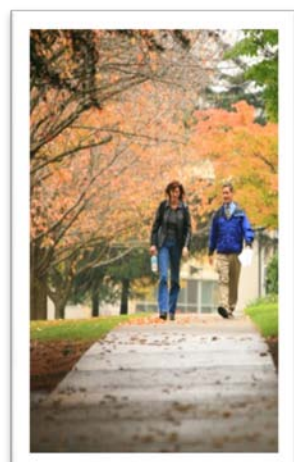




SENATE BILL 442: REPORT TO THE OREGON LEGISLATURE

October 1, 2010

JOINT BOARDS OF EDUCATION
UNIFIED EDUCATION ENTERPRISE
OREGON STATE BOARD OF HIGHER EDUCATION



SENATE BILL 442: REPORT TO THE OREGON LEGISLATURE

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Joint Boards of Education

Unified Education Enterprise

Oregon State Board of Higher Education

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EXECUTIVE SUMMARY

Senate Bill 442 required the Joint Boards of Education to examine **two potential areas of increased efficiency and, further, required the Oregon University System to examine three additional areas and report the results** of this study to appropriate interim legislative committees on higher education by October 1, 2010. This summary provides the conclusions and/or recommendations relevant to each of these five areas.

Section 1.1—A study of the conversion of some or all state institutions of higher education and community colleges to a semester calendar:

There is not convincing data on the impact on student learning of studying under a semester or a quarter system. There was consistent agreement that there are substantial up-front costs and increased personnel necessary for a conversion and that these need to be supported by legislative appropriations and cannot be absorbed within current operating budgets.

Should semester conversion take place, the State and institutions must make a commitment to not allow the change to delay a student's progress towards graduation. A conversion process should be a minimum of three and, preferably, a four-year process from start to finish.

A majority of the resource team recommend delaying any calendar change of this magnitude until student demand has leveled off and state support is more robust. The change to semesters should include a fully-staffed conversion office to oversee the entire process. Institutions that have had successful conversions consistently point to the importance of having a full-time executive level administrator, at least one full-time staff assistant, and a highly discretionary conversion budget that rolls over annually for the duration of the conversion. A majority of the resource team believes that a semester conversion in Oregon should be an all or nothing proposition. In brief, all public postsecondary institutions should convert simultaneously, thus maintaining calendar consistency among Oregon's public institutions of higher education. Notably, President Mary Cullinan of Southern Oregon University reports that her institution is very supportive of converting to a semester calendar and would welcome the opportunity to pilot a semester academic calendar in Oregon with adequate financial support. Such an effort would include working closely with Rogue Community College and other feeder institutions to ensure smooth transitions for students.

Section 1.2—A study of approaches to increase student enrollment and student success for rural residents and recommendations of structural, legal, funding or other changes necessary:

Several policy recommendations were forwarded on behalf of the Joint Boards of Education to the Oregon University System’s Academic Strategies Committee (ASC) in February 2010, seeking to achieve two primary goals: 1) strengthening the college-going culture in rural areas; 2) improving program completion and credential attainment. The full report and recommendations, including estimated costs, can be found in the appendix to this report. A bulleted list of the resource team’s recommendations follows:

- 1) Actions to strengthen college-going culture in rural areas:
 - Increase investment in proven pre-college outreach programs: Increase ASPIRE sites statewide (with priority in rural areas) from 115 to 210. Invest in GEAR-UP to add 10 clusters serving middle and high schools
 - Promote availability of Dual Credit Option through state loan forgiveness initiative as incentive for subject-area M.A.’s agreeing to teach in rural schools
 - Increase pre-college advising skills for middle and high school teachers/counselors by funding summer institutes at colleges and universities
 - Promote student/parent ambassadors for rural middle and high school visitations
 - Increase collaboration among community colleges and universities in rural school outreach (travel funds for college/university visits, training for outreach staff)
 - Increase outreach efforts in rural communities for “adult” learners by increasing access sites and opportunities for gateway/introductory courses

- 2) Actions to improve program completion and credential attainment:
 - Develop new regional “open campus” processes and agreements with financial support for the Eastern Oregon Collaborative Colleges Consortium and for the OSU/TVCC/COCC Madras and Prineville campuses for developmental education
 - Apply a “hub-and-spoke” education model through enhanced rural broadband infrastructure and fiscal support for several rural access points (e.g., extension offices, libraries, K-12 schools). Pilot gateway/introductory courses anticipating small classes

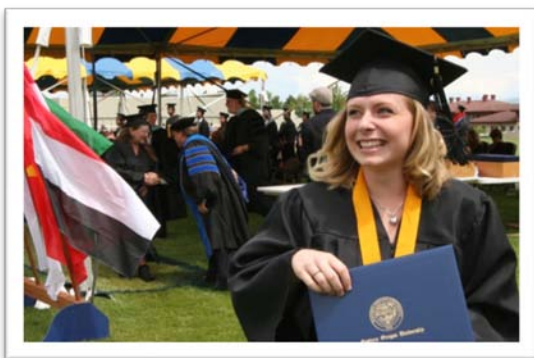


Section 1.3—A study of potential combination of enrollment management functions:

Combination of enrollment management functions at OUS regional institutions and OIT has occurred to the extent feasible at present, both in terms of organizational structure and physical co-location of services. In some cases, staffing levels have been reduced, while in others, staffing has remained stable despite significant enrollment growth. In all cases, staff are cross-trained to better assist students. Capital construction or renovation would further allow co-location of functions on campuses where that is not currently feasible.

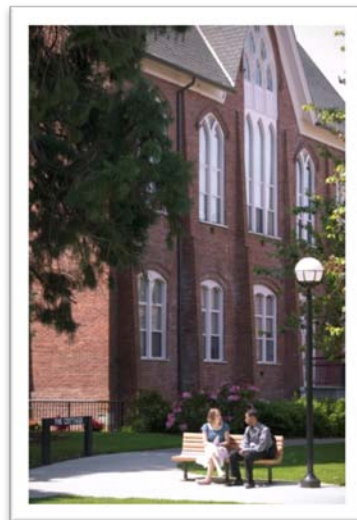
Section 1.4 —A review of the missions and programs of each of Oregon’s public universities of unnecessary program duplication; collaboration among universities to provide for students in all parts of this state, and changes to the institutions' missions and programs:

The State Board of Higher Education assigned this work to the Provosts’ Council, who made use of the Portfolio Concept, in which each institution is viewed as one element in an educational portfolio. In this construct, it is the entire portfolio and not a single institution that serves the educational needs of the entire state. A final consideration that guided this work is that each individual institutional mission must be in at least partial alignment with the various aspects of the OUS mission and goals. The Provosts’ Council examined the activities of each institution in Undergraduate Access, (serving students in specific regions of the state), Program Mission Intensity, and Innovation/Research (the academic areas of focus for each institution). This approach depicts the unique and the shared features of each institution and serves as a basis for an accurate evaluation of program duplication and collaboration. This exercise shows that the OUS institutions are accomplishing the mission and goals set out by OUS in its Long Range Plan. The mission intensity matrices show that many aspects of the mission are covered by multiple institutions. Program duplication is necessary at some points, desirable at some points, and perhaps wasteful at some points. A process for program elimination is currently being developed by the Provosts’ Council for use by all institutions.



Section 2.6 — To the extent feasible and cost beneficial, develop and begin implementation of a common admissions process ,and a report of the enrollment, revenue, costs and savings of this measure:

In the summer of 2009, at the request of the OUS Chancellor’s Office, Information Services at Oregon State University developed the technology infrastructure necessary to implement a common admissions process. By June 2010, the Common Admissions Process was implemented at six of Oregon’s seven public universities (University of Oregon had a pre-existing Memorandum of Understanding with Southern Oregon University whereby they send data on denied applicants to SOU). A table summarizing Common Admissions activity is in Section 6 of this report.



75th OREGON LEGISLATIVE ASSEMBLY—2009 Regular Session

Senate Bill 442 (Enrolled)

Sponsored by COMMITTEE ON EDUCATION AND GENERAL GOVERNMENT

Relating to university consolidation; creating new provisions; amending ORS 351.070; and declaring an emergency.

Whereas it is the goal of this 2009 Act to support institutions in identifying and achieving cost savings to reduce tuition costs for Oregon's college students and strengthen the entire Oregon University System; and

Whereas Oregon must do everything possible to maximize opportunity and educational attainment for Oregonians across the state; and

Whereas Oregon must not sacrifice the quality of degree programs or student learning in order to maintain access to universities; and

Whereas the Oregon University System must focus on ends, rather than means, both in goals and in policy framework; and

Whereas the preservation or reduction of programs and activities must be based on their ability to advance the universities' mission; now, therefore,

Be It Enacted by the People of the State of Oregon:

SECTION 1. (1) The Joint Boards of Education shall conduct a study of the conversion of some or all state institutions of higher education listed in ORS 352.002 and community colleges to a semester calendar and shall submit a report of its findings and recommendations to the appropriate interim legislative committees on higher education no later than October 1, 2010.

(2) The Joint Boards of Education shall conduct a study of approaches to increase student enrollment and student success for rural residents of this state at institutions of higher education listed in ORS 352.002 and community colleges. The Joint Boards of Education shall submit a report of its findings and recommendations concerning structural, legal, funding or other changes necessary to effect such an increase to the appropriate interim legislative committees on higher education prior to October 1, 2010.

(3) The State Board of Higher Education shall conduct a study of the combination of enrollment management functions into a single office at each state institution of higher education listed in ORS 352.002 whose enrollment is less than 7,500 full-time equivalent students as defined by the board. The board shall submit a report of its findings and actions to the appropriate interim legislative committees on higher education not later than October 1, 2010.

(4)(a) The State Board of Higher Education shall review the missions and programs of each institution of higher education listed in ORS 352.002 and shall direct implementation of the following measures:

(A) Elimination of unnecessary duplication of programs in high-cost disciplines, areas of low student demand and graduate level education; and

(B) Collaboration among universities to provide education programs to students in all parts of this state.

(b) The board shall submit a report on changes to the institutions' missions and programs to the appropriate interim legislative committees on higher education not later than October 1, 2010.

SECTION 2. ORS 351.070 is amended to read:

351.070. (1) The Oregon University System, in accordance with rules adopted by the State Board of Higher Education, shall implement a personnel system and may engage in collective bargaining with its employees. All collective bargaining with any certified or recognized exclusive employee representative shall be under the direction and supervision of the Chancellor of the Oregon University System. The Oregon University System shall have payroll authority pursuant to ORS 292.043 to 292.180.

(2)(a) The board shall establish competitive procedures for the purchasing, procurement and contracting of goods, services and information technology, for the benefit of the Oregon University System and all the institutions, departments and activities therein. The board may also establish exemptions from the competitive procedures when appropriate.

(b) The board shall ensure that the hourly rate of wage paid by any contractor upon all public improvements contracts undertaken or the board shall not be less than the same rate of wage as determined by the Bureau of Labor and Industries for an hour's work in the same trade or occupation in the locality where such labor is performed. Claims or disputes arising under this subsection shall be decided by the Commissioner of the Bureau of Labor and Industries.

(c) The board shall adopt policies and procedures that achieve results equal to or better than the standards existing on July 17, 1995, regarding affirmative action, pay equity for comparable work, recycling, the provision of workers' compensation insurance to workers on contract and the participation of emerging small businesses and businesses owned by minorities and women.

(3) The board may, for each institution under its control:

(a) Appoint and employ a president and the requisite number of professors, teachers and employees, and prescribe their compensation and tenure of office or employment.

(b) Demand and receive the interest mentioned in ORS 352.510 and all sums due and accruing to the institutions of higher education for admission and tuition therein, and apply the same, or so much thereof as is necessary, to the payment of the compensation referred to in paragraph (a) of this subsection and the other current expenses of the institutions.

(c) Prescribe fees for enrollment into the institutions. Such enrollment fees shall include tuition for education and general services and such other charges found by the board to be necessary to carry out its educational programs. The board may award student aid from any fund other than the General Fund.

(d) Prescribe incidental fees for programs under the supervision or control of the board found by the board, upon its own motion or upon recommendation of the recognized student government of the institution concerned, to be advantageous to the cultural or physical development of students. Fees realized in excess of amounts allocated and exceeding required reserves shall be considered surplus incidental fees and shall be allocated for programs under the control of the board and found to be advantageous to the cultural or physical development of students by the institution president upon the recommendation of the recognized student government at the institution concerned.

(e) Upon recommendation of the recognized student government, collect optional fees authorized by the institution executive, for student activities not included in paragraph (c) or (d)

of this subsection. The payment of such optional fees shall be at the option and selection of the student and shall not be a prerequisite of enrollment.

(f) Confer, on the recommendation of the faculty of any such institution, such degrees as usually are conferred by such institutions, or as they deem appropriate.

(g) Prescribe the qualifications for admission into such institutions.

(4) Subject to such delegation as the board may decide to make to the institutions, divisions and departments under its control, the board, for each institution, division and department under its control:

(a) Shall supervise the general course of instruction therein, and the research, extension, educational and other activities thereof.

(b) Shall adopt rules and bylaws for the government thereof, including the faculty, teachers, students and employees therein.

(c) Shall maintain cultural and physical development services and facilities there for and, in connection therewith, may cooperate and enter into agreements with any person or governmental agency.

(d) May contract to provide health services at student health centers.

(e) Shall provide health services at student health centers to students.

(f) May provide health services at student health centers to any of the following:

(A) Dependents of students.

(B) Staff.

(C) Faculty.

(g) Shall prescribe and collect charges.

(h) Shall adopt rules relating to the creation, use, custody and disclosure, including access, of student education records of the institutions that are consistent with the requirements of applicable state and federal law. Whenever a student has attained 18 years of age or is attending an institution of post-secondary education, the permission or consent required of and the rights accorded to a parent of the student regarding education records shall thereafter be required of and accorded to only the student.

(5) For each institution under its jurisdiction, the board shall provide opportunities for part-time students to obtain complete undergraduate degrees at unconventional times, which include but are not limited to early morning and noon hours, evenings and weekends. In administering these degree programs, the institution may use any educational facility available for the use of the institution

(6) For all institutions of higher education listed in ORS 352.002, the board shall, no later than October 1, 2010, and to the extent feasible and cost beneficial, develop and begin implementation of a common admissions process that permits applicants to be considered for admission to more than one institution.

SECTION 3. The State Board of Higher Education shall report the enrollment, revenue, costs and savings associated with the measures in ORS 351.070 (6) to the Seventy-sixth Legislative Assembly before October 1, 2010, and the Seventy-seventh Legislative Assembly before October 1, 2012.

SECTION 4. This 2009 Act being necessary for the immediate preservation of the public peace, health and safety, an emergency is declared to exist, and this 2009 Act takes effect on its passage.

