



## OREGON EDUCATION INVESTMENT BOARD

September 9, 2014

1:00pm – 5:00pm

Oregon University System

Board Room, Suite 515

1800 SW 6<sup>th</sup> Avenue, Portland, Oregon 97201

Streamed live [HERE](#)

JOHN KITZHABER  
Governor of Oregon  
OEIB Chair

JULIA BRIM-  
EDWARDS

YVONNE CURTIS

MATTHEW  
DONEGAN

SAMUEL HENRY

NICHOLE JUNE  
MAHER

MARK MULVIHILL

DAVID RIVES

RON SAXTON

MARY SPILDE  
Chair-Designee

KAY TORAN

JOHANNA  
VAANDERING

DICK WITHNELL

Chief Education Officer  
NANCY GOLDEN

*Members of the public wanting to give public testimony must sign in.  
There will only be one speaker from each group.  
Each individual speaker or group spokesperson will have 3 minutes.*

### AGENDA

- 1. Board Welcome and Roll Call**
- 2. Chief Education Officer Update**  
Dr. Nancy Golden, Chief Education Officer
- 3. Early Reading Initiative**  
Kristin Gimbel, Communications Director, OEIB
- 4. Subcommittee Reports / Recommendations**  
Best Practices and Student Transition - **FIRST READING**  
Dr. Yvonne Curtis, Chair  
Dr. Hilda Rosselli, Staff, OEIB  
Equity & Partnerships Subcommittee – **SECOND READING/ACTION ITEM**  
Nichole Maher, Chair  
Shandiin Garcia, Staff, OEIB  
Outcomes and Investments Subcommittee - **FIRST READING**  
Dick Withnell, Chair  
Peter Tromba, Staff, OEIB  
Personnel Management Subcommittee  
Julia Brim-Edwards, Chair
- 5. Achievement Compact Recommendations – ACTION ITEM**  
Peter Tromba, Staff, OEIB
- 6. Consent Agenda Items – ACTION ITEMS**  
June Meeting Minutes  
2015-17 OEIB Agency Budget  
Engineering & Technology Investment Council

**7. Agency Update**

Early Learning Division

Introduction: Megan Irwin, Acting Early Learning System Director

**8. Public testimony**

**9. Adjournment**



Oregon Education Investment Board

# Oregon's Statewide Literacy Campaign

# The Charge

- Complement the \$7.6 million in literacy-related investments
- Align with state birth-3<sup>rd</sup> grade initiatives
- Build Awareness
- Galvanize Oregonians to support students and families with reaching 3rd grade benchmark

# The Approach

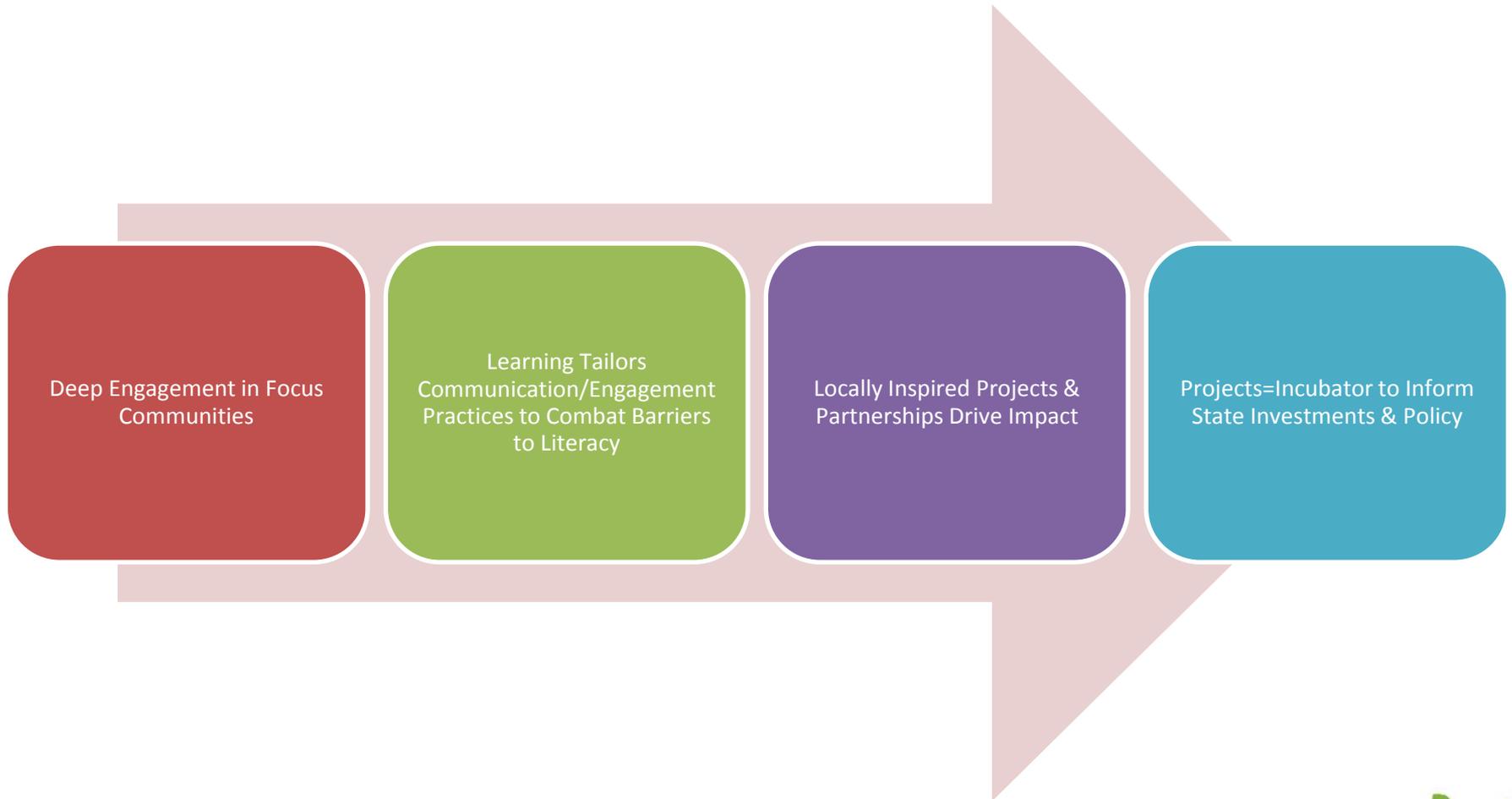
**Focus on Families:** Unlock the potential of families to play a key role in supporting literacy skill building

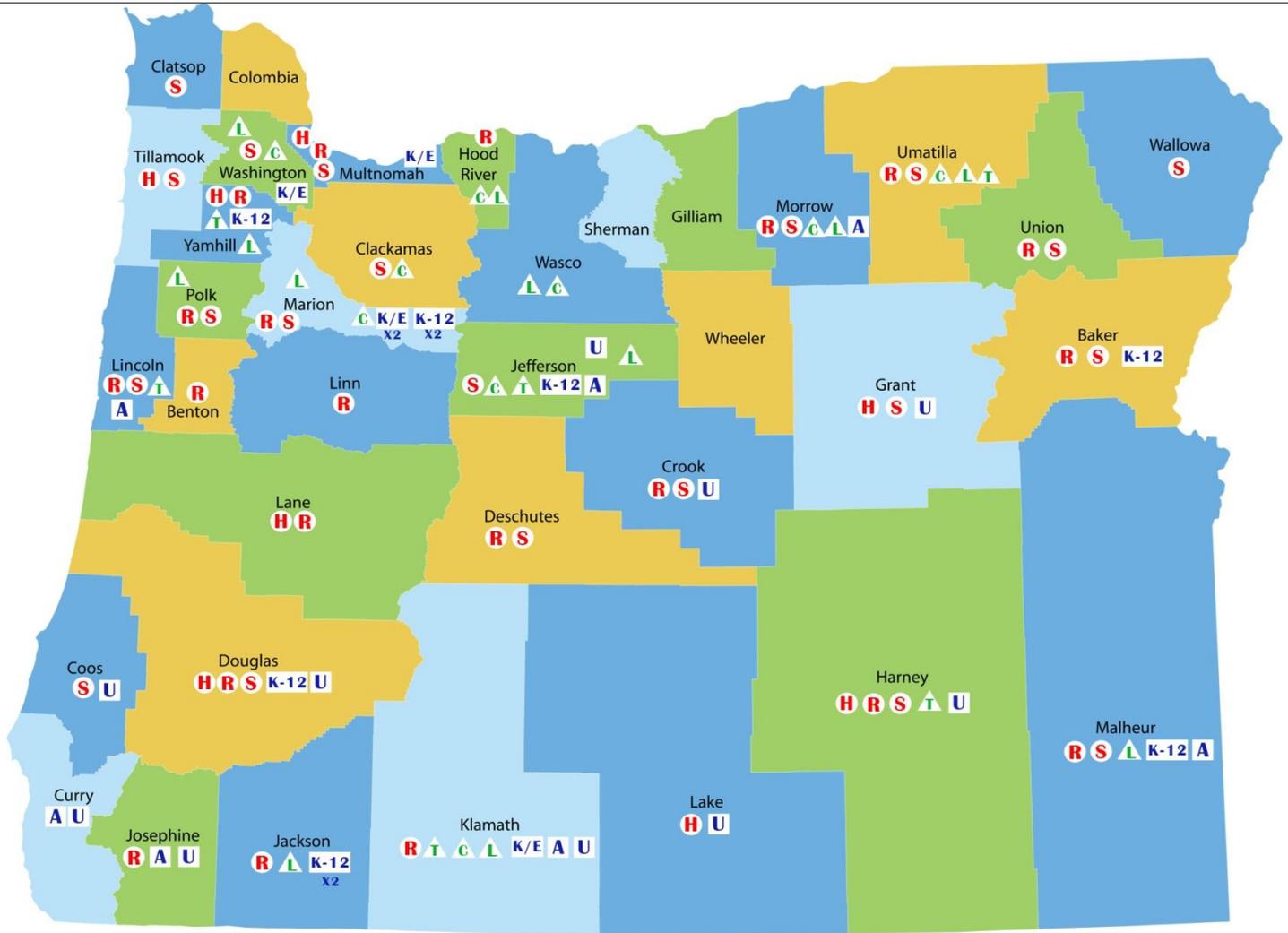
- Target families whose children are not on track to read proficiently by third grade.
- Work with families and organizations supporting them to meet families where they are
- Empower parents and bring important skill building into the home and community in ways that are easy and both regionally and culturally relevant

