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To: Tim Nesbitt, Office of the Governor

From: George Pernsteiner

Subject: Achievement Compacts

As we discussed, OUS is requesting that the Oregon Education Investment Board approve modifications to our OUS and Institutional Achievement Compacts. Attached are the proposed revised compacts. These proposed changes are based on the feedback you have provided and in consultation with our universities.

Below is a summary of the changes made to the OEIB Institutional and OUS Achievement Compacts from the last time this document was submitted (3/27/2012) to this current version.

1. Each Institutional Compact mirrors the OUS compact in format and number of metrics, with one exception. OSU will retain "the # of Oregon residents and youth participants in activities sponsored by the OSU Extension Service per million dollars invested."

2. At your suggestion, the following metrics were deleted from all compacts:

a. Degrees awarded in targeted workforce areas (STEM Professions, Health Professions, and STEM Education)

b. Sponsored research expenditures

c. Number of students who complete internships/service learning or are engaged in some form of community-based learning

3. Each Institutional compact contains breakouts for actuals and projections for disadvantaged students as defined by OEIB Rule 705-0010-0040, item 4. Both economically disadvantaged (determined by Pell Grant eligibility) and other disadvantaged students (determined by Race/Ethnicity) will be reported in separate categories, both in aggregate and in detail at both the system and campus levels for all three years. Ethnic minority and Pell eligibility breakouts are also addressed in the definitions section of the document. Disadvantaged status using this definition is not applicable to metrics relating to advanced degree recipients, employers, or the extension service.

4. Footnotes are included on all tables explaining that a student may be included as both a racial/ethnic minority and as Pell eligible.

5. State investment is shown in both OUS and Institutional Compacts. State investment in OUS on page 2 of the document shows general fund (E&G, Extension Service and Debt Service) and Lottery Funds (Sports Action and Debt Service). E&G amounts are shown for each institution under the Investment category. While a total E&G amount is reported for OUS for FY 2012-13, campus breakouts for FY 2012-13 won't be available until after the June OSBHE meeting.

6. The "Assumptions" paragraph on page 1 for the system was not edited; however, the 'Assumptions' section was deleted on each of the campus compacts, along with the subsequent sentence on sufficient resources.

7. The middle column heading on the leading table showing all 3 years was changed to "2011-12 projections". The category of multi-racial/multi-ethnic was included on subsequent pages.

8. The following metric for the 'percentage of graduates unemployed in Oregon compared with the % of workforce unemployed in Oregon' was flagged for future submission. Data for these graduates with regard to disadvantaged status is not available.

9. All data definitions are included in the data dictionary, found at the end of the document. Campus and system data will be reported according to these definitions. Definitions for the independent variables ('All' and 'Disadvantaged') are also included in the data dictionary.

I continue to believe that the degrees in targeted workforce areas, some of which are in subjects designated by prior legislative action, are important for the success of Oregon and that we should have further discussion in the future about how to approach this issue. We will continue to track these degrees due to their importance to Oregon.

I understand that the removal of the sponsored research measure reflects a desire to focus the attention of the OEIB on student success and not on the other important aspects of university work. As you know, research is inextricably entwined with education in the work of our faculty. The measure on graduate degrees suggests that linkage and I am encouraged that our research efforts can and will be considered by other teams within the state's new ten-year budget process. Finally, I would be remiss if I did not mention that many of our graduates start off as nonresident students. At some point, we need to find a way to reflect that in our discussions about achieving our 40-40-20 goals.

Please do not hesitate to let me know if you have questions. OUS will be represented at next week's meeting to provide a summary of the changes and to respond to any questions. Thank you for your consideration.

Enclosure