Senate Bill 442: Section 1



- SECTION 1.1 – JOINT BOARDS STUDY OF SEMESTER CONVERSION**
- SECTION 1.2 – JOINT BOARDS STUDY OF RURAL ACCESS AND SUCCESS**
- SECTION 1.3 – OSBHE STUDY OF ENROLLMENT MANAGEMENT FUNCTIONS**
- SECTION 1.4 – OSBHE REVIEW OF MISSIONS AND PROGRAMS**

SECTION 1.1 – JOINT BOARDS STUDY OF SEMESTER CONVERSION

Section 1 of Senate Bill 442 from Oregon’s 2009 Legislative Session states:

The Joint Boards of Education shall conduct a study of the conversion of some or all state institutions of higher education listed in ORS 352.002 and community colleges to a semester calendar and shall submit a report of its findings and recommendations to the appropriate interim legislative committees on higher education no later than October 1, 2010.

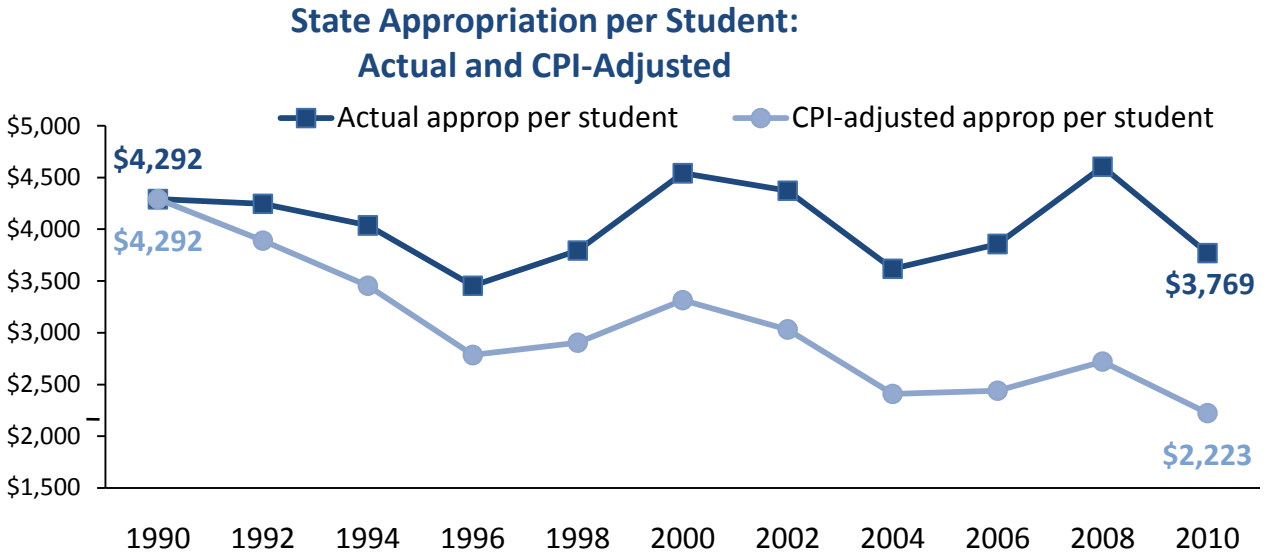
In an attempt to capture the diversity of interests and stakeholders that would be affected by conversion to a semester calendar, a resource team consisting of the following individuals was formed:

Mary Cullinan, President of Southern Oregon University
Herb Chereck, Vice Provost for Enrollment Management, University of Oregon
John Turner, President of Blue Mountain Community College
Camille Preus, Commissioner of the Department of Community Colleges & Workforce Development
Roy Koch, Provost, Portland State University
Scott Huff, Dean of Instruction, Portland Community College Cascade Campus
Carol Harding, Chair of Humanities Division, Western Oregon University
Alicia Moore, Dean of Student & Enrollment Services, Central Oregon Community College
Paul Doescher, Professor of Restoration Ecology, Oregon State University
Paul Fisher, Instructor of Business Technology, Rogue Community College
Casey Dreher, Student at Eastern Oregon University
Melissa Richards, Student at Lane Community College
Cristal Sandoval, Student at Western Oregon University
Larry Galizio, Director of Strategic Planning, Oregon University System

Context and Background

Higher Education Budget: History

As demand for higher education in Oregon continues to increase in the first decade of the 21st century, State appropriations, as a percentage of the State’s public postsecondary institution’s budgets, have declined considerably.



Passage of property tax limitation Measure 5 in 1990, and continually increasing demand for public services, has resulted in decreased state support for the Oregon University System (OUS) and Oregon’s seventeen community colleges. After several special sessions in response to a revenue shortfall, support for OUS in 2001-2003 was 1.4 percent below the 1999-2001 level. And in 2003-2005 support declined another 12 percent.

The state-student share of costs went from 51 percent to 41 percent in 1999-2001 to 35 percent to 55 percent in 2005-2007 and 37 percent to 53 percent in 2007-2009. According to the annual State Higher Education Finance FY 2009 Report from the State Higher Education Executive Officers, Oregon ranks 43rd in state higher education appropriations per FTE (Full-Time Equivalent). The 2009-2011 state appropriated operating budget for the Oregon University System represented a decrease of 8.1 percent from the 2007-2009 Legislatively Approved Budget.

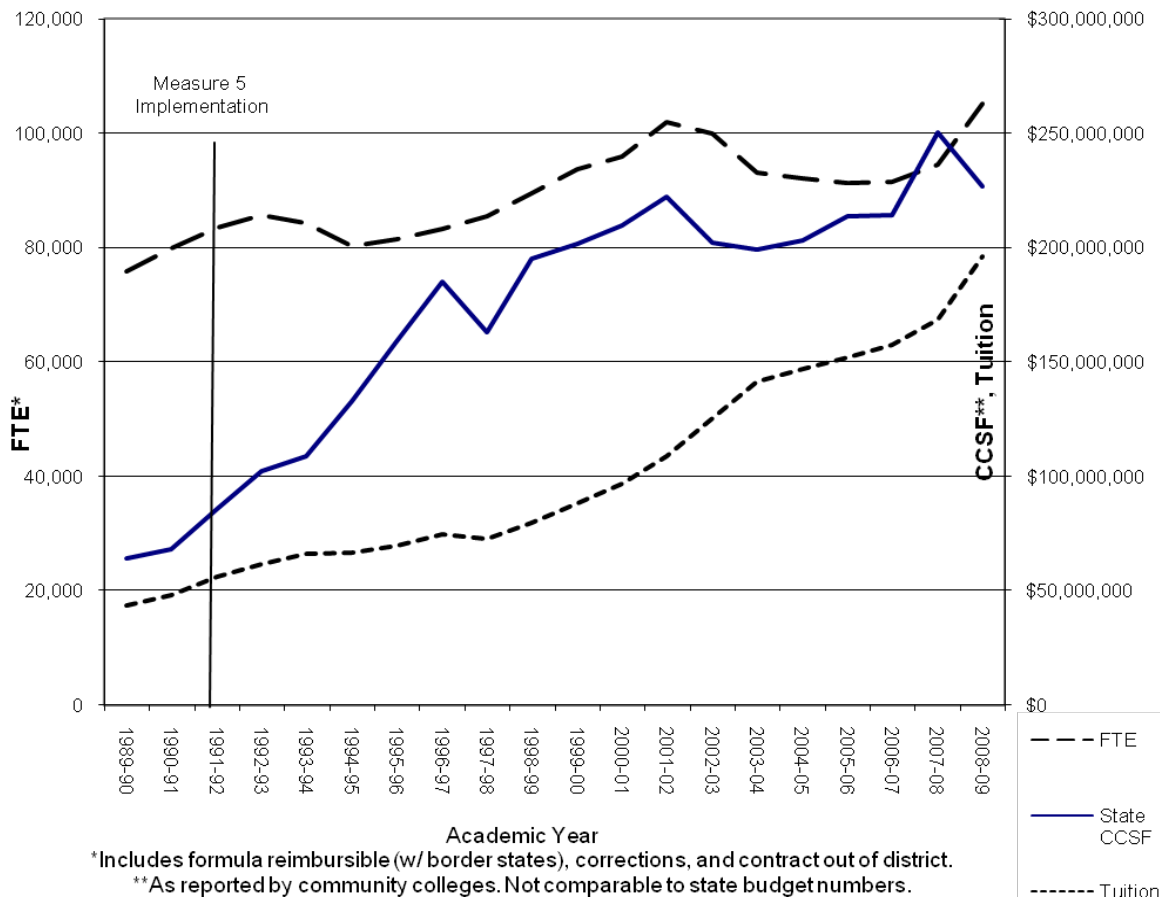


Table 7										
State Higher Education Finance (SHEF)										
Total Educational Revenue per FTE										
Constant Dollars										
State	2004 Rank	FY 2004	2008 Rank	FY 2008	2009 Rank	FY 2009	1 Year % Change	FY 2009 Index to US Average	5 year % Change	% of Total Educ Rev from Stimulus
Wyoming	3	\$14,332	1	\$17,304	1	\$17,460	0.90%	158.75%	21.82%	0.00%
Alaska	6	\$13,263	2	\$16,716	2	\$17,317	3.59%	157.45%	30.57%	0.00%
Delaware	5	\$13,461	3	\$14,839	3	\$15,004	1.12%	136.43%	11.47%	0.00%
New Jersey	1	\$15,810	4	\$14,773	4	\$14,696	-0.52%	133.62%	-7.05%	0.00%
Maryland	2	\$14,640	7	\$14,105	5	\$14,640	3.79%	133.12%	0.00%	0.00%
Vermont	8	\$12,781	8	\$14,003	6	\$14,326	2.31%	130.25%	12.09%	0.00%
Maine	11	\$12,200	11	\$13,415	7	\$14,252	6.24%	129.58%	16.81%	2.52%
Connecticut	4	\$13,505	5	\$14,557	8	\$13,974	-4.01%	127.06%	3.47%	0.00%
Pennsylvania	9	\$12,781	12	\$13,320	9	\$13,679	2.70%	124.38%	7.03%	1.29%
Rhode Island	7	\$13,244	9	\$13,725	10	\$13,562	-1.19%	123.31%	2.40%	0.00%
Oklahoma	34	\$9,843	14	\$12,901	11	\$13,457	4.31%	122.36%	36.72%	0.00%
Alabama	12	\$11,803	6	\$14,244	12	\$13,255	-6.94%	120.52%	12.31%	0.00%
Kentucky	13	\$11,588	10	\$13,484	13	\$13,184	-2.23%	119.87%	13.77%	0.00%
Michigan	10	\$12,400	15	\$12,801	14	\$13,059	2.01%	118.74%	5.31%	0.00%
Texas	25	\$10,306	13	\$13,161	15	\$12,327	-6.34%	112.08%	19.61%	0.00%
Arkansas	20	\$10,550	27	\$11,571	16	\$12,033	3.99%	109.41%	14.06%	0.00%
West Virginia	33	\$9,890	17	\$12,545	17	\$12,032	-4.09%	109.40%	21.66%	0.00%
Idaho	18	\$10,845	22	\$11,840	18	\$11,857	0.14%	107.81%	9.33%	0.00%
Hawaii	44	\$8,611	34	\$10,982	19	\$11,819	7.62%	107.46%	37.26%	0.00%
North Dakota	36	\$9,759	21	\$11,959	20	\$11,812	-1.23%	107.40%	21.03%	0.00%
New York	19	\$10,655	24	\$11,703	21	\$11,795	0.78%	107.24%	10.69%	0.00%
Arizona	41	\$9,246	26	\$11,617	22	\$11,759	1.21%	106.91%	27.18%	6.26%
Tennessee	21	\$10,498	23	\$11,715	23	\$11,756	0.35%	106.89%	11.98%	4.25%
Iowa	24	\$10,352	30	\$11,299	24	\$11,546	2.18%	104.98%	11.53%	0.00%
Mississippi	16	\$10,943	16	\$12,568	25	\$11,394	-9.34%	103.60%	4.12%	0.00%
Virginia	35	\$9,784	29	\$11,362	26	\$11,355	-0.07%	103.24%	16.05%	0.00%
Illinois	29	\$10,103	37	\$10,569	27	\$11,297	6.88%	102.72%	11.82%	0.00%
Nevada	14	\$11,344	25	\$11,676	28	\$11,290	-3.30%	102.66%	-0.47%	0.00%
Minnesota	23	\$10,405	28	\$11,418	29	\$11,243	-1.53%	102.23%	8.05%	1.28%
North Carolina	15	\$10,969	19	\$12,282	30	\$11,239	-8.49%	102.19%	2.47%	3.13%
Nebraska	40	\$9,542	31	\$11,231	31	\$10,866	-3.25%	98.80%	13.88%	0.00%
Georgia	30	\$9,950	33	\$11,000	32	\$10,821	-1.63%	98.39%	8.75%	0.57%
South Carolina	17	\$10,847	18	\$12,490	33	\$10,801	-13.53%	98.21%	-0.42%	0.00%
New Hampshire	43	\$8,715	36	\$10,769	34	\$10,750	-0.18%	97.74%	23.36%	0.00%
Louisiana	45	\$8,577	32	\$11,055	35	\$10,616	-3.97%	96.53%	23.77%	0.00%
Wisconsin	31	\$9,943	39	\$10,331	36	\$10,397	0.64%	94.53%	4.57%	0.00%
Missouri	27	\$10,223	46	\$9,794	37	\$10,272	4.88%	93.40%	0.48%	0.00%
New Mexico	22	\$10,490	35	\$10,805	38	\$10,185	-5.74%	92.61%	-2.90%	0.00%
Ohio	32	\$9,942	42	\$10,167	39	\$10,133	-0.33%	92.13%	1.92%	0.00%
Massachusetts	26	\$10,283	20	\$12,215	40	\$10,113	17.21%	91.95%	-1.65%	1.39%
Indiana	28	\$10,144	40	\$10,238	41	\$10,102	-1.33%	91.85%	-0.42%	1.58%
Kansas	38	\$9,678	44	\$9,833	42	\$9,677	-1.59%	87.99%	-0.01%	0.70%
Oregon	37	\$9,703	38	\$10,474	43	\$9,447	-9.81%	85.90%	-2.64%	4.03%
Utah	46	\$8,208	41	\$10,197	44	\$9,348	-8.32%	85.00%	13.89%	2.69%
Colorado	50	\$7,573	50	\$8,426	45	\$9,029	7.15%	82.10%	19.23%	8.35%
Florida	42	\$8,737	45	\$9,803	46	\$8,872	-9.50%	80.67%	1.54%	0.00%
Montana	49	\$7,613	48	\$8,724	47	\$8,852	1.46%	80.48%	16.27%	0.00%
Washington	48	\$7,995	47	\$9,239	48	\$8,757	-5.21%	79.62%	9.53%	0.00%

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Constant Dollars										
State	2004 Rank	FY 2004	2008 Rank	FY 2008	2009 Rank	FY 2009	1 Year % Change	FY 2009 Index to US Average	5 year % Change	% of Total Educ Rev from Stimulus
South Dakota	39	\$9,641	43	\$10,134	49	\$8,660	14.55%	78.74%	10.18%	3.82%
California	47	\$8,048	49	\$8,532	50	\$8,426	-1.24%	76.61%	4.70%	9.67%
US		\$10,156		\$11,210		\$10,998	-1.89%		8.30%	1.96%
Oregon vs. US		95.54%		93.44%		85.90%				

Importantly, as funding for higher education in Oregon has decreased on a percentage basis, demand has grown dramatically. For Fall 2009, a record 91,580 students enrolled at OUS institutions, an increase of 5.8 percent over last year. This is the highest percentage increase for the System since 2001. This follows enrollment growth (headcount) for Fall 2008 of 5.2 percent to 86,546 students—which had been the greatest demand for postsecondary education since 2002. These figures compare to a ten-year average annual increase of 3.32 percent.