# Engaging to Listen & Understand

- Understand barriers and opportunities to reading proficiently by third grade by engaging deeply with “focus” communities
  - Parents
  - Education leaders
  - Libraries
  - Non profits and culturally specific organizations
  - Tribal communities
  - Other literacy stakeholders

# Theory of Impact

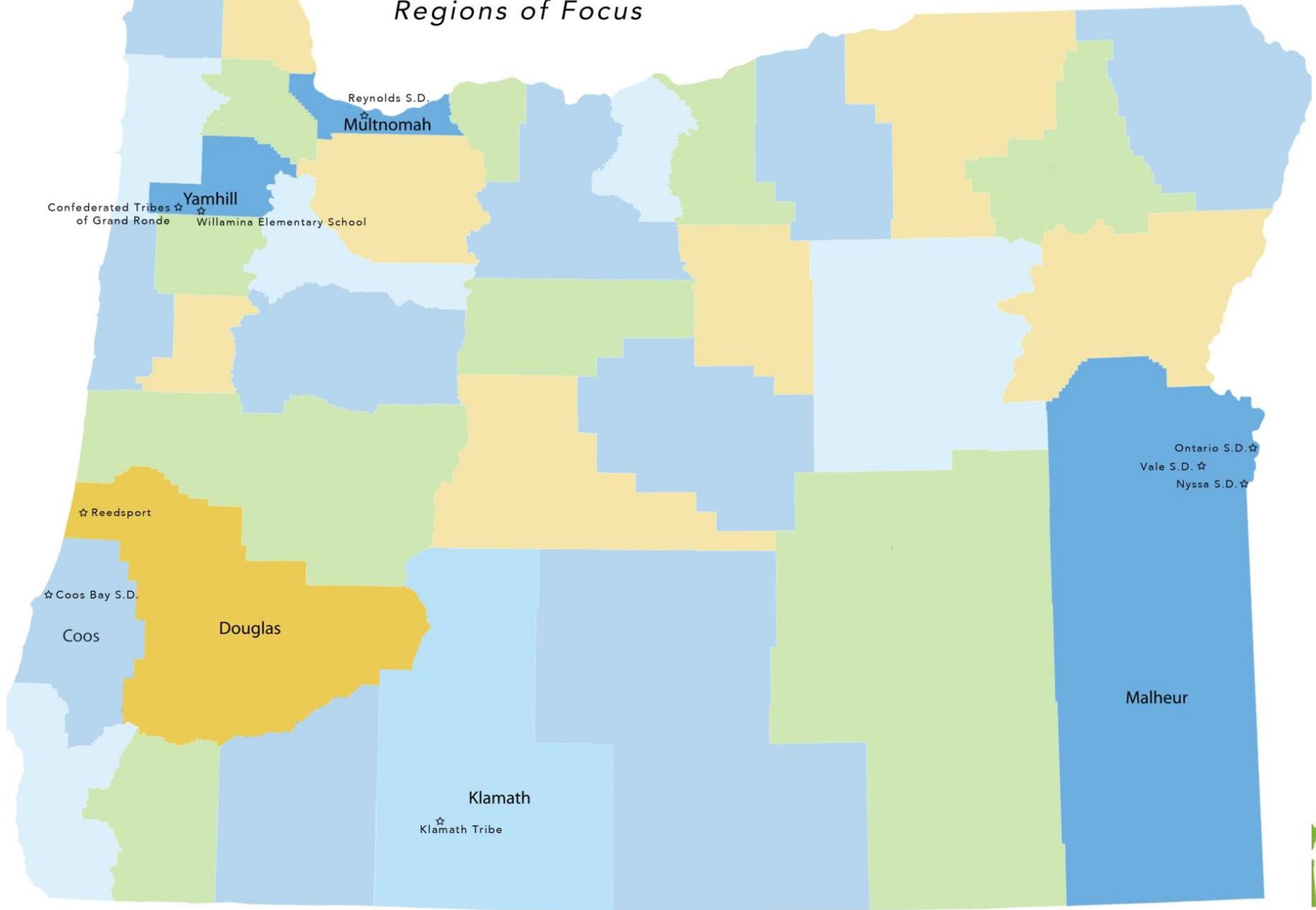




# Oregon Early Literacy Campaign

## *Regions of Focus*

revision: 06.03.14



# Focus Communities

- The Confederated Tribes of the Grand Ronde and Willamina Elementary School, **Yamhill County**
- Reynolds School District, **Multnomah County**
- Reedsport, North Bend & Coos Bay School Districts, **Coos & Douglas Counties**
- Ontario and Vale School Districts, **Malheur County**
- The Klamath Tribe, **Klamath County**

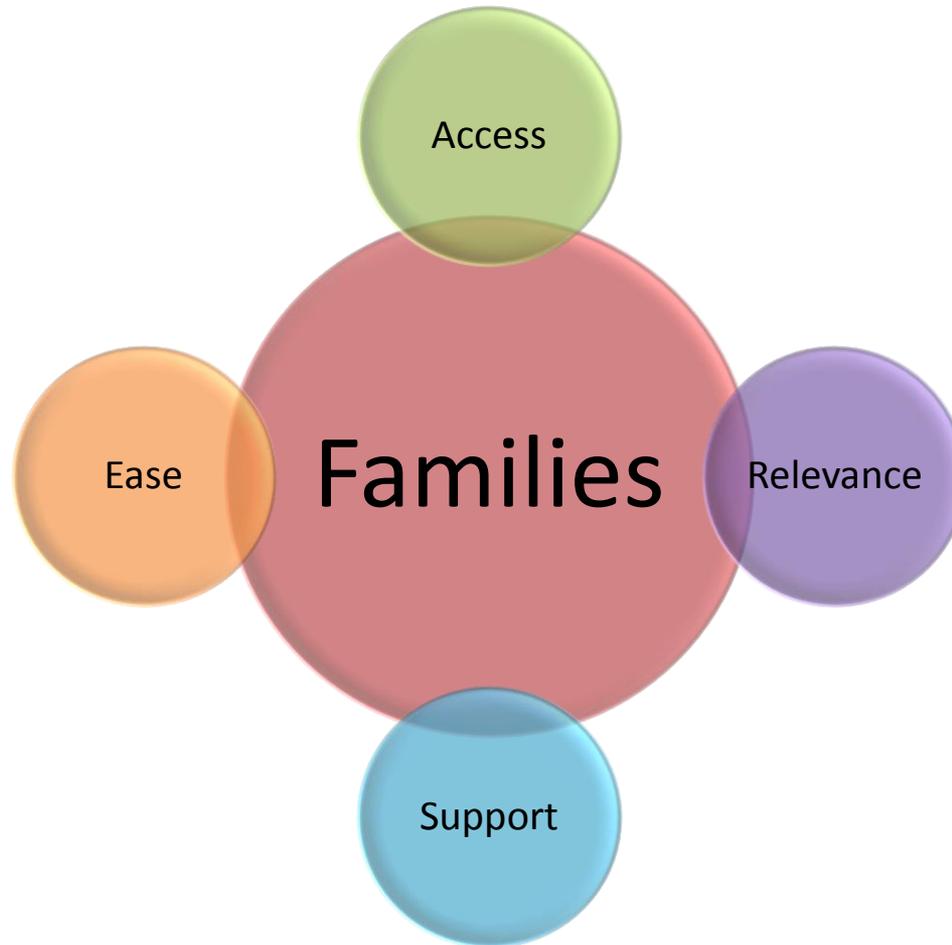
# Focus Community Themes

- Parents feel that they do not know how to engage their children at home
- The notion of reading to and with their children is intimidating to parents. Even the word “reading” does not feel inviting to low literacy parents.
- Barriers to accessing what literacy programs exist
- Parents need encouragement and support to be their child’s first teacher.
  - Host of misperceptions driven by culture or family upbringing
- Many families do not have books at home and certainly not culturally specific or relevant books that resonate with parents and students.
- For many families in poverty or those struggling with other challenges at home, reading takes a backseat to meeting basic family needs.

# Key Statewide Partners

- Megan Irwin, Acting Early Learning Director
- Brett Walker—Early Learning Division, P3 Alignment Specialist
- Karen Twain—Oregon Department of Education, Director of Literacy
- April Campbell—Office of Learning, Education Equity, Oregon Department of Education
- Mary Louise McClintock—Oregon Community Foundation, Director of Education Programs
- Mary Kay Dahlgreen—Oregon Library Association, State Librarian

# Campaign Values



# The Look and Language...



# The Look and Language...



TALK  
PLAY  
SING  
READ

# The Look and Language...

**STORY**  
**time**

every day. everywhere.