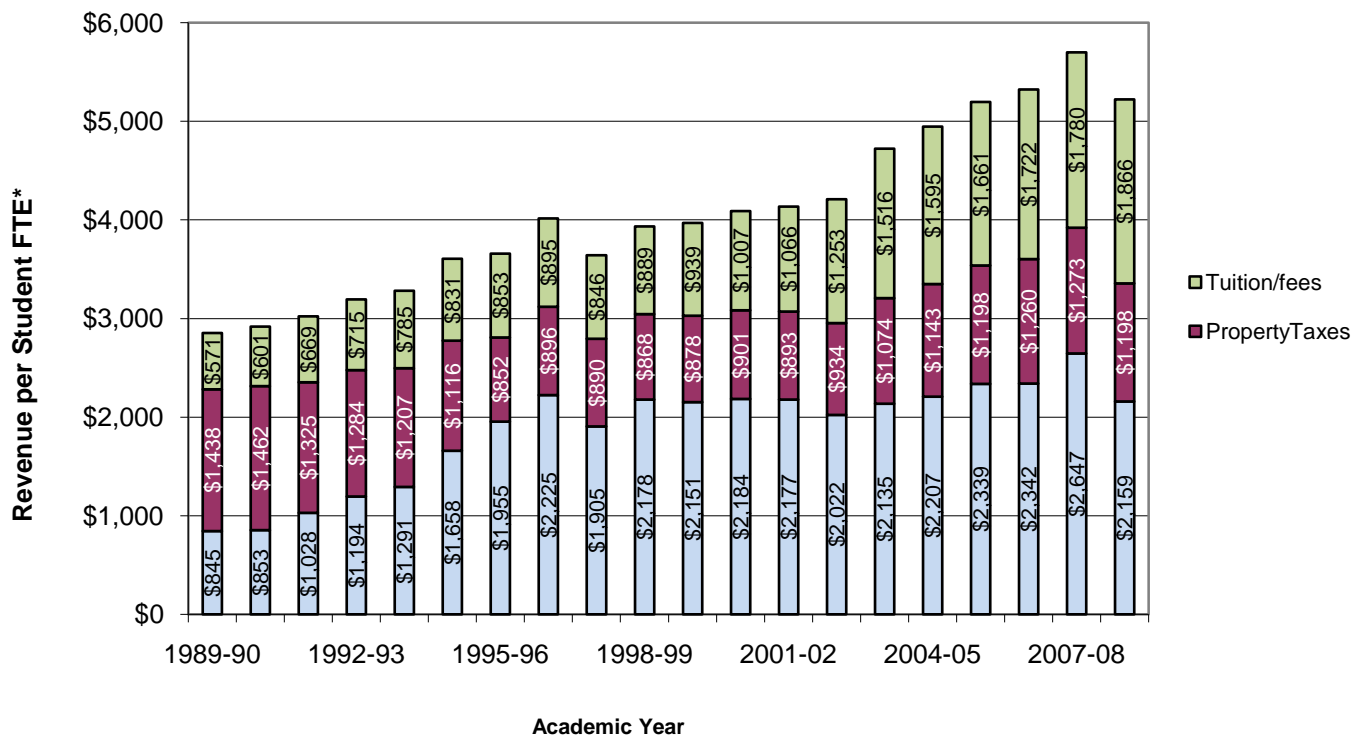
Oregon Community Colleges FTE, Tuition, and State CCSF funding history



For Oregon’s community colleges, the 2001-2003 special session reductions also had a significant impact. State appropriations for 2001-2003 were similar to their 1999-2001 levels. Following failure of Measure 30 in 2003, State appropriations for community colleges declined another 5 percent in the 2003-2005 budget. In contrast, 2005-2007 saw a 4.1 percent and 2007-2009 a 17.4 percent increase. However, the recent economic downturn resulted in an approximately 9 percent decline in state appropriations as compared to the 2007-2009 level.

On average, tuition and fees have increased by 44 percent in the past 6 years for Oregon’s 17 community colleges, making Oregon one of the most expensive places to attend community college in the entire western region. Despite this, enrollment growth at Oregon’s community colleges for Fall 2009 has increased by approximately 15 percent.

**Community College Revenue Sources
(Tuition and Fees, Local Property Taxes, State General Fund)**



*Full-Time Equivalent (FTE) is a calculated value. It represents 510 hours of instructional time and is a measure of total student activity. Includes corrections, border states, COD, non-reimbursable, and funding formula reimbursable FTE.

Senate Bill 442

With State investment in public postsecondary education in Oregon consistently decreasing as a percentage of total costs, and economic forecasts for future biennia promising further cuts, Senate Bill 442 seeks to locate efficiencies while maintaining educational quality at our public postsecondary institutions of higher education. Consideration of moving to a semester

academic calendar was included in the bill as one possible move toward greater efficiency as institutions would have only three (including summer term) intensive periods of activity for business functions, academic advising, financial aid processing, grading, and all the myriad activities required with the beginning and ending of the term.

Equally important, discussion in the Senate Education Committee hearings on SB 442 suggested that a semester calendar might be preferable for pedagogical reasons as well. The notion that a 16 or 17-week academic term would provide an opportunity for subjects to be examined in greater depth and breadth is an oft-repeated claim of proponents of a semester calendar.

Yet, confirmed by analyses of recent reports from other states considering semester conversion, a literature search on academic calendars and learning demonstrates a lack of empirical data supporting many of the claims of proponents of either a semester or quarter calendar. As one example, a 2009 analysis prepared for the president of Rochester Institute of Technology concluded that the assertion that semesters are more conducive to student learning than quarters, “...may appeal to the common sense of semester proponents, but it has never been inductively legitimized” (p. 23).

Therefore, the resource team, in compliance with section 1 (1) of Senate Bill 442, seeks to provide the legislature and postsecondary stakeholders and policymakers in Oregon with information and research concerning many of the challenges and opportunities of converting to a semester academic calendar. The goal of the resource team has been to find the most salient and useful information on the multiplicity of issues concerning semester conversion, so that policymakers and stakeholders are provided the opportunity to make an informed decision in its subsequent deliberations. In addition to data concerning the costs, benefits, challenges, and opportunities surrounding an academic calendar change, the reports concludes with a brief list of recommendations for consideration.

Methods

In preparation for the report, the resource team used the following information collection methods:

- Interviews and information-gathering from individuals and departments that would be involved in conversion to a semester calendar
- Analysis of documents and studies by institutions in other states that have either considered and/or completed a conversion to a semester calendar
- Interviews with individuals from other states that have experienced either a Systemwide or single institution transition to a new calendar
- An intensive budgetary analysis by four Oregon institutions – two community colleges and two universities – representing different sized institutions
- Surveys of Oregon post-secondary faculty, students, and staff
- Surveys and interviews with business organizations and industries potentially affected by a calendar change

Remembrance of Things Past: Oregon's Experience with a Semester Calendar in the 1980s

The [Appendix A](#) of this report includes a more detailed chronology of significant issues and decisions within the Oregon University System (OUS) regarding a potential change to a semester academic calendar that occurred in the late 1980s. What follows is a condensed description of those issues and actions that culminated in the Oregon State Board of Higher Education reversing an earlier decision to move all of the OUS institutions to a semester calendar.

From its establishment in 1932, the Oregon University System and its institutions have been on a quarter system. In 1972, the Oregon State Board of Higher Education (OSBHE) explicitly recognized a common calendar when the University of Oregon was authorized to move its Law School to an early semester system. In granting the University of Oregon this authority, the Board said that the institution could not move unilaterally to adopt the semester system for the entire university and that any adoption of a semester calendar had to be part of a statewide adoption that included other OUS institutions and Oregon community colleges. In 1980 and 1982, the Board changed its policy on criteria for a common academic calendar stating that it would consider an institutional request for a different academic calendar if it were cost-effective, pedagogically sound, and would not create transfer problems. In 1983, the Board voted to deny a request from the University of Oregon for authorization to move to a semester calendar. A primary concern of the Board was whether such a change should be made by a single institution or the entire System.

Ongoing debate about the possibility of the OUS going to a semester calendar led the Interinstitutional Faculty Senate (IFS) to send a letter to the OSBHE's president recommending that:

The Oregon State Board of Higher Education came to a timely decision concerning the quarter-semester issue; that such decision whatever it be, place the matter at rest for the foreseeable future; and that if the decision is to change to the semester system that the change take effect in the academic year 1989-90.

Minutes of the IFS meeting point to a concern that continual discussion was leading to pedagogical turmoil.

Late in 1986, Chair of the Oregon Community College Presidents' Council, Ronald Daniels, sent a letter to Chancellor William Davis expressing frustration among community college presidents that the OSBHE might be acting without providing community colleges the opportunity to be involved. Among the concerns for community colleges included the impact a calendar change might have on short-term training and opportunities for student access to college.

In January of 1987, the OSBHE voted to approve moving to semesters in 1990. Extensive System and campus planning was undertaken, with a 1997 OUS Report estimating that faculty and administrative personnel had spent approximately 150,000 hours revising general education

requirements and reorganizing curricula. However, Oregon Community College Commissioner Michael Holland expressed a lack of enthusiasm for the change and argued that there needed to be further discussion with community colleges.

In 1988, intense pressure from the food-processing, agricultural, and tourism industries led the OSBHE to hold public hearings in October to review academic calendar issues. The concern of the aforementioned industries was not semesters per se, but the timing of the academic calendar and the perceived disruption of the student labor force.

In a September letter to legislators, OUS Vice Chancellor for Academic Affairs Larry Pierce wrote that 60-75 percent of the semester conversion work had been completed. On December 9th, the OSBHE reversed its January 1987 decision to convert to a semester calendar. The specific concerns cited included: the perceived negative impact on early fall employment of student-workers in the agribusiness and tourism sectors; the failure to make a solid case that semesters were superior for academic quality and pedagogy; and a letter from the Oregon Student Lobby indicating that 63 percent of State System students opposed the conversion.

“In the future, when we look to a major policy decision such as this, we should be very careful to outline all of the potential issues and make sure that all of the constituents are heard before we make that decision.” – Kasey Brooks, State Board of Higher Education, 1988

Subsequently, in a follow-up analysis done in November of 1996, an Academic Calendar Solutions Team met with a representative from the Oregon Employment Division. Data revealed that the argument that a conversion to semesters would adversely affect the seasonal employment of college students was not supported by the data. Most college students, it found, were not employed in industries with seasonal influence.

In 2010, although many personnel involved in Oregon’s aborted semester conversion in the late 1980s no longer work in postsecondary education in the state, a significant enough contingent of the workforce remain active, thus affecting the perception of the legitimacy of the process. In 1988, reflecting on the Board’s last minute reversal, higher education board member Kasey Brooks warned, “In the future, when we look to a major policy decision such as this, we should be very careful to outline all of the potential issues and make sure that all of the constituents are heard before we make that decision.”

National Data on Calendar Preference

According to national Integrated Post Secondary Data System (IPEDS) data from 2007 of the 2,049 public postsecondary institutions (both universities and community colleges), 1,559, or 76 percent, were on a semester calendar. Among 4-year institutions, 593 of the 668 have a semester calendar, or 89 percent of the total. Among 2-year institutions, 936 of the 1,145 are on a semester calendar, or 82 percent of the total. For your reference, included in the appendices is a list of all Oregon-based public, independent, and for-profit institutions and their current academic calendars.

Calendar System for Title IV Institutions

From IPEDS, Fall 2007

Row Sector	Semester	Quarter	Continuous	Differs by program	Four-one-four plan	Other academic year	Tri-mester	Grand Total
Public- 4-year or above	593	54			10	2	9	668
Public- 2-year	936	112	48	39	1	2	7	1,145
Public- less-than 2-year	30	6	56	127		9	8	236
Private not-for-profit- 4-year or above	1,231	124	7	4	128	26	61	1,581
Private not-for-profit- 2-year	112	19	11	19		5	18	184
Private not-for-profit less-than 2-year	18	1	42	28	1	4	2	96
Private for-profit- 4-year or above	114	244	18	8		98	16	498
Private for-profit- 2-year	84	267	304	164		25	18	862
Private for-profit less-than 2-year	30	42	989	333	1	25	3	1,423
Grand Total	3,148	869	1,475	722	141	196	142	6,693

SEMESTER CALENDAR SYSTEM - A calendar system that consists of two semesters during the academic year with about 16 weeks for each semester of instruction. There may be an additional summer session.

QUARTER CALENDAR SYSTEM - A calendar system in which the academic year consists of 3 sessions called quarters of about 12 weeks each. The range may be from 10 to 15 weeks. There may be an additional quarter in the summer.

CONTINUOUS BASIS (FOR PROGRAM ENROLLMENT) - A calendar system classification that is used by institutions that enroll students at any time during the academic year. For example, a cosmetology school or a word processing school might allow students to enroll and begin studies at various times, with no requirement that classes begin on a certain date.

DIFFERS BY PROGRAM (CALENDAR SYSTEM) - A calendar system classification that is used by institutions that have occupational/vocational programs of varying lengths. These schools may enroll students at specific times depending on the program desired. For example, a school might offer a 2-month program in January, March, May, September, and November; and a 3-month program in January, April, and October.

FOUR-ONE-FOUR PLAN - The 4-1-4 calendar consists of 4 courses taken for 4 months, 1 course taken for 1 month, and 4 courses taken for 4 months. There may be an additional summer session.

OTHER ACADEMIC CALENDAR SYSTEM - Category used to describe "non-traditional" calendar systems at 4-year and 2-year degree-granting institutions. These can include schools that offer primarily on-line courses or "one course at a time".

TRIMESTER CALENDAR SYSTEM - An academic year consisting of 3 terms of about 15 weeks each.

According to a December 2000 study by the Washington State Higher Education Coordinating Board, there have been two large-scale national efforts on academic calendar conversion. Both of these national efforts moved institutions from a semester to a quarter system. The first was a federal wartime directive in 1918. The U.S. War Department imposed the quarter system on all colleges participating in the Student Army Training Corps program in order to prepare more officers for the battlefield in a shorter period of time. In the 1960s, although the most common anecdotal reason cited was "managerial/fiscal management ease," the increasing number of students, including Vietnam Veterans taking advantage of the G.I. Bill, influenced the push to the quarter system to offer more units of study over a year to accommodate the increased demand.

Calendar Classification

The previously mentioned June 22, 2009, report prepared for the president of the Rochester Institute of Technology, entitled, *Quarter-to-Semester Calendar Conversion* by Vice President of Special Projects, Katherine J. Mayberry, detailed concisely the basics of both calendar classification and recent usage trends in the U.S. What follows is information taken from pages 4-6 of that report available online at: <http://www.rit.edu/conversion/resources.php>

Three types of calendars have dominated U.S. academic institutions of higher education in the past seventy years.

Quarters: four equal terms of 10-11 weeks spread throughout an entire calendar year, typically beginning in August or September and ending the following August.

Semesters: Two equal terms of 15-17 weeks spread between late summer (August-September) and early spring (April-June) with a third summer term of shorter length.

Trimesters: Three terms of equal length (typically 10-12 weeks) spread between September and May-June with no use of summer.

Sub-categories: Both the quarter and semester models offer “early-start” and “late-start” variants.

- **Early-start quarter**: fall quarter typically begins on or before Labor Day and spring quarter ends in mid-to-late May.
- **Late-start quarter**: fall begins after Labor Day and spring term ends in June.
- **Early-start semester**: fall semester begins mid-to-late August and spring semester ends in early May.
- **Traditional (late-start) semester**: fall begins in September and spring extends though late May/early June.
- **4-1-4**: 16-week fall semester begins in late August and is followed by a one month “inter-session” in January designed for special study. Spring semester runs from February through May. This option may or may not include a summer term.

Usage Trends: Quarters

Peak popularity of the quarter academic calendar in the U.S. was in the early 1980s with 25 percent of institutions employing the quarter system (Quann). Currently, Oregon, California, and Washington are the three states with the highest number of institutions on the quarter system.

In New England, none of the region’s community colleges are on the quarter system, and only Dartmouth is on quarters.

Usage Trends: Semesters

Below is a list of schools and systems that in the last fifteen years have either converted to a semester calendar or have indicated a plan to do so:

Alabama System (1998)	Northeastern University (2003)	University of Cincinnati (2012)
University System of Georgia (1998)	Shawnee State University (2007)	California State at Los Angeles (2012)
Utah State System (1998)	Northwood University (2010)	
University of Minnesota System (1999)	Principia College (2011)	
Auburn University (2000)	Ohio University (2011)	
Michigan Tech (2000)	Ohio State University (2012)	
Youngstown State (2000)	Wright State University (2012)	

According to Mayberry (2009), “[T]he conversions of many of the state schools cited above were required or recommended as part of a statewide decision, although no school moved forward with the process until a favorable feasibility study and community vote had been conducted. Ohio State, for example, conducted a conversion feasibility study in 2000-01, on the basis of which they determined the timing was not propitious (they have since committed to a 2008-2012 conversion)” (p.6).

Impact on Students

The group most obviously affected by converting from a quarter to semester calendar is students and it is important that we not lose sight of the need to provide a System that supports students in achieving their academic goals. With that, it’s important to highlight the potential impacts and considerations of a semester conversion as they impact our students.

Many institutions that have recently made this change included overt statements about their commitment to students during the change process. As an example, the University of Cincinnati made the following guarantee to all students who met with an academic advisor and developed a transition plan: “students would not lose earned credit, would not be delayed in their degree completion timeline and would not incur additional costs in completing their degree due to the change to semesters.”¹

In support of not losing sight of students as the core of what we do, below are brief highlights of how a change to a semester calendar may impact students. The assumptions noted below include only those that have been validated by institutions that recently underwent this

¹The full text of UC’s “Pledge to Students” is available [online](http://www.ous.edu/state_board/jointb/sem/files/Semester-Conversion_Taskforce_Final_ReportMay08%5b2%5d.pdf) at: http://www.ous.edu/state_board/jointb/sem/files/Semester-Conversion_Taskforce_Final_ReportMay08%5b2%5d.pdf, page 13

change. Thank you to the Rochester Institute of Technology for their work in compiling this information.²

Converting to semesters positively affects student graduation and retention rates—but the impact appears to be temporary. Institutions that have recently made a switch to a semester calendar note that current students close to certificate or degree completion tend to increase their credit load the year prior to the change in order to avoid the associated complexities. As a result, colleges and universities experience a *temporary* increase in graduation rates.

Converting to semesters negatively affects enrollment in the terms immediately following the conversion. The result of an accelerated graduation is lower enrollment the following year. More significant than this drop is the tendency of existing students not to enroll during the first and second semester immediately following transition (Northeastern University).

Converting to semesters negatively impacts part-time enrollment, as there are fewer entry points for students. The quarter calendar is particularly attractive to students who have significant non-educational commitments (work, family, etc.) and those who take classes intermittently. To avoid a decline in serving this population, many semester institutions offer several classes that start and stop at varying points throughout the term. The downfall that comes with this is that such varied dates increase administrative oversight needs and many efficiencies gained due to the conversion are lost.

Changing to a semester calendar reduces the total number of courses offered.

Changing to a semester calendar reduces the total number of courses offered. This most affects stand-alone courses as compared to sequence courses. According to the University of Minnesota, schools report a decrease of 1–38 percent in courses offered (note that most examples come from universities with a higher number of upper-division, specialized, stand-alone courses and, as such, the affect on community colleges may be towards the lower end of the percentages offered).

Students pay less money for textbooks on semester calendars. Most college textbooks are written on a semester basis and, as such, the content better aligns with semester calendars. As a result, students need to buy fewer textbooks over the course of their academic career. (Wright State, University of Minnesota, and Northeastern).

The early start semester model allows students to enter the summer (and permanent) job market earlier. A true statement and students do find this to be an advantage (Wright State University). In Oregon, students attending several of the independent colleges finish the term one month and more earlier than do students at the state’s public institutions. For example, in

² For a full listing of RIT’s “Reliable and Suspect Assertions”, see their “[Quarter to Semesters Conversion Report](http://www.rit.edu/~w-aa/media/Calendar%20Conversion%20Report%20by%20Dr.%20Mayberry.pdf)” online at: <http://www.rit.edu/~w-aa/media/Calendar%20Conversion%20Report%20by%20Dr.%20Mayberry.pdf>, pages 22 – 25.

the spring of 2010, Lewis & Clark College students will take final exams from May 3-6, Pacific University students from May 12-14, and Linfield College, May 25-28. In contrast, most public institutions have finals week June 7-11, 2010. A semester calendar would permit students attending Oregon's public institutions of higher education a similar calendar for internships, jobs, and other time sensitive endeavors. However, it is also important to note that seasonal jobs in natural resources, wildland fire, and agricultural fields may be negatively impacted. This is because field and fire seasons often extend into September.

Students at semester schools have more opportunities to study abroad. A semester calendar presents more opportunities for students to study abroad as nearly all colleges and universities outside of the U.S. are on semester calendars. (Ohio State University, California State University – Los Angeles)

The above statements are those validated by institutions that recently made the change to semesters. However, several other assumptions are frequently made, but have yet to be proven. Among these is that semesters are more conducive to student learning (actual affect on learning has not been conclusively proven, although institutions report that a longer term calendar provides a greater opportunity to intervene and help struggling students succeed), and converting to semesters has a long-term positive effect on graduation and retention rates (no data to support or refute this claim).

Enrollment, Administrative, and Budgetary Impact

The above section shares information about potential effects that a conversion to a semester calendar might have on students. That said, it is also important to share assertions regarding impact on enrollment, administrative functions, and institutional budgets. Again pulling from the Rochester Institute of Technology's report:

Converting to semesters negatively impacts enrollment. As previously mentioned, a temporary boost in graduation rates may equate to a temporary decrease in subsequent year enrollment. A recent poll shows that institutions experience anywhere from a 5 percent to 19 percent decrease for one to two years following such a change. This decline, if not carefully planned for, can end up being the single largest financial impact of such a conversion.

A decline is most common at schools whose student load was five three-credit courses per semester (as opposed to four-credit courses). This decline results from a student concern about the degree of difficulty they will face under the semester calendar. The figures below represent the percent and duration of full-time enrollment decline experienced by some institutions and systems during a semester conversion.

Full-Time enrollment following semester conversion

<u>School/System</u>	<u>% Net Decline</u>	<u>Decline Duration</u>
Alabama System	18.7%	2 years
Georgia System	11.8%	1 year
Utah System	5.8%	Temporary
College of DuPage	17.1%	1 year
Minnesota	~5.0%	1 year

Part-Time enrollment

Community colleges are particularly concerned that part-time student enrollment would drop after a semester conversion. Since the community college mission is to offer maximum scheduling flexibility for students, as well as many opportunities to enter programs and courses, a straight semester calendar may create impediments for part-time students. The College of DuPage, a large community college in Chicago, Illinois, experienced a significant decrease in the number of non-traditional students taking courses on its campus following a semester conversion.

College of DuPage 10th Day Headcount

<u>Age</u>	<u>Fall 2003</u>	<u>Fall 2006</u>	<u>% Net Decline</u>
17 to 19	6,050	5,708	5.7%
20 to 22	6,381	5,939	6.9%
23 to 39	7,981	6,749	15.4%
40 to 59	4,700	3,309	29.6%
60+	1,482	757	48.9%

Even at the university level a part-time enrollment decline in the year following a semester conversion is likely. Northeastern University, after an analysis projecting an 11 percent decline in part-time students, decided to keep its continuing education unit and law school on semesters (Mayberry, p. 23).

Students pay less money for textbooks on semester calendars. As previously mentioned, a semester calendar generally decreases textbook costs to students. The flip side of this, however, is that bookstore revenues decrease, sometimes as much as 20 percent (University of Minnesota).

Moving to a semester calendar results in substantial annual cost savings. While the number of times a process needs to happen throughout the year oftentimes decreases from four to three, such a decrease is not enough to result in the reduction of staff. More importantly, the human resources and associated time spent to re-align nearly all aspects of the institution during the conversion is rarely gained back by an institution. The safest proposition is that which was confirmed by the University of Tennessee: There are not so much post-conversion operational savings or additional costs, as there are timing shifts that balance out.

A document summarizing perspectives and data from other states is included in [Appendix A4](#).

Considerations for Administrative and Student Services Functions

Communication

Veterans of successful conversion processes emphasize the importance of constant, consistent, multi-channel communication regarding the calendar change. In advising the University of Minnesota on their semester conversion process, University of Cincinnati staff offered the following guidance:

“Every student, faculty, and staff member will be affected in some way...Make sure it is ‘ready, aim, fire’ and not ‘ready, fire, aim’ regarding communication planning, implementation, and other functions related to conversion. If adequate time and resources are not provided to the communications function, a number of integrated conversion functions likely will be hampered, leading to potential long-term damage to University of Cincinnati’s regional and national reputation” (Zetterberg, from RIT’s report).

While updating of many campus materials is routine, a review of *all* campus-wide information will be required in order to adequately communicate new policies, certificate and degree requirements, dates, deadlines, and the like. How this information is communicated to faculty, staff, and students is critical so that students are not adversely affected by incorrect information.

Tasks: Nearly every form of campus information will require updating to reflect appropriate changes. A *partial* listing of these items includes:

- Website
- College catalog
- Class schedules
- Academic calendar
- Advising guides
- Any campus form in which a “term” is a required field
- Student handbooks/planners
- Staff handbooks/planners
- Faculty and staff training materials

Personnel: To the extent possible, the development and distribution of semester-conversion related information should be centralized and under one communication professional fully dedicated to and involved in the conversion process.

Costs: In addition to personnel costs, institutions will absorb the cost of printing all information communicated via paper (brochures, forms) just prior to the transition year as many of these are only printed on a multi-year basis.

Information Technology (IT)

Regardless of the specific system used, Oregon's public institutions each maintain an information system which integrates student functions such as recruitment, admissions, registration, financial aid, student accounts, and degree processing, as well as personnel or administrative systems including human resources, payroll, benefits, accounts payable/receivable and the like. Given today's automated world, it is imperative that each institution's IT Department has the appropriate technology and staffing to support this conversion early in the semester conversion process so that they, in turn, can support the decisions made by the variety of semester conversion steering committees. At the minimum, converting to semesters will require setting up a duplicate information system to manage the new processes as they are developed, all the while maintaining the current system both prior to, during, and post-conversion. Additionally, several institutions may not have comprehensive systems addressing all functions and may need to research, purchase, and implement such systems prior to any semester conversion.

Tasks:

IT tasks may include the duplication of existing systems with new policies and practices; maintaining current systems with updates and modules to comply with on-going changes to state and federal requirements; purchase of a "canned" system such as Banner, PeopleSoft, DataTel or others.

As every course will need to be redesigned, institutions may wish to also consider purchase and implementation of a course approval management system to better manage this process electronically, as this is currently a paper intensive process at many institutions. Taking it to the next level, CCWD and OUS may want to consider purchasing a system for use by member schools as well as for the state approval process.

As every certificate or degree will require redesign, institutions may also consider purchase and implementation of a degree audit system to better manage the changes and communicate information to students.

Institutions will need to evaluate their current technology systems to determine if they are able to support a comprehensive change to semesters. In some cases, institutions may need to purchase a "canned" (as opposed to home-grown/legacy) information system, degree audit system, or other administrative support solutions.

Cost: The most significant cost of creating a duplicate system is the personnel associated with implementation and the associated software (note that some hardware may be required, but costs for this aspect are generally less than personnel or software needs). The level to which this is needed will vary significantly at each institution based on current staffing, software and hardware capacity, and whether or not institutional information systems are managed at the state (OUS) or local levels (community colleges). As a point of reference, the typical cost of purchasing an integrated, complete information system for a mid-size college is approximately

\$500,000 - \$1 million and generally requires three to five staff during the implementation, let alone other systems that may be needed.