# StORytIME Strategies

Own Locally

Build  
Awareness

Create Access  
and  
Engagement

Evaluate,  
Refine &  
Replicate

# Snapshot: Campaign Components

## Communication:

- Logos, name and tagline
- Key messaging targeted for multiple audiences
- Collateral that can be locally customized
- Poster

## Engagement:

- Family Videos
- Website
- Parent Activity Card
- Placemats
- Take the “Pledge”

# Campaign Experience

- Statewide Presence: Phase 1
  - Campaign website targeted towards partners
    - Book donation portal: Oregonians can send books to schools in their community that students select and take home
    - Collateral materials and family engagement activities for download in multiple languages
    - Stories
    - Videos
    - Take the Literacy Pledge
  - Prominent presence in Umpqua Bank locations across Oregon

# Campaign Experience

- Focus Communities: Phase 1
  - Community driven projects or activities
  - Customized StORytime logos that is inspired by the community
  - Launch events in each community
  - Family centric videos that feature members of each community
  - Collaboration with each community to involve/engage key partners
  - Alignment with state investments in literacy and regional efforts in each community: HUBS/RAC's

# Family Engagement Tactics

Go to them

Reach them  
where they  
are already  
going

Provide  
immediate  
Access

# Leveraging Resources

- Race to the Top
- Early Literacy
- September push—Governor's initiative
- Poverty to Prosperity Initiative-Oregon Solutions Project
- Existing community resources for literacy activities aligned with the campaign
- Potential philanthropic investments

# Next Steps

- Launch campaign and associated tools via collaboratively created launch events in each focus community: October 2-November 12
- Concurrently, work with partners to develop state-wide visibility and sharing of engagement strategies, tools and learnings
- Evaluate, refine and consider replication opportunities in other communities

# Questions??

## **Best Practices and Student Transitions Recommendations to the OEIB Board**

### **K-12 Student Transitions**

#### **POTENTIAL TASKS OR POLICY CHANGES**

##### **A. To Oregon Department of Education Equity Unit and OEIB Research and Policy Unit**

- 1) Analyze practices and current strategic investments in districts (conditions, instruction, and programs) resulting in English Learner (EL) students making sufficient progress in language proficiency and exiting the EL program before high school and provide technical assistance to districts that have the lowest graduation rates and high populations of EL learners. (Task)

##### **B. To Oregon Department of Education**

- 1) Help insure that all students in Oregon have access to Full Day Kindergarten in 2015 and that schools leverage school calendar for needed Professional Development for Kindergarten teachers and address funding needs for personnel and resources. (Policy)

#### **CURRENT WORK UNDERWAY THAT THE SUBCOMMITTEE SUPPORTS AS BEST PRACTICE**

- 1) Develop a High School diploma bi-literacy seal that views students' second language as an asset.
- 2) Provide a Spanish summative reading assessment for grades 3, 4, 5 aligned with state assessment.

### **Student Transitions 11-14**

#### **POTENTIAL TASKS OR POLICY CHANGES**

##### **A. To Oregon Education Investment Board Staff and Higher Education Coordinating Commission**

- 1) Consider how participation and completion rates in remedial education as well as persistence rates for students enrolled in postsecondary education can be incorporated into future metrics. (Policy)

##### **B. To Oregon Department of Education**

- 1) Using results from Eastern Promise models and Accelerated Learning Committee's work, develop a statewide plan for fully maximizing the senior year that includes access to writing and math classes that support college readiness and a course that emphasizes college going skills known to be critical for success, particularly for first generation college students. (Task)

##### **C. To Higher Education Coordinating Commission**

- 1) Identify solutions to barriers faced by students accessing Oregon Opportunity Grants who lack citizenship or who have earned a modified diploma. (Task)

- 2) Address barriers for districts falling short of eligibility for TRIO<sup>1</sup> program funding (e.g. Gear Up) but who need to provide students support to ensure transition to postsecondary education. (Task)
- 3) Examine solutions to “Summer Melt<sup>2</sup>” (handoff between high school and postsecondary institution) and share best practices with the Best Practices Student Transitions Subcommittee. (Task)

#### **D. To Higher Education Coordinating Commission and State Board of Education--**

1. Explore future use of Smarter Balanced Assessment Consortium (SBAC) results in lieu of placement tests for students articulating directly to postsecondary education and promote high school and postsecondary alignment work on course standards and tests. (Task)

## **Educator Quality**

### **POTENTIAL TASKS OR POLICY CHANGES**

#### **A. To Teacher Standards and Practices Commission and Oregon Association of College for Teacher Education (OACTE)**

- 1) Identify best practices for selecting, preparing and compensating Cooperating Teachers and embed these in program approval standards. (Policy)
- 2) Identify funding sources for educator preparation programs to implement Goal 7 of the EL State Strategic plan to include EL basic knowledge strategies into curriculum of all future educators. (Task)
- 3) Identify ways to align evaluation tools across educator preparation programs and with state framework for educator effectiveness. (Task)
- 4) Identify program content and experiences that could enhance future secondary level teachers’ ability to support both College as well as Career and Technical Education success for students. (Task)

## **Digital Conversion**

### **POTENTIAL TASKS OR POLICY CHANGES**

#### **A. To Legislators**

- 1) Identify ways to help fund digital devices for students’ use based on a distribution mechanism established by ODE that considers readiness and need. (Task)

#### **B. To Oregon Department of Education**

- 1) Provide dedicated staff to develop and implement a strategic plan that address barriers identified in the Power UP Report developed by Confederation of School Administrators. (Task)

<sup>1</sup> TRIO includes eight federally funded programs targeted to serve and assist low-income individuals, first-generation college students, and individuals with disabilities to progress through the academic pipeline from middle school to post-baccalaureate programs.

<sup>2</sup> Summer Melt describes a situation where students pay a deposit to attend a particular college but do not matriculate at that college the following fall.

**Oregon Education Investment Board (OEIB)  
Equity & Partnerships Subcommittee – Sept 3, 2014**

**Policy Recommendation Framework for Youth without High School**

**Diplomas:**

**Creating a Shoreline of Opportunities**

**Background**

High school completion is a key metric in Oregon to measure systemic success; however, 25% of Oregon students do not complete high school. Students of color and students from poverty are over-represented in the population of students without a high school diploma. It is incumbent on K-12 educational institutions to eliminate that opportunity gap.

As K-12 improves graduation rates and closes opportunity gaps, there remains and will remain for years a segregated group of youth without diplomas. Oregon currently has only one alternative route to a diploma for students to demonstrate high school content attainment. Improving and increasing alternative routes to high school certification is a critical equity issue. An opportunity exists for Oregon to increase the number and diversity of students earning an alternative high school certification, enrolling and completing post-secondary education, and finding gainful employment.

The goal of any existing or new route to high school certification must have the same goals as those of existing high schools and districts: career and college readiness -- critical thinkers prepared for life post high school. A spectrum of programs and approaches with common standards will provide a differentiated set of paths that can serve all students. The data is clear: current systems do not serve all Oregon students. We require a more diverse system that meets the needs of each and every student.

In Oregon, the General Education Development (GED) subject tests are currently the only method other than a high school diploma to certify that a student has met high school level academic skills. Therefore, access and options for students to high school equivalency (HSE) training and testing is crucial. In addition, in January 2014, the GED Testing Service changed to a new assessment that continues to provide a mechanism to earn a high school credential and adds measures of career and college readiness. Test takers can now attain a GED (high school equivalence) or a GED With Honors (career and college ready).

This “new GED” presents an opportunity for the state to re-brand the test and the preparation programs associated with it. The goal of an HSE With Honors is aligned to the goals of high schools and K-12 districts and therefore a more powerful credential for post-secondary admissions and employers.

**Vision**

Oregon’s 40-40-20 goal, adopted into law in 2011, has become shorthand for the efforts of the Legislature, Governor, the OEIB, and other state education boards, commissions, and agencies to significantly improve the education achievement levels and prosperity of Oregonians by 2025. The 40-40-

20 goal intends to provide a clear target aligned with Oregonians' economic, civic, and social aspirations, against which to generally gauge the state's educational progress. The OEIB and the Governor are united in the belief that in order for the 40-40-20 goal to be meaningful, it must be accompanied by the clear understanding that increased levels of attainment of diplomas, degrees and certificates must be achieved equitably across populations and across regions of the state.

Fundamentally, 40-40-20 says that *every Oregonian* is capable of earning at least a high school diploma or the equivalent thereof, and must have the opportunity to enter into the workforce in a meaningful way. Oregon's youth who are not represented in the "traditional" pipeline must be considered as part of the "each and every" to whom our goal applies. In fact, the success of these youth is fundamental to the overall achievement of the 40-40-20 goal.

In the years leading up to 2025, we cannot afford to ignore our youth who are at risk of or who have stopped attending school, but rather must seize the opportunity these youth represent for improving our outcomes in both the short and long term. In Oregon and across the country, these out of school youth are described as Opportunity Youth to represent their potential and to identify students from a strength-based perspective. These youth are a clear opportunity for Oregon: as they reach high school and post-secondary goals, they bring value and powerful contributions to our communities.

Opportunity Youth include:

- Students who never attended high school.
- Students who did not complete high school.
- Youth with a high school diploma or equivalent, who are disconnected from postsecondary education and/or who are unable to gain a foothold in the labor market.

Instead of the traditional pipeline, a shoreline approach will better serve their needs. Opportunity Youth need multiple access points and multiple pathways with no wrong door. Therefore it is critical that we consider systemic responses to create this access and these pathways for students to complete high school and attain career and college readiness. One response is to improve the intrinsic and extrinsic value of current programs and another is to consider alternatives.

## **Beliefs**

We believe the P-12 system is working to increase the number of students who complete high school; however the 25% of youth without a diploma must be served with improved systems.

We believe that a significant number of Opportunity Youth require more and better options to demonstrate high school content attainment and achieve college and career readiness.

We believe that any "pipeline" approach to serving students will inherently not serve each and every student; a shoreline approach is required. Funding culturally specific community groups directly helps build this shoreline for students.

We believe that because the GED is currently the only alternative route to high school completion that the state must maximize the GED's potential for students through better public options and increased community based options.

We believe it is the responsibility of governing bodies to solve barriers, not the students' to navigate confusing systems.

We believe the new HSE test in Oregon, the GED has increased value, especially with the inclusion of college and career readiness indicators and the GED with Honors designation. We need a systemic communication campaign regarding the value of the new HSE test that crosses all education systems and institutions and that includes students and employers.

We believe that high education needs to be a partner by recruiting, welcoming, admitting, and responsively supporting students who complete a HSE. This may require significant cultural shifts at some institutions.

We believe that programs for HSE preparation that also provide wrap-around services and that attend to college and career readiness are a best practice.

We believe that welcoming and culturally responsive HSE training and testing programs increase the chance for high and equitable levels of HSE attainment.

We believe that cost should not be a barrier for students in their decision and ability to get training for a HSE or to take the test.

We believe the state must research HSE alternatives currently accepted in other states and evaluate them as possible options for Oregon.

## **Strategic Recommendations**

The areas addressed in these recommendations fall, in many cases, within the charges of other agencies, boards, and workgroups. The intent of the OEIB Equity & Partnerships Subcommittee is to provide high-level direction and alignment between those efforts and to suggest areas of investment or repurposing of resources to better serve state goals.

The 2013 Secretary of State Audit Report: "Opportunities to Increase Adult GEDs In Support of 40-40-20 Education Plan" and the 2014 Portland City Club Report: "A Second Chance for Oregon, High School Dropouts and the GED" have both produced important recommendations. The OEIB has considered these recommendations, along with input and testimony to the Equity and Partnerships Sub-Committee and their subsequent deliberations and discussion, to produce the following:

Alignment:

- The creation of a work group with Community College and Workforce Development (CCWD), community college, the Oregon Department of Education (ODE) and high school staff and others involved with state based HS training and testing programs to produce an analysis of current practices and policies and recommendations for how those systems can be aligned and serve more students more effectively.

- Continued collaboration between high schools, community colleges, and other agencies to help ensure clients who need an HSE are referred to local programs.
- The development of common communication tools and protocols to ensure that the same message regarding the HSE exam is distributed across settings.
- Data sharing among agencies.

Access:

- Implement strategies to defray the cost of HSE preparation programs and the HSE test.
- Broaden the set of qualified HSE preparation providers to include community or faith based organizations that already serve Opportunity Youth with wrap-around services.
- Improve the culturally responsive practices of state providers.
- Develop blended HSE preparations that are partially delivered on line.

Value:

- Increase public awareness of the value of obtaining an HSE credential. Any campaign should address multiple audiences: Opportunity Youth, employers, and internal staff.
- Request Oregon’s public universities update their admissions criteria to allow admissions for qualified recipients of the HSE who earn the GED Honors designation.

Research:

- Evaluate the relative effectiveness of HSE providers.
- Investigate the other alternatives to a diploma currently in use in other states.

## **Investment and Resource Reallocation Recommendations for the 2015-2017 Biennium**

Recommendation 1: Analyze current HSE programs governed by the ODE, CCWD, and Department of Corrections in order to create aligned programs that serve more students more equitably.

Recommendation 2: Identify successful organizations who provide wrap-around services and strategically invest and partner with them to either begin providing or continue to provide HSE Preparation for Opportunity Youth.

Recommendation 3: Lower cost barriers for students by standardizing and supporting current efforts across community colleges.

The Outcomes and Investments sub-committee of the OEIB is calling for descriptions of proposed strategic investments for the 2015-2017 biennia. Therefore, recommendations 1, 2, and 3 have been expanded and analyzed using the framework supplied by this sub-committee and for proposal in July 2014.

# Pathway to Kindergarten Readiness and 3rd Grade Reading

- Too many students, especially students of color, are not reading proficiently by 3rd grade.
- Students ready for kindergarten are much more likely to reach 3rd grade reading proficiency.
- Students who achieve reading proficiency in 3rd grade are 4 times less likely to drop out. School districts that do not need to spend as much on reading remediation can offer a more diverse program, which includes the electives that help keep many students engaged in school.
- Improvements in professional practice and more engaging learning environments will increase achievement and help eliminate opportunity gaps.
- Interventions in low performing K-12 districts, especially ones that focus on improving instructional leadership, will increase the number of students reading proficiently.

## Outcome Measures

	Percentage of students ready for Kindergarten	Percentage of students reading proficiently by 3rd grade
Current		
2-year		
4-year		

## Key Strategies

### Scope

P-20 Essential Skills  
Collective Impact  
Educator Effectiveness  
Quality Learning Env  
System Redesign

Birth to 3	66,000 children					✓
Quality Early Childcare	85,000 children			✓	✓	
Early Years to Kindergarten	250,000 children	✓	✓			
3rd Grade Reading	180,000 students	✓	✓	✓		
Dual Language Progress Monitoring	7500 students	✓				
Full Access to K-12 Mentoring	2900 educators			✓		
Culturally Responsive Teaching Practices	30,000 educators			✓	✓	
Support for Low Performing Schools/Districts	8,100 students	✓				✓
Expansion of School District Collaboration	200,000 students	✓		✓		

**P-20 Essential Skills:** Relevant curriculum and instruction that ensures every student achieves high standards.

**Collective Impact:** Communities coming together to mutually achieve student success.

**Educator Effectiveness:** Improving educators ability to serve all students especially those most affected by opportunity gaps.

**Quality Learning Environments:** Creating culturally responsive conditions that achieve high attendance and student engagement.

**System Redesign:** Changing existing structures and programs within and between agencies to remove barriers and opportunity gaps.

# Pathway to High School and Post-Secondary Completion

- Systemic barriers prevent many students, especially students of color, from completing high school, earning a professional/technical certificate, or completing a post-secondary degree.
- Improvements in the programs for English Language Learners and first-year high school students will significantly raise high school completion rates.
- Improvements in professional practice and more engaging learning environments will increase achievement and help eliminate opportunity gaps.
- Alignment of high school and post-secondary curriculum and practice will reduce systemic barriers for students.
- Reducing cost and creating new pathways will increase the number and diversity of students completing certificates and degrees.

Outcome Measures		5-year completion rate	Degree and certificate completion rate
	Current		
	2-year		
	4-year		

Key Strategies	Scope					
		P-20 Essential Skills	Collective Impact	Educator Effectiveness	Quality Learning Env	System Redesign
ELL Funding Formula Change	58,000 students	✓				✓
9th Grade On-Track	27,450 students				✓	
Higher Education Affordability	92,000 students				✓	✓
Higher Education Productivity	240,000 students			✓	✓	
Full Access to K-12 Mentoring	2900 educators			✓		
Culturally Responsive Teaching Practices	30,000 educators			✓	✓	
Support for Low Performing Schools/Districts	8,100 students	✓				✓
Expansion of School District Collaboration	200,000 students	✓		✓		
STEM Hubs	150,000 students	✓	✓		✓	
Dual Credit		✓			✓	✓
Blended Advising					✓	
Math Alignment and Instructional Redesign		✓			✓	
Personal Achievement Record	All students				✓	✓

**P-20 Essential Skills:** Relevant curriculum and instruction that ensures every student achieves high standards.

**Collective Impact:** Communities coming together to mutually achieve student success.

**Educator Effectiveness:** Improving educators ability to serve all students especially those most affected by opportunity gaps.

**Quality Learning Environments:** Creating culturally responsive conditions that achieve high attendance and student engagement.

**System Redesign:** Changing existing structures and programs within and between agencies to remove barriers and opportunity gaps.

# Pathways Connecting Education to Careers

- Too many jobs are going unfilled in Oregon because of skills shortages. The shortages are particularly acute in degrees relating to science, engineering, math and technical education (STEM) and the population with the most opportunity for growth are students of color.
- New funding formulas that account for the higher cost of these programs will produce more degrees and certifications in STEM and for a more diverse population.
- When students see the connection between their future interests and what they are learning or might choose to learn, they are more successful learners.
- Schools and employers must work more closely together to match curriculum with actual needs.
- When opportunity gaps are eliminated, students of color will become career ready.

## Outcome Measures

	Number of graduates employed in their field of study	Number of graduates employed in STEM fields
Current		
2-year		
4-year		

## Key Strategies

### Scope

P-20 Essential Skills  
Collective Impact  
Educator Effectiveness  
Quality Learning Env  
System Redesign

Youth and Community Investment	10,000 students					✓
Culturally Responsive Teaching Practices	30,000 educators			✓	✓	✓
High School Equivalency	50,000 students	✓			✓	✓
STEM Hubs	150,000 students	✓	✓			
Post-secondary Talent Development	200 educators			✓		✓
CTE Revitalization		✓			✓	✓
Personal Achievement Record	All students				✓	✓

**P-20 Essential Skills:** Relevant curriculum and instruction that ensures every student achieves high standards.

**Collective Impact:** Communities coming together to mutually achieve student success.

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**System Redesign:** Changing existing structures and programs within and between agencies to remove barriers and opportunity gaps.

Oregon Education Investment Board  
Achievement Compact Final Policy Recommendations  
September 2014

1. Significantly reduce school district, community college, and public university reporting requirements and make the achievement compact process more integrated, meaningful, and actionable
  - a. Goal setting in 1 or 2 focus areas only
    - i. Does not require change in statute or administrative rules
  - b. 3 year goals with theories of action
    - i. Does not require change in statute or administrative rules
  - c. Timeline that fits with post-secondary institutional processes
    - i. Requires change in ORS 326
  - d. Analyze how achievement compact work can replace other required reporting
    - i. May require changes in statutes and/or rules
2. Provide OEIB focus and investment to produce aligned efforts and increased results
  - a. K-12: 3rd grade reading and high school completion
  - b. Post-secondary: new productivity metric
  - c. Systemic: equity, chronic absenteeism, poverty
3. Maintain achievement compact metrics for measurement of statewide progress and accountability
  - a. Oregon Department of Education (ODE): Report cards and new district report card
  - b. Higher Education Coordinating Commission (HECC): New institutional report card
4. Improve parent engagement
  - a. OEIB will engage with parent, community, and culturally specific groups to review progress towards the achievement compact metrics and solicit suggestions for statewide strategies and focus areas.
  - b. OEIB will research existing K-12 district governance structures that exist in parallel with the achievement compact committees to assess redundancy and existing local methods of parent involvement in order to recommend a cohesive system of parent engagement.