This report addresses the actual cost of converting courses, certificates, and degrees elsewhere, but should be noted that software systems to manage such processes range from \$20,000 – \$100,000 depending on complexity and size of institution. If a system was purchased and used on a statewide basis, the anticipated cost is significantly higher.

Registrar's Office

At most institutions, the Registrar's Office serves as the front line for implementing academic and other campus policies. Representatives from the Registrar's Office should be involved in a variety of semester steering committees; possibilities include curricular changes (course, certificate and degree changes), academic calendar, and academic policies.

Tasks: The registrar's office is generally responsible for helping to inform decisions regarding academic policies and comprehensive curricular changes and then working with IT to make sure those policies are automated via the institution's information system. A partial listing of affected policies and practices include:

- Course, certificate, and degree changes
- Academic calendar, including term start, stop and finals dates
- Registration dates, including associated add, drop, grading and refund policies
- Transfer credit policy, including 2+2, CLEP, AP, IB, CPL, CEU, challenge by exam
- Administrative withdrawal/attendance
- Transfer credit evaluation
- Degree evaluation, degree audit system, connection to ATLAS
- Grading deadlines and policies (e.g., incomplete, repeat grades, grade changes)
- Academic warning/probation
- Institutional reporting dates
- Veterans' certification dates
- Changes to transcript key
- Articulation tables
- Class scheduling

At community colleges, this oftentimes includes admissions dates and deadlines, orientation, residency, placement testing, and other "getting started" policies.

Cost and Personnel: It is important to note that many of the above policies and practices are ones that require cross-campus discussions to determine how to best approach each of these areas; significant time is needed to allow these conversations to happen, both individually and collectively, and then program information systems to automate associated processes. As such, it is anticipated that small to mid-size institutions will need one to two additional registrar office staff to manage the transition, while larger institutions may need as many as five additional staff (as an example, the University of Cincinnati brought on between three to seven

additional staff at a variety of different stages of their semester conversion project). The degree to which an institution's registrar's office will be affected will also be determined by their level of involvement with course and program changes, as well as with course scheduling.

Additionally, the registrar's office is generally the front line for maintaining (and/or implementing) a degree audit system. As mentioned in the IT section, an institution may incur additional costs if a degree audit system is not in place. Regardless, additional skilled degree audit programming staff are required if an institution is to fully operate during the transition from quarters to semesters, as well as assist with the programming needed for the transition itself.

Academic Advising

The student group most affected by these changes is those students who enroll under both calendars. Experience by other institutions shows that this population of students tends to ramp up their credit load in the terms immediately prior to the conversion in order to complete remaining requirements under the quarter calendar (Northeastern University, University of Minnesota, and University of Tennessee). Additionally, the students who are not close enough to complete remaining requirements need to adjust their schedules to accommodate the new credit blocks and certificate or degree requirements. Both groups will need significant attention to best manage the transition and not register for unnecessary coursework.

Given the above, it is imperative that institutions develop a comprehensive student academic advising campaign—one that covers the entire transition period—at the outset of a conversion process. The failure to deliver effective and timely advising will put an institution at risk of negatively affecting a student's academic experience and career or graduate school aspirations. Some institutions that recently completed the conversion process required that *all* current students, in conjunction with an academic advisor, develop an academic plan that helps steer them through the conversion. In all cases, a significant increase of advising assistance was necessary during the transition process. As an example, the University of Cincinnati determined that they needed an additional 91 advisors in order to help students successfully navigate this change.

Tasks: In addition to the on-going work of advising, advisors (both professional and faculty) may undertake the following tasks:

- Formation of an institution-wide advising committee to help steer process and address necessary policies
- Determine of need for additional advisor staffing
- Develop strategies for advising students in creating customized certificate or degree plans
- Advisor training
- Development and dissemination of advising materials

Personnel: Advising requirements and organizational structures vary widely at each institution. For example, some institutions have mandatory advising, while others do not; some institutions utilize full-time professional advisors, while others share the workload between professional and faculty advisors. Regardless, a change to semesters will require the institution to examine its advising model and determine the best way to staff its advising pool for a transition.

Institutions with a robust degree audit system (e.g., DegreeWorks, DARS) are less likely to require additional advising personnel, as degree completion plans are available through the degree audit system. However, it is important to note that additional degree audit personnel—who require extensive training prior to coding audit systems—will be needed to program the system and help communicate information to students.

Costs: Advising costs may be three-fold, depending on an institution’s situation: an increase in advising personnel, addition of a degree audit system, or both. There is no doubt that additional advising staff will be required, although the actual number will depend upon the current student-advisor ratio, the availability of a degree audit system, and institutional advising requirements. To pull from a prior example, the University of Cincinnati invested \$5 million dollars to fully staff its advising needs during a five-year transition period.

Human Resources

The primary impact to institutional Human Resources offices will be in the administration and oversight of employee contracts and labor agreements. While many institutions have exempt employees, the majority of institutions have different employee groups affiliated with a union or other association (generally classified staff and faculty). A shift to a semester calendar will require a thorough review and renegotiation all labor agreements, which can be a time intensive endeavor.

Renegotiation of labor agreements will also include pay for part-time employees, part-time instructors, and adjunct instructors as their agreed upon pay amounts are currently determined based on a quarter calendar. And, as with all other campus departments, all human resources policies and procedures will need to be adjusted should a new calendar be adopted.

Personnel and Costs: It is anticipated that the contract negotiation process can be managed by existing staff, noting that most negotiations cannot happen until the year prior to the conversion as currency of economic and state budget information has a significant impact on contract financial language.

Other Student and Administrative Areas

Virtually all departments within an institution will be affected to a variety of different degrees under the conversion from a quarter to semester calendar. As such, below is a listing of other student services and administrative areas impacted, including a partial listing of tasks. In addition to those items listed below, all areas will need to update any forms, documents, brochures or web pages in which a quarter calendar is referenced.

Area	Potential Tasks
Recruiting	<ul style="list-style-type: none"> - Communication plans - Campus visit calendar - Recruiting calendar - Marketing materials - Orientation schedule
Admissions	<ul style="list-style-type: none"> - Admission deadlines - Special/cohort admission programs - International student application processes and deadlines - Transcript evaluations (course-to-course) significantly impacted
Financial Aid, Veterans Benefits and Scholarships	<ul style="list-style-type: none"> - Cost of attendance - Award calculations, packaging philosophies - Disbursement scheduling - Return of Title IV funds calculations - Student employment/work study contracts - Federal reporting - Satisfactory Academic Progress policy - Veterans certification dates/deadlines - Certificate and degree approval by State Veteran Coordinator - Scholarship award process - Longer breaks between terms also means changing student behavior in terms of budgeting for these periods – would necessitate a greater level of outreach or education on this topic.
Student Accounts/Bursar (includes tuition and fees):	<ul style="list-style-type: none"> - Tuition and fee structure - Billing and refund dates - Collection, late payment and late fees - Fee waivers - Student insurance
Athletics	<ul style="list-style-type: none"> - Event/competition calendar - Reporting requirements
Student Life <ul style="list-style-type: none"> - Student Government - Student Newspaper - Housing - Student Activities - Multicultural Student Services 	<ul style="list-style-type: none"> - Student leadership training calendar - Annual events and traditions calendar - Student housing contracts
Institutional Research	<ul style="list-style-type: none"> - Institutional, state and federal reporting calendar and deadlines - Need to create some level of translation for quarter versus semester data – may impact longitudinal analyses
Placement Testing, Personal Counseling, Disability Services, Bookstore, Library	<p>It is anticipated that these areas will need to change relatively few deadlines, policies or practices. More often than not, these (and other areas listed in this section), report that a conversion to semesters will result in fewer processes throughout the year.</p>

Academic Issues for Faculty and Students

Program Changes

Each major, minor, and certificate and degree program would have to convert from quarter requirements to semester. There will be heavy faculty workload involved in redesigning each program, mostly at the departmental level but some interdisciplinary programs would involve multiple departments as well. However, this could be viewed as an opportunity to revise/update/initiate/discontinue some programs. In fact, one of the more consistent refrains heard from institutions from other states concerns the utility of this element of semester conversion. At the same time, this element of a semester conversion is the most time intensive and requires an enormous amount of work on the part of faculty members, registrar offices, and others involved with curricular changes. Moreover, some programs such as music performance might have difficulty scheduling students' required performances on a semester system, requiring a major overhaul not only of courses but of program requirements.

Also of note, the Oregon University System and Community College statewide oversight bodies would need to decide how much internal autonomy campuses would have and what changes would need to be approved at the state- or System-level. If the same level of state involvement is to continue in approving curricular changes, then additional staffing with OUS and CCWD may be needed. Without question, each campus will need additional staff dedicated to the conversion.

At the community college level, the schools are nearing the completion of a multi-year process of shifting some lower division collegiate courses from three to four credits and accompanying program requirements changes; the potential for faculty burnout on transformations is a realistic concern.

Course and Curriculum Changes

Some course/curriculum shifts will also be tied to graduation degree and general education requirements. It might be necessary to set up special/ad hoc curriculum committees on each campus (apart from the standing committee) to handle the workload of program and course and curriculum changes. Several states converting to semesters set-up such special curriculum committees. A considerable amount of work will be needed to revise a myriad of forms and documentation—both electronic and paper—concerning course/curricular/ and program changes, and additional clerical assistance at every level, from departments through provost, would be necessary. These activities could also require course release(s) for faculty to be in charge of the process in each department, division, program, and/or college.

Preparation and costs for lab-based classes would be decreased under a semester calendar, as start up needs would be reduced from three per year to two for sequenced lab courses in such areas as biology, chemistry, and physics.

Graduation Degree Requirements and General Education Requirements

Because this element is campus- or college-wide, a separate committee may be needed to review overall degree and general education requirements; in fact, some Systemwide changes in other states have convened a statewide task force to promote cohesive offerings at the lower-division levels. On each campus, this could also initiate a broad review of graduation and general education requirements to address changes resulting from a move to two terms from three. Across the university and community college systems, the change may represent an opportunity to address existing transferability problems and issues related to AAOT³, OTM⁴, AP⁵/CLEP⁶/IB⁷. At the same time, a great deal of this type of cross-sector work has been ongoing via the Unified Education Enterprise. Regardless, such an analysis should be done prior to individual course and program changes so as to incorporate graduation and general education requirement course adaptations at the department level.

Academic Schedule, Including Summer Student Work Impact

For some, it is viewed as essential that the same schedules exist amongst K-12 and higher education and that all public postsecondary institutions in the state convert their academic calendars at the same time. One challenge cited in interviews concerned child care for students, faculty, and staff should fall term start prior to the beginning of the K-12 school year. The resource team recommends consideration of the potential impact a calendar change at the college level would have on the K-12 institutions in the state.

Options for semester length and configuration include:

- 14-15-16-week term [+1 finals week per term]
- August start vs. early September vs. mid-late September;
- 3-4-week intersession/short term in January.

Credits generally are based on 50-60 minutes per week of student/faculty contact per credit hour, so that the length of the term will affect standard credits per course and length of class time blocks. The very short turnaround from winter quarter to spring is one of the most difficult components of the quarter system, especially for financial aid, registrar, and faculty preparation of spring courses; a semester system would mitigate that ongoing problem.

Will summer session be a ‘third semester’ or will it be primarily an intensive/reduced timeline? Summer dates must somehow coincide with K-12 calendars to allow for teacher enrollments. Many community colleges offer short courses during the year as well and the timing for these,

³ Associate of Arts Oregon Transfer

⁴ Oregon Transfer Model

⁵ Advanced Placement

⁶ College Level Examination Program

⁷ International Baccalaureate

with the accompanying faculty workload adjustments, would offer some special challenges. Even with, say, a 10-week summer term, schools could build in 5-week super-intensive courses to the schedule (now the norms are 4-, 6-, and 8-week condensed summer classes as well as 11-week full-term classes). Some programs may opt to offer half-semester courses during the year to retain some flexibility and focus.

Faculty Workload

Faculty's current assignments are based on three quarters of 10 weeks per quarter plus one week for finals and, on some campuses, workload is set by union contract. It should be noted that some community colleges operate on an 11-week plus one week for finals for fall term only. Workload redistribution thus becomes tied to contract negotiations and several survey comments indicated concern with union issues including uncompensated work on conversion tasks. Some out of state institutions provided a summer compensation package and certainly release time for faculty to devote time to conversion. For the Oregon University System institutions, the Systemwide sabbatical policy would need to be changed. One question that arose in the research concerned whether faculty could designate, for example, a spring and summer work year instead of fall and spring? This might make sense, for example, in Education departments with heavy summer enrollments. Other policy and practical changes would include: course releases and reassignments, adjunct assignments, and course enrollment caps (limited to some extent by facilities). Several other state and institution reports noted that the academic support atmosphere was "less hectic" with two terms, due to fewer advising and registration periods.

Three- vs. Four-Credit – Student Workload

While there is no firm evidence as to the intrinsic value of quarters vs. semesters with respect to student learning, the pace of semester vs. quarter courses is generally slower and allows students additional time to complete assignments and be engaged in integrative projects that require a firm basis of knowledge to complete. Faculty teaching graduate courses especially commented that semesters offer a fuller research experience. Capstone experiences may be better developed over a semester calendar. Overall workload for a student over the course of an academic year should be equivalent between quarters and semesters. Course sequencing will have to be carefully considered to ensure students can graduate in a timely manner. In addition, community colleges are especially concerned with how this might affect the opportunities for students to enter both Career Technical Education programs, as well as lower division transfer courses.

It would be assumed that in a semester-based calendar, one-third fewer courses would be required in a student's curriculum. Some of the current community colleges and universities have adopted a four-credit/course model and it has been suggested that substituting a three-credit semester course for a four-credit quarter course is one option for institutions to follow. For those institutions that have such a four-credit model (3-4 courses per term), 45 courses are required to complete a typical degree program ($45 \times 4 = 180$ credits). On a semester basis, if

courses are converted to three credits, 40 courses (five per semester) would be required to complete a degree program ($40 \times 3 = 120$ credits). A question arises as to whether or not this is an efficient approach to curricular offerings. Also, it is doubtful that those institutions that focus currently on three-credit courses would downsize their courses to two semester hours. Most likely, all institutions would need to invest effort in a comprehensive curriculum revision process that would determine an appropriate mix of three-, four-, and five-credit courses.

Two Types of Credit Conversion

Typically, when converting from a quarter to a semester calendar, the curriculum reconfiguration is done in one of two ways: the *constant content* or *constant format* model.