**OREGON EDUCATION INVESTMENT BOARD**

June 10, 2014

1pm – 5pm

Oregon State Capitol

900 Court Street, NE, Salem 97301

[LINK TO AUDIO](#)

[LINK TO MATERIALS](#)

**OEIB Members Present**

Governor John Kitzhaber; Chair, Julia Brim-Edwards, Samuel Henry, Nichole June Maher, Mark Mulvihill, Ron Saxton, Mary Spilde, Dick Withnell

**Advisors Present**

Gerald Hamilton; Bob Brew; Jada Rupley; Ben Cannon; Rob Saxton;

**Members/Advisors Excused:**

Yvonne Curtis, Mathew Donegan; David Rives, Kay Toran, Hanna Vaandering, Melody Rose, Vicki Chamberlain, Iris Bell

**Staff/Other Participants**

Nancy Golden - OEIB Chief Education Officer

Ben Cannon -HECC

Whitney Grubbs – OEIB Staff

Hilda Rosselli – OEIB Staff

Serena Stoudamire Wesley – OEIB Staff

Mark Lewis – OEIB Staff

Peter Tromba – OEIB Staff

Seth Allen – OEIB Staff

Chrissi Hewitt – OEIB Staff

**1. Board Welcome and Roll Call**

Governor Kitzhaber calls the meeting to order at 1:05pm

**2. Approval of Minutes from April 2014 board meeting**

*Action Item*

**MOTION: Samuel Henry moves to accept the meeting minutes from the May meeting. Dick Withnell seconds the motion. The motion passes unanimously.**

**3. Chief Education Officer Update**

Dr. Nancy Golden, Chief Education Officer

**4. STEM Council Vision & Initial Recommendations**

Mark Lewis, STEM Director, Oregon Education Investment Board  
Dwayne Johnson, STEM Investment Council  
Aubrey Clark, STEM Investment Council

**5. Higher Education Coordinating Commission**

**Recommendations re: Oregon Opportunity Grant**

Larry Roper, Chair, State Financial Aid Workgroup  
Ben Cannon, Director, Higher Education Coordinating Commission

**6. Engineering & Technology Industry Council (ETIC) Transition Report**

Eric Meslow, ETIC Board

**7. Chief Education Officer Evaluation Process**

*Second Reading and Action*

Julia Brim-Edwards, Chair, Personnel & Management Subcommittee

**MOTION: Samuel Henry moves to adopt the Chief Education Officer Evaluation Process. Ron Saxton seconds the motion. The motion passes unanimously.**

**8. Preparing for the August OEIB Retreat**

Nancy Golden, Chief Education Officer

**9. Subcommittee Update**

Best Practices and Student Transitions – Dr. Yvonne Curtis, Chair  
Equity and Partnerships – Nichole June Maher, Chair  
Outcomes and Investments - Dick Withnell, Chair

**10. Agency Reports**

Higher Education Coordinating Commission – Ben Cannon, Director

**11. Public testimony**

Donna Cohen, Citizen

**12. Adjournment**

Chair Designee Mary Spilde adjourns the meeting at 4:00pm.

Oregon Education Investment Board  
2015-2017 Adopted Budget

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**Introduction**

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# CERTIFICATION

I hereby certify that the accompanying summary and detailed statements are true and correct to the best of my knowledge and belief and that the accuracy of all numerical information has been verified.

OREGON EDUCATION INVESTMENT BOARD

775 Court Street NE, Salem, OR 97301

AGENCY NAME

AGENCY ADDRESS



SIGNATURE

Chief Education Officer

TITLE

Notice: Requests of agencies headed by a board or commission must be approved by official action of those bodies and signed by the board or commission chairperson.

The requests of other agencies must be approved and signed by the agency director or administrator.

Agency Request

Governor's Budget

Legislatively Adopted

77<sup>th</sup> OREGON LEGISLATIVE ASSEMBLY – 2013 Session  
BUDGET REPORT AND MEASURE SUMMARY

JOINT COMMITTEE ON WAYS AND MEANS

MEASURE: SB 5548-A

Carrier – House: Rep. Komp

Carrier – Senate: Sen. Monroe

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Action: Do Pass as Amended and be Printed A-Engrossed

Vote: 19 – 6 – 1

House

Yeas: Barker, Buckley, Frederick, Huffman, Komp, Nathanson, Read, Smith, Tomei, Williamson

Nays: Freeman, Hanna, Jenson, McLane, Richardson

Exc:

Senate

Yeas: Bates, Devlin, Edwards, Girod, Hansell, Monroe, Steiner Hayward, Thomsen, Winters

Nays: Whitsett

Exc: Johnson

Prepared By: Bill McGee, Department of Administrative Services

Reviewed By: Doug Wilson, Legislative Fiscal Office

Meeting Date: June 19, 2013

Agency

Oregon Education Investment Board

Biennium  
2013-15

**Budget Summary\***

	2011-13 Legislatively Approved Budget <sup>(1)</sup>	2013-15 Current Service Level	2013-15 Committee Recommendation	Committee Change from 2011-13 Leg. Approved	
				\$ Change	% Change
General Fund	\$ 0	\$ 0	\$ 6,158,784	\$ 6,158,784	100.0%

**Position Summary**

Authorized Positions	0	0	15	15
Full-time Equivalent (FTE) positions	0.00	0.00	15.00	15.00

<sup>(1)</sup> Includes adjustments through December 2012  
 \* Excludes Capital Construction expenditures

**Summary of Revenue Changes**

The Oregon Education Investment Board is funded entirely with General Fund.

**Summary of Education Subcommittee Action**

The Oregon Education Investment Board (OEIB) was established in 2011 as a primary focus point and advisory board to both the Governor and the Legislature on education issues from pre-kindergarten through post-secondary education (P-20). The Board is chaired by the Governor. One major responsibility is to recommend strategic investments to ensure that the public education budget is integrated and is targeted to achieve the established outcomes. The OEIB appoints the State’s Chief Education Officer (CEdO) who provides the staffing for the OEIB.

For 2011-13, the budget for the OEIB and Office of the CEdO was part of the Office of the Governor. The OEIB and CEdO budgets were part of an appropriation of just less than \$3 million General Fund. For 2013-15, the OEIB is proposed to be established as a separate and independent state agency. The statutory authority for both the OEIB and CEdO are still scheduled to sunset in 2016.

The Subcommittee approved a budget of \$6,158,784 General Fund and 15.00 full-time equivalent positions. The Subcommittee took the following actions:

- Approved Package 092 that reflects the policy change in Senate Bill 822 that eliminates the increased retirement benefits resulting from Oregon income taxation of payments if the person receiving the payments does not pay Oregon income tax on those benefits and is not an

Oregon resident. The change reduces state employer contribution rates by approximately 0.3 percent. The package reduces General Fund by \$13,108.

- Approved Package 093 that reflects the policy change in Senate Bill 822 that modifies the cost-of-living adjustment under the Public Employees Retirement System. The change reduces state employer contribution rates by approximately 2.2 percent. An administrative action by the PERS board, as directed by a budget note in the SB 822 budget report, will reduce state employee contribution rates by up to an additional 1.9 percent. However, no employer rate will be reduced below its 2011-13 biennium rate. The package reduces General Fund by \$104,737.
- Approved Package 101 that provides \$4,621,042 General Fund for funding the operation of OEIB and its current staff. The package includes resources for 12 board members and 11 staff positions, including the Chief Education Officer, a chief of staff, two deputies assigned to general areas of education policy, three policy analysts or project managers, a board administrator and three support staff. The package also includes Services and Supplies funding for the general operations of the agency, \$500,000 for contracts, funding for paying the Department of Administrative Services for financial and administrative support (\$285,000), board expenses (\$24,000), travel and car allowance (\$88,000), and other costs. The Subcommittee included \$100,000 to partially fund Pension Obligation Bond liabilities that were omitted in the Governor's budget. This amount covers less than half of the estimated amount due in the 2013-15 biennium; OEIB will need to identify savings in its budget to meet the remaining part of the obligation.
- Approved Package 102 with \$705,587 General Fund that provides staff and funding to create a research unit for the P-20 educational continuum. The package includes four Research Analyst 3 positions (4.00 FTE). The Subcommittee authorized OEIB to structure the four positions within the resources provided in the package to best meet its needs.
- Approved Package 103 for \$950,000 General Fund to fund a portion of the Governor's strategic education investments that are spread among the Department of Education, the Oregon Student Access Commission and this agency. The package includes \$500,000 for grants to fund regional achievement compact convenings, \$200,000 General Fund for state education connections conferences, and \$250,000 General Fund for a statewide reading campaign.

The Subcommittee discussed strategic initiatives proposed by the Governor and included in House Bill 3232 and House Bill 3233 and adopted the following budget note.

### **Budget Note**

The Oregon Education Investment Board, the Oregon Department of Education and other education related agencies are directed to report to the Joint Committee on Ways and Means during the 2014 Legislative Session on the progress of implementing the education strategic initiatives and the Network for Quality Teaching and Learning. The report shall include at the least the following:

1. For each individual program the total amount of grants or contracts awarded or entered into, the amount of grants or contracts committed to but not awarded, and the amount of funding remaining to be committed.
2. For each individual program; a list of recipients of the grant award or contract, a short description of program or service the grant or contract was for, the target group of the program or service, the anticipated number served by the grant or contract, and the anticipated outcome of the grant or contract.
3. Any changes to law or practice that would improve the initiatives or network that should be considered by the Legislature during the 2014 or 2015 Sessions.
4. Any transfer of funding between individual programs and initiatives from the amount of funding assumed during the 2013 Session and the rationale for making each of the transfers.

### **Summary of Performance Measure Action**

As a newly established agency, OEIB does not have Key Performance Measures (KPMs) at this time. The agency has formed a good basis for determining KPMs for the future by adopting goals and associated metrics. The Subcommittee directed OEIB to propose KPMs for the 2015-17 budget using these existing measures.

DETAIL OF JOINT COMMITTEE ON WAYS AND MEANS ACTION

SB 5548-A

Oregon Education Investment Board  
Bill McGee 603-378-2078.

DESCRIPTION	GENERAL FUND	LOTTERY FUNDS	OTHER FUNDS		FEDERAL FUNDS		TOTAL ALL FUNDS	POS	FTE
			LIMITED	NONLIMITED	LIMITED	NONLIMITED			
2011-13 Legislatively Approved Budget at Dec 2012 *	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	0	0.00
2013-15 ORBITS printed Current Service Level (CSL)*	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	0	0.00
<u>SUBCOMMITTEE ADJUSTMENTS (from CSL)</u>									
SCR 001: Oregon Education Investment Board									
Package 092: PERS Taxation Policy									
Personal Services	\$ (13,108)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ (13,108)	0	0.00
Package 093: Other PERS Adjustments									
Personal Services	\$ (104,737)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ (104,737)	0	0.00
Package 101: OEIB Board and Staff									
Personal Services	\$ 3,617,926	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 3,617,926	11	11.00
Services and Supplies	\$ 1,003,116	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 1,003,116		
Package 102: Educational Research Capacity									
Personal Services	\$ 589,046	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 589,046	4	4.00
Services and Supplies	\$ 116,541	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 116,541		
Package 103: PK-20 Program Initiatives									
Services and Supplies	\$ 950,000	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 950,000		
TOTAL ADJUSTMENTS	\$ 6,158,784	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 6,158,784	15	15.00
SUBCOMMITTEE RECOMMENDATION *	\$ 6,158,784	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 6,158,784	15	15.00
% Change from 2011-13 Leg Approved Budget	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		
% Change from 2013-15 Current Service Level	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		

77<sup>th</sup> OREGON LEGISLATIVE ASSEMBLY – 2013 Regular Session  
BUDGET REPORT AND MEASURE SUMMARY

MEASURE: HB 5008-A

JOINT COMMITTEE ON WAYS AND MEANS

Carrier – House: Rep. Buckley  
Carrier – Senate: Sen. Devlin

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Action: Do Pass as Amended and as Printed A-Engrossed

Vote: 22-2-2

House

Yeas: Barker, Buckley, Frederick, Huffinan, Jenson, Komp, Nathanson, Read, Smith, Tomel, Williamson

Nays: Freeman, Hanna

Exc: McLane, Richardson

Senate

Yeas: Bates, Devlin, Edwards, Girod, Hansell, Johnson, Monroe, Steiner, Hayward, Thomsen, Whitsett, Winters

Nays:

Exc:

Prepared By: Linda Ames, Legislative Fiscal Office

Reviewed By: Daron Hill, Legislative Fiscal Office

Meeting Date: July 8, 2013

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Agency

Emergency Board

Various Agencies

Biennium

2013-15

2011-13

**2013-15 Budget Summary\***

	2011-13 Legislatively Approved Budget	2013-15 Legislatively Adopted Budget	2013-15 Committee Recommendation	Committee Change
<b><u>Emergency Board</u></b>				
General Fund - General Purpose	-	-	-	-
General Fund - Special Purpose Appropriations	-	-	\$ 30,000,000	\$ 30,000,000
State employee compensation changes	-	-	\$ 86,500,000	\$ 86,500,000
Home health care worker compensation	-	-	\$ 12,900,000	\$ 12,900,000
Oregon State Library	-	-	\$ 1,702,192	\$ 1,702,192
Department of Education - student assessments	-	-	\$ 4,600,000	\$ 4,600,000
Department of Education - youth development	-	-	\$ 1,789,557	\$ 1,789,557
Department of Housing and Community Development - Oregon Hunger Response Fund	-	-	\$ 225,000	\$ 225,000
Oregon Health Authority - A&D rate increases	-	-	\$ 3,300,000	\$ 3,300,000
Oregon Health Authority - Dental Pilots	-	-	\$ 100,000	\$ 100,000
<b><u>Various Agencies - Omnibus Adjustments</u></b>				
General Fund	-	-	\$ (190,669,103)	\$ (190,669,103)
General Fund Debt Service	-	-	\$ (761,790)	\$ (761,790)
Lottery Funds	-	-	\$ (1,719,018)	\$ (1,719,018)
Lottery Funds Debt Service	-	-	\$ (1,307,446)	\$ (1,307,446)
Other Funds	-	-	\$ (5,660,297)	\$ (5,660,297)
Federal Funds	-	-	\$ (1,629,523)	\$ (1,629,523)
<b><u>ADMINISTRATION PROGRAM AREA</u></b>				
<b><u>Department of Administrative Services</u></b>				
General Fund	-	-	\$ 1,150,000	\$ 1,150,000
Lottery Funds	-	-	\$ 21,380	\$ 21,380
Other Funds	-	-	\$ 54,596,958	\$ 54,596,958

\*Excludes Capital Construction

**2013-15 Budget Summary\***

	2011-13 Legislatively Approved Budget	2013-15 Legislatively Adopted Budget	2013-15 Committee Recommendation	Committee Change
<b><u>Office of the Governor</u></b>				
General Fund	-	-	\$ 9,174	\$ 9,174
Lottery Funds	-	-	\$ 900,000	\$ 900,000
<b><u>Department of Revenue</u></b>				
General Fund	-	-	\$ 3,196,495	\$ 3,196,495
General Fund Debt Service	-	-	\$ 1,554,716	\$ 1,554,716
Other Funds	-	-	\$ 26,903,021	\$ 26,903,021
<b><u>Secretary of State</u></b>				
General Fund	-	-	\$ 9,174	\$ 9,174
<b><u>Treasurer of State</u></b>				
Other Funds	-	-	\$ 9,174	\$ 9,174
<b><u>CONSUMER AND BUSINESS SERVICES PROGRAM AREA</u></b>				
<b><u>Bureau of Labor and Industries</u></b>				
General Fund	-	-	\$ 6,881	\$ 6,881
Other Funds	-	-	\$ 2,293	\$ 2,293
<b><u>ECONOMIC AND COMMUNITY DEVELOPMENT PROGRAM AREA</u></b>				
<b><u>Oregon Business Development Department</u></b>				
General Fund Debt Service	-	-	\$ 280,954	\$ 280,954
Lottery Funds	-	-	\$ 1,374,525	\$ 1,374,525
Other Funds	-	-	\$ 29,752,779	\$ 29,752,779
Other Funds Non-limited	-	-	\$ 12,000,000	\$ 12,000,000
<b><u>Housing and Community Services Department</u></b>				
General Fund	-	-	\$ 225,000	\$ 225,000
Other Funds	-	-	\$ 5,076,190	\$ 5,076,190

\*Excludes Capital Construction

**2013-15 Budget Summary\***

	2011-13 Legislatively Approved Budget	2013-15 Legislatively Adopted Budget	2013-15 Committee Recommendation	Committee Change
<b><u>Department of Veterans' Affairs</u></b>				
General Fund Debt Service	-	-	\$ 852,814	\$ 852,814
Other Funds	-	-	\$ 65,000	\$ 65,000
<b><u>EDUCATION PROGRAM AREA</u></b>				
<b><u>Department of Education</u></b>				
General Fund	-	-	\$ (8,826,545)	\$ (8,826,545)
Lottery Funds	-	-	\$ 12,826,545	\$ 12,826,545
Other Funds	-	-	\$ 12,000,000	\$ 12,000,000
Federal Funds	-	-	\$ 1,000,000	\$ 1,000,000
<b><u>Department of Community Colleges and Workforce Development</u></b>				
Other Funds	-	-	\$ (307,051)	\$ (307,051)
Other Funds Debt Service	-	-	\$ 307,051	\$ 307,051
<b><u>Oregon Health and Science University</u></b>				
General Fund	-	-	\$ 1,000,000	\$ 1,000,000
<b><u>Higher Education Coordinating Commission</u></b>				
General Fund	-	-	\$ 859,630	\$ 859,630
<b><u>Oregon University System</u></b>				
General Fund	-	-	\$ 15,674,000	\$ 15,674,000
<b><u>HUMAN SERVICES PROGRAM AREA</u></b>				
<b><u>Oregon Health Authority</u></b>				
General Fund	-	-	\$ (1,940,000)	\$ (1,940,000)
Other Funds	-	-	\$ (3,160,291,391)	\$ (3,160,291,391)
Other Funds Nonlimited	-	-	\$ 3,160,291,391	\$ 3,160,291,391

\*Excludes Capital Construction

2013-15 Budget Summary\*

	2011-13 Legislatively Approved Budget	2013-15 Legislatively Adopted Budget	2013-15 Committee Recommendation	Committee Change
<u>Department of Human Services</u>				
General Fund				
Other Funds			\$ 5,000,000	\$ 5,000,000
Federal Funds			\$ 1,000,000	\$ 1,000,000
			\$ 9,700,000	\$ 9,700,000
<u>Long Term Care Ombudsman</u>				
General Fund			\$ 785,488	\$ 785,488
<u>JUDICIAL BRANCH</u>				
<u>Judicial Department</u>				
General Fund				
Other Funds			\$ 634,980	\$ 634,980
			\$ 335,001	\$ 335,001
<u>Public Defense Services Commission</u>				
General Fund			\$ 2,409,367	\$ 2,409,367
<u>LEGISLATIVE BRANCH</u>				
<u>Legislative Administration Committee</u>				
General Fund Debt Service				
Other Funds			\$ 1,421,341	\$ 1,421,341
			\$ 615,000	\$ 615,000
<u>NATURAL RESOURCES PROGRAM AREA</u>				
<u>State Department of Agriculture</u>				
General Fund			\$ 34,060	\$ 34,060
Lottery Funds			\$ (21,380)	\$ (21,380)
<u>Columbia River Gorge Commission</u>				
General Fund			\$ (79,873)	\$ (79,873)
<u>Department of Land Conservation and Development</u>				
General Fund			\$ 196,000	\$ 196,000