Constant content method: In this format, course content stays the same, but since it is spread over a longer period of time, the number of credits awarded per course is reduced. In this model, the content of a quarter-long course would remain the same on a semester calendar, but it would be spread over the longer semester term (typically through reducing the number of weekly contact hours). A four-credit lecture course meeting four hours a week over a 10-11 week quarter is essentially equivalent to a three-credit lecture course meeting three hours a week over a 15-16 week semester. Therefore, to accumulate a sufficient number of semester credits to graduate with more than 120 credits, the semester student needs to take at least five three-credit courses per semester. Assuming that new faculty are not hired, this puts the typical faculty load at three to four, three-credit courses per semester (Mayberry, p. 11).

Constant format method: In this approach, semesters courses maintain the same credit-hour value as on the quarter system, but course content is increased. Since it is not difficult to divide a full year's content by two rather than three, this approach works well for full-year sequences. For stand-alone quarter courses, content is expanded to fill the semester term. Institutions with a majority of four-credit courses, the constant format model requires no change in the typical load of a student. The typical load remains four courses at four credits during each semester. This is a one-third annual reduction of courses, but no reduction in content. Similarly, under this approach, faculty teaching load would decrease by one-third (Mayberry, p. 11).

Student-Teaching & Other Cooperative Arrangement Issues

Careful consideration is needed with respect to calendar differences between K-12 and college and university schedules for activities such as student teaching. Whereas the current academic calendar of community colleges and universities begins about three weeks later than K-12, they end roughly about the same time in June. Conversion to a semester calendar will reverse this order with the start time of both education sectors about the same and the community colleges and universities ending about a month earlier than K-12. Given that most of the private colleges in the state are currently on semesters, we have existing models to build upon. In addition, the length (# of weeks and hours per week) of internships, practica, and other cooperative work experiences will need careful scrutiny should a conversion to semester credits take place.

Faculty Research Issues

Many *faculty* at research universities (OSU, PSU and UO) have a "research quarter" where they primarily focus their efforts on research projects, grant writing and graduate student mentoring. Faculty with these appointments express concern that conversion to a semester calendar will reduce the time they have available and that research programs will suffer. Faculty with fieldwork elements to their research could also be negatively impacted by calendar constraints. However, many faculty commented in the survey that timing of professional

conferences and workshops are often based on the semester calendar and they are currently impeded from participation.

Issues Related to Promotion/Tenure

Particularly at the OUS level, the research issues mentioned in the previous paragraph are of considerable import. If conversion to semesters reduces research productivity, there could be negative effects on faculty success in accomplishing tenure and promotion. This could lead some faculty to seek employment elsewhere. Guidelines for promotion and tenure at each institution would need to be carefully revised to reflect the change in time commitments associated with new expectations under the semester system.

Projected Costs and Savings of Semester Conversion for Four Oregon Postsecondary Institutions

Southern Oregon University, Portland State University, Rogue Community College, and Portland Community College supported our research effort by agreeing to provide more detailed analyses of potential costs and savings of a semester conversion for their respective institutions. While all 24 public institutions in Oregon are unique, these four institutions represent both different sectors of the educational enterprise, as well as different sized institutions in the state. Although an exhaustive analysis of all 24 public institutions was beyond the scope of this particular study, we believe the representativeness of these institutions, as well as the consistent findings of their respective analyses, offer useful information in confronting the potential budgetary impacts of semester conversion.

Estimated costs and savings at each of the four institutions were correlated to two measures of students served—Headcount in Fall 2008 and Student Full-time Equivalent (FTE) over 2008-09. Details are in the Appendices [A2-1](#) (PCC), [A2-2](#) (PSU), [A2-3](#) (RCC), and [A2-4](#) (SOU): Semester Transitions – Community College and University Costs and Savings. Costs and savings at each institution as related to the measures of students served are as follows.

Institution	One-time Transition Cost	Cost/ Fall 2008 Headcount	Cost/ 2008-2009 FTE	Net Post-transition Annual Savings	Savings/Fall 2008 Headcount	Savings/ 2008-2009 SFTE
Portland Community College	\$7,340,000	\$181	\$276	\$224,400	\$6	\$8
Rogue Community College	\$1,984,675	\$237	\$389	\$(156,600)	\$(19)	\$(31)
Portland State University	\$5,599,580	\$200	\$270	\$950,000	\$34	\$46
Southern Oregon University	\$2,134,000	\$418	\$488	\$174,000	\$34	\$40

On the savings side, a negative savings (i.e., increased costs) were identified in several categories (e.g., loss of textbook revenue). At one of the four institutions, the overall savings

was negative (i.e., costs after conversion were estimated as being higher under a semester schedule than under a quarter schedule).

Costs and savings at the four institutions were projected to all 24 institutions on the same two measures of students served—Headcount in Fall 2008 and Student Full-Time Equivalent (FTE) over 2008-09.

Total one-time transition costs for all 17 community college and seven OUS institutions are estimated at between \$65,000,000 and \$70,000,000, while total net post-transition annual savings are estimated at between \$2,900,000 and \$3,800,000 per year.

Curricular Issues – OUS Provosts

Currently, many OUS institutions under the quarter system adhere to the four-credit hour standard. A conversion to a semester system would see a transition to a three-credit standard. Working on the premise that the current “seat time” requirements for a degree would be preserved, fewer courses are required in the semester model than in the quarter system. Therefore, faculty and all academic departments would need to redesign courses and the curriculum required to obtain a degree at both the undergraduate and graduate level. Since most programs offer a much larger number of classes than the minimum required to obtain the degree, this conversion process would be considerably greater than simply converting coursework required to obtain a degree. Without question, this curricular redesign process would necessitate an enormous amount of time and effort by the faculty, and this is work that cannot be “outsourced” or handled by other personnel. In addition to course and program redesign at the individual institution level, degree and certificate programs require review and approval at the System-level as well.

Still, at both Oregon’s public universities and community colleges three and five-credit courses remain in the status quo. Having said this, an ongoing discussion among the semester conversion resource team concerned the relevance of measuring academic progress using “seat time” as the metric. Some members of the group argued that in an era of outcomes-based education, and one in which many students take asynchronous courses online, the entire concept of measuring academic progress in this way is outdated. For some in Oregon’s community college sector, the logical extension of this argument is that the academic calendar is less important to overall productivity and pedagogy than is focusing on other issues believed to enhance student learning and degree attainment.

Nevertheless, some possible semester calendar benefits identified include a reduction in the frequency of required advising by faculty and a reduction in the number of class schedules that need to be developed by department chairs, faculty, and staff. Also, faculties from institutions or systems that have made the transition to the semester calendar point to the utility of the course redesign work. While it is very time consuming and painstakingly difficult, the analysis and re-visitation of the curriculum and programs could be a beneficial activity and include greater statewide consistency of course outcomes, content, and numbering.

Oregon University System Registrars, Admissions, Records, Advising, Financial Aid, Business Affairs, Disability Resource Center, Enrollment Management

Some of the perceived benefits of a semester calendar from administrative officers included a Career Center representative indicating that they may be able to better meet the requests of employers with the earlier fall term start date as the fall recruiting season is curtailed significantly in the quarter system. A representative of the Disability Resource Center observed that a semester calendar would permit more time to process information, that there would be more lead time to arrange for access, and that there would be a better pace for both the students and staff to complete their goals. One of the Deans of Students at a larger OUS institution thought there would be an administrative cost savings in comparison to the quarter system since there would be one less intensive period of term preparation. A representative from admissions, records, and registration commented that a semester conversion would require extensive planning, coordination, and focus and would necessitate at least one year of lead time as well. Moreover, this administrator observed that such a process would need to take priority over other initiatives and projects.

A list of some of the areas that would experience a workload reduction by elimination of one enrollment cycle identified in this survey of business function administrators includes:

- Admissions evaluation processing
- Term set-up for registration
- Class scheduling and room assignments
- Registration and resulting academic policy transactions
- Final grading
- End of term processes such as academic standing and Dean's List/President's List
- Graduation certification
- Veteran's certification

In addition, it was observed that:

Housing capacity and placements for spring starts would be more predictable and contract intake would be much more stable. The reduction in time spent completing the repetitive term-related tasks could be used to allow staff to:

- Develop new and improved technology solutions for enrollment and retention related goals and objectives
- Engage in more robust process improvement
- Improve customer service and response times
- Manage the required Banner upgrades more effectively
- Engage in more training and support activities with academic departments related to enrollment tasks

Preliminary Results of Academic Calendar Survey

The Resource Team set up an online survey at the Oregon University System website concerning semester conversion and publicized it to a wide variety of campus groups. The survey opened April 14, 2010, and closed June 1, 2010. The survey asks respondents if they support or oppose a conversion to a semester calendar for all Oregon public universities and community colleges. Complete survey results will be forthcoming.

The results below are as of May 19, 2010.

Organization	Total Respondents	Support	Oppose
Oregon University System Faculty	1,197	641	556
Oregon Community College Faculty	380	171	209
Oregon University System Staff/Administration	157	79	78
Oregon University System Students	3,884	1,200	2,684
Oregon Community College Students	142	50	92
Other (those not choosing any of the categories)	71	39	32

OUS and Community College Presidents

As members of the Resource Team, Blue Mountain Community College President John Turner and Southern Oregon University President Mary Cullinan informally surveyed their community college and OUS colleagues regarding semester conversion.

President Turner reports that the community college presidents have consensus on the following:

- 1) Conversion to semesters may have merit, but it is not urgent.
- 2) The estimated \$50 million is too much to spend at this time. A decision should be delayed on conversion until after the Community College Support Fund has gone up to about \$550 million.
- 3) If one community college converts, all should convert at the same time.

President Cullinan reports, "Of the seven OUS presidents, six believe that a semester system would provide a better calendar for teaching, research, and collaboration activities. All seven are concerned about the financial impact of such a change in a difficult economy, and most do not see the conversion as a priority at this time. The presidents did not indicate that all seven institutions should necessarily be on the same calendar."

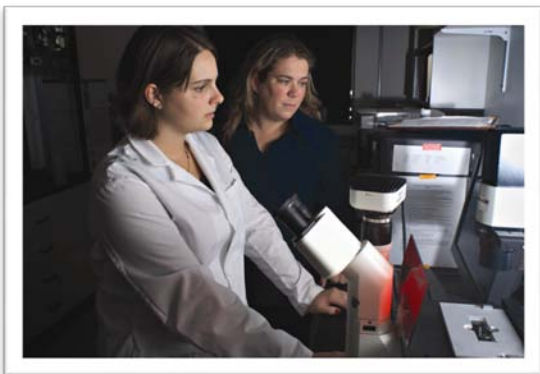
Resource Team Recommendations

Should semester conversion take place, the state and institutions must make a commitment to not allow the change to delay a student's progress towards graduation. To make such a guarantee, the following are critical to a successful conversion process:

- The substantial up-front costs and increased personnel necessary for a calendar conversion need to be supported by legislative appropriations and cannot be absorbed within current operating budgets.
- A conversion process should be a minimum of three years and preferably a four-year process from start to finish.
- A majority of the resource team recommend delaying any calendar change of this magnitude until student demand has leveled off and state support is more robust. All public institutions report struggling to keep up with the current demand in an historically resource-challenged environment.
- The change to semesters should include a fully-staffed conversion office to oversee the entire process. Institutions that have had successful conversions consistently point to the importance of having a full-time executive level administrator, at least one full-time staff assistant, and a highly discretionary conversion budget that rolls over annually for the duration of the conversion (Mayberry, p. 8).

A majority of the resource team believes that a semester conversion in Oregon should be an all or nothing proposition. In brief, all public postsecondary institutions should convert simultaneously, thus maintaining calendar consistency among Oregon's public institutions of higher education.

Notably, President Mary Cullinan reports that her institution is very supportive of converting to a semester calendar and would welcome the opportunity to pilot a semester academic calendar in Oregon with adequate financial support. Such an effort would include working closely with Rogue Community College and other feeder institutions to ensure smooth transitions for students.



SECTION 1.2 – JOINT BOARDS STUDY OF RURAL ACCESS AND SUCCESS

Section 1(2) of Senate Bill 442 from the 2009 Oregon Legislative Assembly states:

The Joint Boards of Education shall conduct a study of approaches to increase student enrollment and student success for rural residents of this state at institutions of higher education listed in ORS 352.002 and community colleges. The Joint Boards of Education shall submit a report of its findings and recommendations concerning structural, legal, funding or other changes necessary to effect such an increase to the appropriate interim legislative committees on higher education prior to October 1, 2010.

A study group for the Joint Boards of Education was created to research the rural issues and submit a report to the Joint Boards. The study group included:

George Pernsteiner, Chancellor, Oregon University System
Camille (Cam) Preus, Commissioner, Community Colleges & Workforce Development
Rosemary Powers, Oregon State Board of Higher Education, and Professor, Eastern Oregon University
Nikki Squire, Oregon State Board of Education
Bob Davies, President, Eastern Oregon University
Chris Maples, President, Oregon Institute of Technology
Jim Middleton, President, Central Oregon Community College
Edward Ray, President, Oregon State University
Patty Scott, President, Southwestern Community College
John Turner, President, Blue Mountain Community College

In addition, the group contracted with Oregon State University Extension on behalf of the Urban/Rural Connections faculty working group to conduct a series of seven community



meetings in rural areas of Oregon. The leads on this were Beth Emshoff and Stephanie Hallock. A report summarizing their findings is in the [Appendix B](#) to this report.

Background

The Governor, legislature, business community, and the education sectors have challenged Oregonians to raise the bar for educational attainment, and establishing what has become known as the 40-40-20 goals. The goals include:

- 40 percent of Oregonians earning a four-year degree or more (currently 28.3 percent)
- 40 percent earning a post-high school certificate (currently 26.5 percent)
- 20 percent earning a high school diploma or equivalent (about 12 percent of Oregonians do not have a high school diploma today), and prepared to enter the workforce

In Oregon’s urban counties, the bachelor’s degree attainment rate is 31.3 percent. This is considerably higher than in the state’s rural counties where the rate falls as low as 11 percent.

According to 2008 Oregon Employment Projections for the decade of 2006–2016, nearly 74 percent of high-wage job openings in Oregon through 2016 will require competitive applicants to hold at least a bachelor’s degree. And in the fields of agriculture, timber, recreation and many others, technological changes and global competition require workers to obtain a higher level of education today than they did just 10 years ago. This lower rate of educational attainment can be attributed largely to the many barriers rural Oregonians face. These barriers include, but are not limited to: limited geographical access to Oregon’s public universities, affordability, cultural or social barriers, and insufficient assistance to pursue higher education, including financial aid and academic preparation and support.

Rural College Participation

In 2007, about 20 percent of public high school diplomas were awarded to rural students, but only 165 of OUS first-time freshmen who enrolled the following fall were from a rural county. This means that students from rural high schools are 24 percent less likely to participate at an OUS institution than are their urban counterparts. For the high school graduating class of 2005, 37 percent of rural high school graduates did not attend any type of college by the winter after graduating high school, compared to 25 percent of urban students.



Key Barriers to Education for Rural Students

Three significant obstacles many rural students face include:

Income: Per capita income is lower in rural regions of the state, making it harder for parents to afford college for their children. Improved funding for the Oregon Opportunity Grant represents the single largest initiative to increase access to college for low and moderate income Oregonians.

Distance: For many rural Oregonians, the closest university can be several hours away and rural students' lack of exposure to a college setting can be a major barrier to attending college. Distance can also be a barrier for students wishing to attend a community college.

Familiarity: A lack of communication between colleges and rural high schools and communities can result in limited or no guidance for application, college selection, and financial aid opportunities. In addition, many rural students are the first in their families to go to college.

Current Efforts on Community College and OUS Campuses

Surveys of Oregon's 17 community colleges and 7 public universities were conducted, to obtain a better understanding of current educational efforts to serve rural students and increase their access and success in public postsecondary education in Oregon. A wide variety of pre-college, recruiting, retention, and other efforts exist at all the campuses. All of the state's community colleges view themselves as serving a segment of the population of rural students. At the time of this report, with record enrollments at the community colleges, few identified vigorous efforts to try and increase their numbers, rather they were seeking to serve the large number of students on their respective campuses. An attachment to this report summarizes existing campus efforts.

Town Hall Forums and Other Public Input

In order to inform the group's work, a series of town hall forums and supplemental meetings in rural areas of the state were arranged. The purposes of the meetings were to: 1) collect information and engage in a deliberative dialogue with rural residents in a face-to-face setting; 2) obtain feedback on some of the initial proposals that have emerged from the group's work. Forums and meetings were held in Madras, Gold Beach, Burns, Brookings, La Grande, Warm Springs, Lakeview, and Newport. ([See Appendix B](#)).

Group Proposals on Rural Student Access and Success

Meetings of the 10-member group led to a series of recommendations for potential actions to strengthen rural resident participation and success in postsecondary education in Oregon. Several policy recommendations were forwarded on behalf of the Joint Boards of Education to the Oregon University System's Academic Strategies Committee (ASC) in February 2010.

Included in the appendix of this report are matrices displaying a list of recommendations seeking to achieve two primary goals: 1) strengthening the college-going culture in rural areas and 2) improving program completion and credential attainment. A bulleted list of the resource team's recommendations follows:

- 1) Actions to strengthen college-going culture in rural areas
 - Increase investment in proven pre-college outreach programs: Increase ASPIRE sites statewide (with priority in rural areas) from 115 to 210. Invest in GEAR UP to add 10 clusters serving middle and high schools
 - Promote availability of Dual Credit Option through state loan forgiveness initiative as incentive for subject-area M.A.'s agreeing to teach in rural schools
 - Increase pre-college advising skills for middle and high school teachers/counselors by funding summer institutes at colleges and universities
 - Promote student/parent ambassadors for rural middle and high school visitations
 - Increase collaboration among community colleges and universities in rural school outreach (travel funds for college/university visits, training for outreach staff)
 - Increase outreach efforts in rural communities for "adult" learners by increasing access sites and opportunities for gateway/introductory courses

- 2) Actions to improve program completion and credential attainment
 - Develop new regional "open campus" processes and agreements with financial support for the Eastern Oregon Collaborative Colleges Consortium and for the OSU/TVCC/COCC Madras and Prineville campuses for developmental education
 - Apply a "hub-and-spoke" education model through enhanced rural broadband infrastructure and fiscal support for several rural access points (e.g., extension offices, libraries, K-12 schools). Pilot gateway/introductory courses anticipating small classes

With a focus on the need to strengthen college-going in rural areas, one of the first recommendations was to increase investment in pre-college programs. Specifically, the group recommended building upon programs that have achieved success and possess evidence of efficacy in their respective missions. Thus, the group has recommended increased investment in the ASPIRE and GEAR UP programs.

ASPIRE (Access to Student Assistance Programs in Reach of Everyone) is known as Oregon's official mentoring program. The program supervises volunteers who help counselors and advisers with information about college options, financial aid, and other relevant information in about 115 schools in Oregon reaching over 11,000 students. The ASPIRE Director has identified 95 additional sites where schools have already indicated the necessary interest and support for ASPIRE programs.

GEAR UP (Gaining Early Awareness and Readiness for Undergraduate Programs) offers college readiness programs for low-income students in rural communities currently in 20 middle and high schools in Oregon. Investment in GEAR UP would increase the number of GEAR UP clusters by 10.

An additional recommendation of the group as a means of strengthening college-going in rural areas is to support summer institutes at colleges and universities for teachers and counselors responsible for advising middle and high school students in Oregon. While the American School Counselor Association recommends a 250:1 counselor-to-student ratio, Oregon ranks 41st in the nation with a 485:1 ratio (National Center for Education Statistics, January 2010). A recent report from the Western Interstate Commission for Higher Education (WICHE) and the Gates Foundation entitled, *“Can I Get a Little Advice Here? How an Overstretched High School Guidance System is Undermining Student’s College Aspirations,”* clearly demonstrates the significance of the problem, and how detrimental of an impact it is having on postsecondary aspirations and success.

Note: In June 2010, the above proposals and recommendations were further incorporated into a set of ASC funding recommendations to the Oregon State Board of Higher Education for 2011-2013 in five broad categories: creating a college-going culture for under-represented students, improving student outcomes, preparing for a diverse world, serving Oregon with regionalized approaches, and strengthening critical areas of Oregon’s economy. While only proposals in the last of these five categories ended up in final OSBHE Policy Option Packages, there has been ongoing dialogue with university presidents about campus commitments to some of these efforts in the next biennium. Also related to the above recommendations, the State of Oregon received a one year, \$1.5 million federal College Access Challenge Grant in August 2010 to expand ASPIRE sites significantly and award sub-grants statewide for expansion of pre-college programs in areas that serve under-represented students in higher education, including rural areas. Grant renewal is possible for up to five years. GEAR UP expansion may also be possible in 2011 due to a collaboration in progress between OUS and The Ford Family Foundation, also with a potential rural focus.



SECTION 1.3 – OSBHE STUDY OF ENROLLMENT MANAGEMENT FUNCTIONS

Section 1(3) of Senate Bill 442 from the 2009 Oregon Legislative Assembly states:

The State Board of Higher Education shall conduct a study of the combination of enrollment management functions into a single office at each state institution of higher education listed in ORS 352.002 whose enrollment is less than 7,500 full-time equivalent students as defined by the board. The board shall submit a report of its findings and actions to the appropriate interim legislative committees on higher education not later than October 1, 2010.

State institutions of higher education (i.e., state universities) covered by this section with FTE enrollment below 7,500 students include Eastern Oregon University, Oregon Institute of Technology, Southern Oregon University, and Western Oregon University. The study of combination of enrollment management functions at these universities is an outgrowth of the findings of a “shared services study” conducted by MGT America, consultants to the Oregon State Board of Higher Education, and by the subsequent work of an OUS working group, led by Vice Chancellor Jay Kenton, to identify efficiencies in administrative functioning on the campuses. Below is a summary of efforts on each of the four campuses to examine and—where feasible—streamline enrollment management functions, specifically the offices of admissions, financial aid, and registrar.

Eastern Oregon University

Enrollment management functions were consolidated under a single Dean of Enrollment Services in the fall of 2009. The directors of admissions, financial aid, and registrar’s office all report to this Dean. Inlow Hall (the administration building) is completing a renovation that will allow all three functions to be co-located on the first floor, including a Welcome Center that will be staffed by one or two cross-trained employees who are knowledgeable about all three enrollment functions as well as other programs and services available to students on the EOU campus. While it is not anticipated that administrative positions will be eliminated when the co-location is complete, it is anticipated that current staffing levels will be adequate to meet the needs of significant enrollment growth that EOU is currently experiencing, both in terms of new students to the university and in terms of higher student retention and thus growth in the number of students who continue their studies without interruption.

Cross-training is also in progress for admissions office and registrar staff so that individuals formerly specializing in on-line applications and registration and those specializing in on-campus applications and registration will be to assist each other in other to prevent or ameliorate processing delays students would otherwise experience. As with the Welcome Center staff, here as well the university will be able to accommodate employment growth with

a small, stable number of administrative staff. Closer collaboration between admissions and financial aid through co-location and the above-mentioned re-organization has also led to closer alignment of financial aid awarding and the university's enrollment management plan. While outside the narrowly defined scope of enrollment management in this study, a related function at EOU (that of academic advising), has also been re-organized into a unified advising model for students.

Oregon Institute of Technology

In 2005, OIT implemented a matrix approach to enrollment management, with over-arching responsibility for ongoing implementation of a strategic enrollment management (SEM) plan assigned to the vice president for student affairs & enrollment management. Organizationally, admissions and financial aid reported directly to that position, while the registrar reported directly to the provost. Since the registrar at OIT also has significant responsibilities for ongoing academic partnerships with community colleges, OHSU, and private universities, this reporting structure makes sense. It is also the case – both here and at OUS institutions generally – that registrar functions are becoming increasingly “virtual,” offering 24/7 service to students via the internet that include registering for classes, adding and dropping classes, checking grades, and requesting transcripts.

The University's master plan, and thus the OUS Capital Construction Plan, continues to call for the construction of a student services building that will allow consolidation of all three enrollment management functions. Funding has not been secured for it, however. Admissions and financial aid offices, on the other hand, are co-located in a high traffic area of the College Union building, and staff are cross-trained in some functions. For example, financial aid staff make recruiting trips on behalf of admissions and staff in both offices can answer students' basic questions about both admissions and financial aid. With the Vice President's departure in 2008 and the appointment of a new vice president and dean of students, SEM responsibilities have been under study.

Southern Oregon University

SOU eliminated nine administrative positions in enrollment management areas as a result of re-organization in 2009-2010. An Enrollment Services Center was created whereby admissions, the registrar, financial aid, and student accounts all report to an assistant vice president for enrollment. Through the re-organization, front-office staff were cross-trained as Enrollment Services Associates (ESAs) who served students needing assistance in registering for classes, applying for and receiving financial aid, paying tuition and fee bills, and registering for a parking permit. The offices were physically co-located as well, into renovated space in Britt Hall (the administration building at SOU). While not cross-trained per se, staff in back-office positions were instructed to become more collaborative so students could be better served and less likely to get a “run-around” as can occur when staff functions are unnecessarily specialized.

In addition to physical co-location and cross-training of staff, a web portal was implemented whereby students could perform many enrollment-related functions via the web without needing to come into the office. With one web portal log-in, students can now check the

balance of their student accounts, pay tuition and fee bills, register for (and add and drop) academic classes, and purchase parking passes. The log-in is the same one the students use for on-line and hybrid classes that make class materials available to students electronically with the Blackboard application.

Western Oregon University

All enrollment management functions report directly to the associate provost, who reports directly to the provost. Through this consolidation of functions, enrollment policy, practice, and budgets are aligned to maximize attainment of WOU's enrollment goals. Staff in admissions, financial aid, and the registrar's office meet frequently and are cross-trained to the extent possible. "Cross-pollination" has occurred frequently; for example, a financial aid counselor moved to that position from the admissions office and two registrar staff persons also came from admissions. Physically, space limitations prevent the consolidation of all three operations currently, although admissions and financial aid offices are co-located in the same building as the Associate Provost's office. Major renovation of an existing building or construction of a new building would be necessary for physical consolidation to occur.

Combination of Enrollment Management Functions: Conclusion

Combination of enrollment management functions at OUS regional institutions and the Oregon Institute of Technology has occurred to the extent feasible at present, both organizationally and physically. In some cases, staffing levels have been reduced, in others stabilized to serve growing enrollment. In all cases, staff has been cross-trained to better assist students. Capital construction would further allow consolidation on campuses where co-location of enrollment management functions is not currently feasible.



SECTION 1.4– OSBHE REVIEW OF MISSIONS AND PROGRAMS

Section 1(4) of Senate Bill 442 from the 2009 Oregon Legislative Assembly states:

(a) The State Board of Higher Education shall review the missions and programs of each institution of higher education listed in ORS 352.002 and shall direct implementation of the following measures:

(A) Elimination of unnecessary duplication of programs in high-cost disciplines, areas of low student demand and graduate level education; and (B) Collaboration among universities to provide education programs to students in all parts of this state. (b) The Board shall submit a report on changes to the institutions' missions and programs to the appropriate interim legislative committees on higher education not later than October 1, 2010.

The initiative in this section of SB442, a review of institutional missions and programs to reduce duplication and enhance collaboration, was delegated by the State Board of Higher Education to the Oregon University System's Provosts' Council in December 2009. The Board judged this council of the chief academic officers of each of the OUS institutions to be most qualified to evaluate their institutions' academic offerings. As of the due date of this report, the Provosts' Council has initiated and is continuing the process of defining and prioritizing each institution's programs, establishing measures of the effectiveness of these programs and of drafting a process by which all institutions will routinely evaluate the value of continuing to offer specific programs.

The Provosts' Council agreed at the outset that this work must begin with an examination, not of the mission statements of each of the institutions, but of the core functions and essential activities conducted by each of the institutions. Only after these activities were established could realistic evaluation be made of the mission statement that describes the institution to the outside world, the programs by which each institution fulfills this mission, and the metrics by which to gauge the success of the institution. Establishing the elements essential to each institution provides the foundation that is an absolute requirement for the construction of a functional plan for any necessary modifications to the mission statement and programs at each institution. This approach will be extended to an examination and potential alteration of each institution's performance measures.

Premises

During the work of reviewing the institutional missions, the Provosts' Council made use of the Portfolio Concept, in which each institution is viewed as one element in the educational portfolio that is the Oregon University System. In this construct, it is the entire portfolio and not a single institution that serves the educational needs of the entire state. A final consideration

that guided this work is that each individual institutional mission must be in at least partial alignment with the various aspects of the OUS mission and goals.

1. The OUS mission ([in Appendix C](#)) is complex. Various aspects of its mission require different types of educational processes and institutions. In total, the missions of the institutions must cover the aspects of the OUS mission to the extent possible with current funding.
2. Each OUS institution is complex and contributes to multiple aspects of the OUS mission.
3. The current institutional mission statements come from different planning styles, formats, and constituencies, making it difficult to recognize relationships beyond a single campus. Rather than work directly with institution mission statements, the Provosts' Council approach is to create a "translation" that presents the OUS portfolio clearly.

The OUS mission and goals is the guide for the institutional missions. However, the institutions have multiple stakeholders and the need to attend to these varied constituencies may lead to missions that extend beyond the OUS scope.