\*Excludes Capital Construction

**2013-15 Budget Summary\***

	<u>2011-13 Legislatively Approved Budget</u>	<u>2013-15 Legislatively Adopted Budget</u>	<u>2013-15 Committee Recommendation</u>	<u>Committee Change</u>
<u>Department of Environmental Quality</u> Other Funds Debt Service	-	-	\$ (17,140,278)	\$ (17,140,278)
<u>State Department of Energy</u> Other Funds	-	-	\$ 9,876,190	\$ 9,876,190
<u>State Department of Fish and Wildlife</u> General Fund	-	-	\$ 115,940	\$ 115,940
<u>State Forestry Department</u> Other Funds Federal Funds	-	-	\$ 120,000 \$ 3,000,000	\$ 120,000 \$ 3,000,000
<u>Parks and Recreation Department</u> Other Funds	-	-	\$ 5,069,882	\$ 5,069,882
<u>Department of State Lands</u> Other Funds Federal Funds	-	-	\$ 307,360 \$ 135,000	\$ 307,360 \$ 135,000
<u>Water Resources Department</u> Other Funds	-	-	\$ 10,242,513	\$ 10,242,513
<b><u>PUBLIC SAFETY PROGRAM AREA</u></b>				
<u>Department of Corrections</u> General Fund	-	-	\$ 2,340,830	\$ 2,340,830
<u>Oregon Criminal Justice Commission</u> General Fund	-	-	\$ 10,190,000	\$ 10,190,000
<u>Department of Justice</u> General Fund General Fund Debt Service Other Funds Federal Funds	-	-	\$ 3,683,276 \$ 1,601,856 \$ 14,377,862 \$ 27,447,707	\$ 3,683,276 \$ 1,601,856 \$ 14,377,862 \$ 27,447,707

\*Excludes Capital Construction

**2013-15 Budget Summary\***

	2011-13 Legislatively Approved Budget	2013-15 Legislatively Adopted Budget	2013-15 Committee Recommendation	Committee Change
<b><u>Oregon Military Department</u></b>				
General Fund	-	-	\$ 290,000	\$ 290,000
General Fund Debt Service	-	-	\$ 314,523	\$ 314,523
Other Funds	-	-	\$ 237,345	\$ 237,345
<b><u>Oregon State Police</u></b>				
General Fund	-	-	\$ 3,387,000	\$ 3,387,000
<b><u>Department of Public Safety Standards and Training</u></b>				
Other Funds	-	-	\$ 1,000,000	\$ 1,000,000
<b><u>Oregon Youth Authority</u></b>				
General Fund	-	-	\$ 126,673	\$ 126,673
Other Funds Debt Service	-	-	\$ 384,877	\$ 384,877
<b><u>TRANSPORTATION PROGRAM AREA</u></b>				
<b><u>Department of Transportation</u></b>				
General Fund Debt Service	-	-	\$ (757,944)	\$ (757,944)
Other Funds	-	-	\$ 56,885,788	\$ 56,885,788
<hr/>				
<b>2013-15 Budget Summary</b>				
General Fund Total	-	-	\$ (4,568,334)	\$ (4,568,334)
Lottery Funds Total	-	-	\$ 12,074,606	\$ 12,074,606
Other Funds Total	-	-	\$ 218,056,658	\$ 218,056,658
Federal Funds Total	-	-	\$ 39,653,184	\$ 39,653,184

\*Excludes Capital Construction

2011-13 Supplemental Appropriations

	<u>2011-13 Legislatively Approved Budget</u>	<u>2011-13 Committee Recommendation</u>	<u>Committee Change</u>
<u>Emergency Board</u> General Fund		\$ (50,447,306)	\$ (50,447,306)
<u>Oregon University System</u> Other Funds		\$ (2,329,480,585)	\$ (2,329,480,585)
Other Funds Non-limited		\$ (2,236,635,139)	\$ (2,236,635,139)
<u>Military Department</u> General Fund		\$ (460,000)	\$ (460,000)
General Fund Debt Service		\$ (26,748)	\$ (26,748)
<u>Oregon Youth Authority</u> General Fund		\$ 200,000	\$ 200,000

2013-15 Position Summary

	<u>2011-13 Legislatively Approved Budget</u>	<u>2013-15 Legislatively Adopted Budget</u>	<u>2013-15 Committee Recommendation</u>	<u>Committee Change</u>
<u>Office of the Governor</u>				
Authorized Positions	-	-	-	-
Full-time Equivalent (FTE) positions	-	-	3	3
			3.00	3.00
<u>Department of Revenue</u>				
Authorized Positions	-	-	-	-
Full-time Equivalent (FTE) positions	-	-	31	31
			91.00	31.00
<u>Oregon Business Development Department</u>				
Authorized Positions	-	-	-	-
Full-time Equivalent (FTE) positions	-	-	3	3
			3.00	3.00
<u>Department of Education</u>				
Authorized Positions	-	-	-	-
Full-time Equivalent (FTE) positions	-	-	3	3
			3.38	3.38
<u>Higher Education Coordinating Commission</u>				
Authorized Positions	-	-	-	-
Full-time Equivalent (FTE) positions	-	-	6	6
			3.69	3.69
<u>Long Term Care Ombudsman</u>				
Authorized Positions	-	-	-	-
Full-time Equivalent (FTE) positions	-	-	8	8
			3.81	3.81
<u>Department of Corrections</u>				
Authorized Positions	-	-	-	-
Full-time Equivalent (FTE) positions	-	-	-197	-197
			-65.31	-65.31
<u>Criminal Justice Commission</u>				
Authorized Positions	-	-	-	-
Full-time Equivalent (FTE) positions	-	-	1	1
			0.88	0.88

**2013-15 Position Summary**

	<u>2011-13 Legislatively Approved Budget</u>	<u>2013-15 Legislatively Adopted Budget</u>	<u>2013-15 Committee Recommendation</u>	<u>Committee Change</u>
<b><u>Oregon State Police</u></b>				
Authorized Positions	-	-	15	15
Full-time Equivalent (FTE) positions	-	-	4.38	4.38
<b><u>Department of Public Safety Standards and Training</u></b>				
Authorized Positions	-	-	4	4
Full-time Equivalent (FTE) positions	-	-	3.52	3.52
<b><u>Department of Transportation</u></b>				
Authorized Positions	-	-	2	2
Full-time Equivalent (FTE) positions	-	-	2.00	2.00

## Summary of Revenue Changes

The General Fund appropriations made in the bill are within resources available as projected in the May 2013 economic and revenue forecast by the Department of Administrative Services Office of Economic Analysis, supplemented by transfers from various agency accounts to the General Fund for general governmental purposes as authorized in House Bill 2322, plus other actions to reduce state agency expenditures.

## Summary of Capital Construction Subcommittee Action

House Bill 5008 appropriates General Fund to the Emergency Board for general purpose and targeted special purpose appropriations, and makes other adjustments to individual agency budget and position authority as described below.

### Emergency Board

The Emergency Board allocates General Fund and provides Lottery Funds, Other Funds, and Federal Funds expenditure limitation to state agencies for unanticipated needs in approved agency budgets when the Legislature is not in session. The Subcommittee appropriated \$30 million General Fund to the Emergency Board for general purposes.

House Bill 5008 makes eight special purpose appropriations to the Emergency Board, totaling \$111.1 million General Fund:

- \$86.5 million General Fund for allocation to state agencies for state employee compensation changes.
- \$12.9 million General Fund for allocation to state agencies for compensation changes for home health care workers who are not state employees.
- \$1,702,192 General Fund for second year operational costs for the Oregon State Library. The 2013-15 budget for the State Library provides for only one year of budget authority for the agency (see House Bill 5022). The release of this appropriation, by either the Legislature or the Emergency Board, is contingent on a successful reorganization plan being submitted and approved by the Legislature in 2014.
- \$4.6 million for the Department of Education for costs over and above the amount included in the Department's budget bill (Senate Bill 5518) relating to assessments and other resources aligned to common core standards including those assessments required under the federal Elementary and Secondary Education Act (ESEA). The Department of Education must report on what assessments it plans to implement and on the most current estimates of the costs for each component of the assessment when making the request for this special purpose appropriation.
- \$1,789,557 General Fund for the Department of Education's Youth Development Division. This amount represents program funding for the second year of the biennium for youth development grants, performance-based contracts, and services provided at the local level. Prior to requesting this special purpose appropriation, the Youth Development Council will report back to the Joint Committee on Ways and Means during the 2014 Legislative Session with a plan for investing and distributing these funds. The plan must take into account (1) the furtherance of the policy directives and youth academic and developmental outcomes outlined in House Bill 3231; (2) Oregon's

40/40/20 educational goals; and (3) the Oregon Education Investment Board's Strategic Plan. In developing this plan, the Youth Development Council shall consult with representatives of youth, parents, schools, service providers, labor, business, local governments, tribal governments, and communities.

- \$225,000 General Fund one-time funding for the Oregon Hunger Response Fund, for allocation to the Housing and Community Services Department after receipt of the agency's report on alternate, sustainable service delivery models, pursuant to a budget note.
- \$3.3 million General Fund for the Oregon Health Authority for adult residential room and board rate increases within the alcohol and drug system, after receipt of the agency's study on both the youth and adult system, during the 2014 legislative session. Based on the findings of that study, some or all of this funding could be allocated at that time.
- \$100,000 General Fund for the Oregon Health Authority for staffing needs related to the Dental Pilot Projects. These projects were established in Senate Bill 738 (2011), but no funding was provided. While the funding for the pilots is expected to come from foundations and private funders, the agency needs staff to manage the program.

If these special purpose appropriations are not allocated by the Emergency Board before December 1, 2014, any remaining funds become available to the Emergency Board for general purposes.

### Adjustments to Approved 2013-15 Budgets

#### OMNIBUS ADJUSTMENTS

Omnibus adjustments reflect budget changes in multiple agencies based on reductions in Department of Administrative Services' assessments and charges for services, a reduction to the Attorney General rates, an increase resulting from a new Secretary of State Archives assessment, and debt service adjustments. Also included is a 5% reduction to services and supplies (excluding the fixed costs of State Government Service Charges, Attorney General charges, rent, and fuel and utilities) that is applied to General Fund and certain Lottery Funds only. Total savings are \$36.5 million General Fund, \$1.7 million Lottery Funds, \$5.7 million Other Funds, and \$1.6 million Federal Funds.