Aspects of the OUS Mission

Individual aspects of the OUS mission are achieved by one or more institutions committing themselves to each aspect. From the OUS mission and goals, the Provosts' Council extracted three sets of mission aspects that are shared by all institutions and are critical to the educational and economic development aspirations of the state.

1. Undergraduate Access. This mission aspect is essential for OUS Goal #1, "...ensuring access for all qualified Oregonians to quality postsecondary education." Undergraduate access is accomplished because, though there are differences in the student populations served by each OUS institution, the System formed by the institutions serves all Oregon students.
2. Program Mission Intensity. This aspect indicates the academic programs at each institution and addresses OUS Goal #2 "...ensure high-quality student learning leading to subsequent student success." This aspect includes programs integral to all university degrees and those programs unique to the specific degrees offered at a particular institution.
3. Innovation/Research. OUS Goal #3 "...Create original knowledge and advance innovation" is addressed very directly by this mission aspect and describes the nature of research at each institution.

The unique expression of each of these aspects at the different institutions demonstrates the distinct manner by which the individual institutions contribute to the educational portfolio that is the Oregon University System.

The Provosts' Council is mapping the missions of each institution to the various OUS mission aspects.

It will be an annual process of the Presidents Council, Chancellor, and Board to review these mission aspects, to evaluate any changes and duplications, and to consider whether any actions should result from changes in the mission aspects. This review should also be incorporated into the annual performance measurement process.

The intent of the Undergraduate Access mission aspect is to ensure that taken collectively, the seven OUS institutions provide opportunities for access to higher education to qualified students for the entire state. It will indicate an institution's commitment to students from a specific region of Oregon since each institution primarily serves students from one or more of Oregon's specific geographic regions and focuses on students in and from those regions. Because some institutions have a draw of students to the institution from throughout the state, a "statewide" category of the Undergraduate Access mission aspect is used to reflect this level of institutional commitment and a "via distributed education" category will be used to reflect an institution's activity in and commitment to serving students through online or distance education. In its present form, the Undergraduate Access analysis contains entries indicating the importance, to each institution that it serves students in each of the following categories: 1a through 1f, 2 and 3:

1. Educated citizenry and economic development special to specific geographic areas of the state:
 - a. Portland metro region
 - b. Eastern Oregon
 - c. Southern Oregon
 - d. Central Oregon
 - e. Coastal Oregon
 - f. Willamette Valley
2. Statewide: educated citizenry and economic development (students not from the primary region of the institution)
3. Distributed Education: educated citizenry and economic development via distributed (online or distance) education

The Program Mission Intensity mission aspect addresses the OUS goal of ensuring high-quality student learning and reflects the array of broadly defined academic programs available to Oregon students at each of the OUS institutions. Upon completion, this analysis will indicate how each institution emphasizes each of the following categories. These are subject to future adjustment:

1. General education
2. Sciences
3. Humanities and social sciences
4. Engineering/technology
5. Natural resources
6. Healthcare
7. Business
8. Journalism/Communications/Digital media
9. Preparation of educators
10. Arts
11. Architecture
12. Law

The OUS Mission and Goal statement also includes a commitment to “...create original knowledge and advance innovation,” which is addressed with their Innovation/Research analysis. The elements of the Innovation/Research analysis need to be viewed in the larger national and international context to meet the Board’s goal of achieving globally competitive research. Further, definition of “innovation/research” is underway to address innovations in pedagogy as well as disciplinary research. The latest draft of the categories being considered includes the following:

1. Sciences
2. Humanities and social sciences
3. Engineering/technology
4. Natural resources
5. Healthcare
6. Business
7. Journalism/Communications/Digital media
8. Preparation of educators
9. Arts
10. Architecture
11. Law

Specific categories listed above for each of the three aspects of the OUS mission may change as the work is finalized over the next few months. Upon completion of this Mission Review, each institution will examine and use this information to determine metrics that it will use to demonstrate and verify completion of its mission.

Program Review

The mission of each institution is accomplished by the programs that it offers. Therefore, only upon completion of the Mission Review described in the preceding section can a realistic and credible review of the programs required to accomplish institutional missions be initiated. The Provosts’ Council and the State Board are committed to a Program Review Process that will fulfill the aspects of the OUS mission that mandate providing access to a quality postsecondary education for all qualified Oregonians.

Program Duplication Review

There are many aspects of the OUS mission that are necessarily covered by more than one institution. This duplication is necessary at some points, desirable at some points, and perhaps wasteful at some points. We believe there are multiple reasons for having duplicate coverage of a mission aspect:

1. It is necessary as part of the educational core at all comprehensive institutions (sustainability, general education, sciences, humanities, arts) and necessary to meet the expectations of accrediting agencies;
2. High demand may require similar programs in the same discipline at different locations;
3. Similar program titles may mask important differences and diversity in program content and approaches;

4. Multiple programs in a given discipline may be necessary to attract federal, state, and private funding not provided by the state.

A process for evaluating and acting on program duplication is currently being developed by the Provosts' Council that will guide academic program reviews at each institution. This work is being initiated by close examination of the processes at two OUS institutions that have terminated 35 programs in the last year. The experience of these institutions will inform the work of the Provosts' Council on the process of identifying internal program duplications and subsequent program consolidations and elimination. Of equal value to all Provosts' Council work will be the experience of these two institutions with regard to the campus conversations and response to program restructuring.

There are some common elements to the program reviews. Program evaluation begins by examining degree programs for consistently low numbers of students enrolled or earning degrees and consideration of the sustainability of the program in the current and predicted funding environment and the employment demands and social contributions of the discipline. Programs identified in this initial screen are then evaluated for their centrality to the institutional mission, typically by a group with some degree of cross-campus representation. It is worth noting that this mission centrality evaluation underscores the importance of a thoughtful, deliberative, institution-wide process, described in the second section of this report, of defining institutional missions. Some additional considerations during evaluation of the identified programs include the contribution of the program to the students in the region served by the institution and any potential revenue losses to the institution that would result from restructuring or eliminating the program. Input from the deans of programs under consideration is gathered and used in deliberations over the possibility of program consolidation or elimination. A faculty body is engaged to represent faculty interests to the university administration and to ensure that the institutional procedures and criteria for program redirection, reorganization, reduction, and termination are appropriately applied.

Students enrolled in these programs must be provided an opportunity to achieve their academic goals. The decision to close down a degree program scheduled to be eliminated always requires an appropriate period of time to ensure that students in the pipeline graduate from the program or are offered alternative routes to their academic goals. No new students are permitted to enroll in the program after its formal termination.

Institutional responsibilities to tenured and tenure-track faculty associated with these programs must also be met. Ideally, this results in reassignment of such faculty to other responsibilities within their units. The final disposition of the affected faculty will predictably require program specific actions, so it seems that institution or Systemwide policy in this area will most effectively take the form of a set of governing principles rather than a proscriptive process.

Throughout the analysis of program duplication and the institutional changes that most certainly follow this analysis, the Provosts are acting with a clear sense, not of insular

protection of their specific campus, but of the necessity of realistically acting within the fiscal realities that will determine the sustainability of their campus and of the Oregon University System.

The State Board anticipates that institutional missions and programs are likely to change as conditions internal and external to their institutions change. Mission and Program Review will be periodically conducted by the State Board to insure that the OUS portfolio continues to fill the need of Oregon's students.

Report of Changes

The State Board of Higher Education has instructed the Provosts' Council to carry out the Review of Institutional Mission, Program Review and Program Duplication Review processes required in Section 1.4 of Senate Bill 442. The Provosts' Council, by the processes described in the preceding three sections of this report, is deeply engaged in this work. The changes in place on this date are confined to changes in premises and process. Agreement on the former has established a common basis for the Provosts' deliberations and a collaborative style has emerged during this work. The importance of this common base and of the positive impact of the time taken for collaboration to emerge can be appreciated by any who have participated as a member of a group charged with difficult tasks analogous to the current work of the Provosts' Council.

Mission and Programs: Conclusion

We believe this exercise shows that the OUS institutions are accomplishing the mission and goals set out by OUS in its Long Range Plan. Undoubtedly, the mission intensity matrices that will result from the work described in the "Mission Review" section of this report will show the specific aspects of the OUS mission that are covered by multiple institutions. The Program Review and Program Duplication Reviews will not just identify program duplications, but will establish a realistic process for determining duplications that are necessary and appropriate and an effective process for program restructuring and elimination. We look forward to working with the Presidents and Board to improve efficiency where possible, though we do not believe there is much wasteful duplication.



Senate Bill 442: Section 2



SECTION 2.1 – 2.5 EXISTING STATUTORY LANGUAGE HAD NO CHANGES
SECTION 2.6 – OSBHE IMPLEMENTATION OF COMMON ADMISSIONS PROCESS

SECTION 2.1 – 2.5 EXISTING STATUTORY LANGUAGE

(No changes)

SECTION 2.6 – OSBHE IMPLEMENTATION OF COMMON ADMISSIONS PROCESS

Section 2(6) of Senate Bill 442 from the 2009 Oregon Legislative Assembly states:

For all institutions of higher education listed in ORS 352.002, the board shall, no later than October 1, 2010, and to the extent feasible and cost beneficial, develop and begin implementation of a common admissions process that permits applicants to be considered for admission to more than one institution.

Recent discussions about a common admissions process among the seven OUS institutions began with the above-mentioned shared services study and continued with an ad hoc group of OUS admissions directors and enrollment managers facilitated by Chancellor’s Office staff in the winter of 2008-09. Implementation of a common admissions process – not to be confused with a common application – was then mandated by the Oregon State Board of Higher Education in the spring of 2009 and further required in Senate Bill 442, which became law in June 2009.

This process involves identifying students who are denied admission at one or more institutions, in order to admit them to other OUS institutions where they are found admissible, for the purpose of expanding opportunities for Oregon high school graduates to gain access to a public university education in Oregon. Six of the seven universities are participating in planning and implementation. A seventh, University of Oregon (UO), had a pre-existing Memorandum of Understanding with Southern Oregon University (SOU) whereby their denied applicants are referred directly to SOU for admission consideration. SOU, on the other hand, is participating in both programs—the MOU with University of Oregon, and the Common Admissions Process. It became clear during the planning process that the larger universities would be the major “senders” of denied applicant data, while the regional universities would be the primary “receivers” of student data, although in theory each university can send and receive student data.

In Summer 2009, at the request of the OUS Chancellor’s Office, Information Services at OSU developed the technology infrastructure necessary to implement the process. WOU agreed to be a test site for the technology to ensure that it was working effectively before being made available to each university for implementation. At the same time, each participating university

was instructed to update its admission application form so that students wishing to be considered at other OUS institutions if denied admission at their university of choice could indicate their assent on the application form. Selected application data on students who indicate their assent, and who are about to be denied admission, are sent to a central electronic location so other universities can admit them or invite application if there is insufficient data to admit them directly.

While the technology infrastructure and the revision of university application forms were completed in a timely fashion, it took longer than expected for universities' respective Information Technology departments to implement the technology on campus. However, by March 2010, the Common Admissions Process was up and running, with the exception of Eastern Oregon University, where the position of director of admissions was vacant for much of this time. EOU is participating in the program now, effective June 2010. It is also clear from the data (below) that campus business practices will need to be further refined so that more students can be offered direct admissions without needing to apply a second time. Specifically, students' high school subject requirements would need to be sent to the central electronic location described above in order for student admissibility to be determined. The Chancellor's Office will work with campus admissions directors during the 2010-11 academic year to estimate staffing, IT, and other costs of taking this next step and to implement it to the extent feasible.

As of August 1, 2010, a total of 375 undergraduate applicants indicating interest in admission to other OUS institutions were denied admission at their first choice university, while three of them were offered admission at a second university, and 550 invitations to apply were sent out where insufficient data was available (Since many of these students received multiple invitations, the total is greater than the total number of students initially denied admission.) The following table summarizes the common admissions process activity to date. The activity is ongoing, however, and actual enrollment and revenue figures (i.e., the number of students enrolled and the estimated revenue associated with that enrollment) will not be available until after the fourth week of Fall term, 2010.

Common Admissions Data (4/1 - 7/31/10)

		OSU	PSU	OIT	SOU	WOU	EOU	Total
1	# of students denied	213	139	0	11	12	0	375
2	# of students granted automatic admission			0	3	0	0	3
3	# of students invited to apply (prospects)			155	185	175	35	550
3a	# who did apply			1	28	3	0	32
3b	# who were admitted			0	12	2 (1 pending)	0	13

Senate Bill 442: Section 3



SECTION 3– REPORTING OF ENROLLMENT, REVENUE, COSTS, AND SAVINGS ASSOCIATED WITH ORS 351.070 (6)

SECTION 3 – Reporting of enrollment, revenue, costs, and savings associated with ORS 351.070(6)

Section 3 of Senate Bill 442 from the 2009 Oregon Legislative Assembly states:

The State Board of Higher Education shall report the enrollment, revenue, costs and savings associated with the measures in ORS 351.070 (6) to the Seventy-sixth Legislative Assembly before October 1, 2010, and the Seventy-seventh Legislative Assembly before October 1, 2012.

The upfront costs of developing the OUS Common Admissions Process were borne primarily by the Chancellor’s Office, in the form of information technology and programming expenditures, to create the program for institutions to access and use electronically. Subsequent campus expenses have been primarily staff time, printing and postage, telephonic, and campus-level IT and programming expenditures. The following table provides a summary to date.

Costs, Savings, Enrollment, and Revenue Generated by OUS Common Admissions Process (Academic Year 2009-10, as of September 15, 2010)

	Costs	Savings	Enrollment	Revenue
Chancellor’s Office	\$15,995	None	None	None
OUS Institutions	\$10,970	None	TBD*	TBD*

* Enrollment and, thus, revenue, cannot be determined until Fall term 2010 final enrollment figures are available, typically at the beginning of November.



Appendix A: Semester Conversion

A1: [Chronology of Semester Conversion Consideration](#)

A2: Semester Transitions

- [Portland Community College Semester Cost Savings Report](#)
- [Portland State University Semester Conversion Report](#)
- [Rogue Community College Final Cost Analysis Report](#)
- [Southern Oregon University Semester Financial Impact Report](#)

A3: Semester Conversion Survey Results and Analysis

- [Conversion to Semester System Comments](#)
- [Semester Conversion Survey Results](#)

A4: [Perspective and Data from Other States](#)

Appendix B: Rural Access and Success

B1: [Rural Student Access to Higher Education in Oregon](#)

B2: [Community College Rural Access Survey and Summary](#)

B3: [OUS Rural Student Recruitment and Success Approaches](#)

B4: ASC Rural Access and Success Priority Areas – [Goal 1](#) and [Goal 2](#) (*two documents*)

Appendix C: OUS Mission and Goals

C1: [OUS Mission and Goals](#)



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