Omnibus adjustments also include a 2% supplemental ending balance holdback that is applied primarily to General Fund, and excludes debt service as well as selected programs. This reduction may be restored during the 2014 legislative session depending on statewide economic conditions. Agency detail for this adjustment is shown in Attachment A. Total budget reductions include \$154.9 million General Fund and \$1.4 million Lottery Funds.

Another statewide adjustment, which is included in agency-budget bills and not in House Bill 5008, affects most state agencies. Package 091 (Statewide Administrative Savings) is a placeholder for administrative efficiencies and associated budget reductions in finance, information technology, human resources, accounting, payroll, and procurement expenditures. The Subcommittee affirmed that the reductions, at \$62.0 million total funds, are permanent and ongoing as they reflect fundamental changes in business processes. The Department of Administrative Services (DAS) will continue to work on details of these reductions with agencies and report to the Joint Committee on Ways and Means during the 2014 session. Agencies should direct concerns regarding permanency or implementation of the reductions to DAS. The Department will include a plan for resolving any issues related to these reductions as part of its 2014 report.

## ADMINISTRATION

### Oregon Department of Administrative Services

House Bill 5008 includes one-time General Fund appropriations to the Department of Administrative Services (DAS) for the following purposes:

- \$500,000 to the East Valley Water District to support completion of an environmental impact study on a proposed water storage project.
- \$250,000 to the Historic Public Market Foundation to assist with development of the James Beard Public Market in Portland.
- \$400,000 for distribution to 211info, which is a statewide, nonprofit information and referral service for community and social services. The state currently supports about one-third of the organization's operating budget, primarily through contracts with individual state agency programs for specific services. 211info also receives funding from local governments, other nonprofits, grants, and foundations. This direct General Fund appropriation is intended to help 211info maintain statewide program access over the 2013-15 biennium. An additional request to support around-the-clock operations was not funded; right now 211info operates Monday through Friday from 8 am to 6 pm. To gain a better understanding of how state agencies can most effectively use 211info and to provide the legislature information to help evaluate potential future funding requests, the Subcommittee adopted a budget note:

#### Budget Note:

The Department of Administrative Services shall work with other state agencies to identify all information and referral services for state government, with a primary focus on help lines (for example, 1-800 numbers). The Department will submit a report to the Joint Committee on Ways and Means during the 2014 legislative session summarizing the purpose, scope, and cost of each service. For each state agency currently using 2-1-1, the report shall also provide information on the service(s) being provided, including but not limited to, contract provisions, utilization, benefits, costs, and budget. Finally, the report shall include an analysis of potential cost savings or efficiencies that might be achieved by broader use of 2-1-1.

The Subcommittee added \$27,100,007 Other Funds expenditure limitation for one-time cost of issuance and special payments associated with the disbursement of proceeds from several Lottery Bond sales; projects are detailed below and approved in the Lottery Bond bill (Senate Bill 5533). There is no debt service in the 2013-15 biennium as the bonds will not be sold until the spring of 2015. Debt service in 2015-17 is calculated at a total of \$4,882,645 Lottery Funds: \$2,193,283 for the Lane Transit project; \$1,835,741 for the Portland Convention Center hotel project; \$637,464 for the Confederated Tribes of Umatilla; and \$216,157 for the North Central Education Service District project.

- \$10,239,248 Other Funds for disbursement to Metro for the purpose of assisting with the development of a hotel near the Portland Convention Center.
- \$3,562,986 Other Funds for disbursement to the Confederated Tribes of Umatilla for construction a 1.5 mile road extension from the Port of Umatilla into the Confederated Tribes of Umatilla, which will open additional industrial land for development.
- \$1,042,755 Other Funds for disbursement to North Central Education Service District for partial funding of digital switch technology acquisition that would serve the educational and public safety needs of Wheeler, Gilliam, and Sherman Counties.
- \$12,255,018 Other Funds for disbursement to the Lane Transit District for the West Eugene EmX extension project.

House Bill 5008 includes Other Funds expenditure limitations for the following purposes:

- \$400,000 one-time Other Funds increase to support a DAS contract with the Province of British Columbia on behalf of Multnomah County. The county wants to contract with Partnerships BC, which is a government-owned infrastructure development company, to develop a business case for a new Multnomah County Courthouse. Oregon counties are prohibited from contracting with foreign governments, but the state is allowed. This contract will be issued outside the normal, competitive procurement process because under ORS 190 DAS may enter into intergovernmental agreements with foreign governments and bypass this process. Multnomah County will pay for the planning work through DAS to Partnerships BC.
- \$2,955,118 Other Funds increase to the Enterprise Asset Services budget unit to correct a mistake when too much services and supplies expenditure limitation was inadvertently removed from the program in House Bill 5002, the budget bill for the Department of Administrative Services.
- \$24,141,833 one-time increase to the Shared Services Fund to accommodate first year payments from the Fund to counties. In 2007 the Legislature established a new program, the Shared Services Fund, to provide state support to local taxing districts affected by participation in the Strategic Investment Program. Local taxing districts are now eligible to receive payments from the state that are calculated to equal 50% of the personal income tax revenue attributable to the earnings of persons employed as result of a SIP property tax exemption. These payments would otherwise have gone to the state General Fund.

The Subcommittee increased Lottery Funds by \$21,380 to reflect additional Lottery Funds for County Fairs support. The funding is available due to the termination of the County Fair Commission, for which the Department of Agriculture had received Lottery Funds for minimal administrative support of Commission operations.

The Subcommittee also added the following budget note on how to best meet the information technology needs of small state agencies:

**Budget Note:**

The Department of Administrative Services is directed to report back to the February 2014 Legislative Session with a plan to address the specific needs of smaller (<300 FTE) agencies with regard to Information Technology and Telecommunications Management. The Department shall also report on resources that will be necessary to implement such a plan and how those resources would be funded.

**Office of the Governor**

A \$900,000 Lottery Funds limitation and three limited duration Principal Executive/Manager F positions (3.00 FTE) are added to the Office of the Governor. These positions will focus on streamlining the permitting process for significant projects across all levels of government; federal, state, county and city.

The Subcommittee approved budget adjustments for an increase in the statutorily set salary for statewide elected officials as provided for in House Bill 2322. The statewide elected officials include the Governor, Secretary of State, State Treasurer, Attorney General, and the Commissioner of Labor and Industries. Each is to receive a salary increase of \$5,000 per year, beginning on January 1, 2014. The impact on the Office of the Governor is an increase of \$9,174 General Fund, including other payroll expenses. Statewide elected officials last received a salary

increase in July of 2009. Statutory Judgeships are also to receive a salary increase (see Judicial Branch program area narrative). The compensation for members of the Legislative Assembly remains unchanged.

The following budget note was approved:

Budget Note:

The Joint Committee on Ways and Means approved a budget with House Bill 5028, the budget bill for the Oregon Business Development Department, that concerned the Regional Solutions program. That budget note is repealed, and the following, also concerning the Regional Solutions program, is adopted.

The Transportation and Economic Development Subcommittee approved a \$1 Other Funds expenditure limitation for the Oregon Business Development Department for Regional Solutions. Prior to legislative approval of any increase in the expenditure limitation for this program, the Office of the Governor shall report to the Interim Joint Committee on Ways and Means with a request to introduce a bill, for consideration during the 2014 Session of the Legislative Assembly, to establish the Regional Solutions program. In addition to any other provisions in this report that the Governor may include, the report shall include requested provisions to: provide for the establishment of Regional Solutions Centers; identify the membership, governance and duties of the Centers; establish criteria on the use of funds allocated to the program; define the process for the development and approval of funding proposals; establish authority for the Oregon Business Development Department to distribute moneys to projects funded under the program and to provide effective oversight of the uses of the moneys so distributed; and delineate the activities and responsibilities of the Oregon Business Development Department for administering the program. The Office of the Governor shall submit this report to the Interim Joint Committee on Ways and Means no later than during the Legislative Days in November 2013.

Department of Revenue

The Subcommittee approved funding for the implementation of the replacement of the agency's core information technology applications (Core System Replacement project). The estimated one-time cost of implementation totals \$70.9 million and is scheduled to be fully completed by the 2017-19 biennia. Overall, the project will be funded with \$12.5 million of General Fund and \$58.4 million of Article Q-bonds. General Fund will provide for Debt Service repayment. Ongoing costs are roughly estimated at 2-3 times the initial one-time costs.

For the 2013-15 biennium, the Subcommittee approved \$26.5 million of Other Funds expenditure limitation for development costs, which will be financed with Article XI-Q bonds approved in House Bill 5506. Personal Services are increased by \$6.0 million Other Funds (31 positions/31.00 FTE), \$18.8 million Other Funds for Services and Supplies, and \$1.7 million for Capital Outlay. Major costs include: \$11.3 million for vendor contract payments; \$1 million for vendor contracted maintenance; \$1.5 million for an independent quality assurance/control vendor; and \$3 million in vendor contract contingency costs.

Unless otherwise approved by the Legislature or the Emergency Board, the positions budgeted for the Core System Replacement project are established as permanent full-time positions under the following conditions: (a) the positions will be abolished on or before the completion of the project; (b) the positions are to remain in the Core System Replacement program (i.e., CSR summary cross reference) and may not be transferred to any other program or used for any other purpose other than the development to the Core System Replacement project; and (c) the positions may not to be included in any permanent finance plan action.

The Subcommittee appropriated \$3.6 million General Fund for the agency's payments to the Department of Administrative Services for State Data Center charges and for vendor contract maintenance costs to support the ongoing maintenance of the vendor product after installation.

The Subcommittee appropriated \$1.6 million in General Fund Debt Service to support repayment of Article XI-Q General Obligation bond proceeds approved in SB 5506. General Fund Debt Service for the 2015-17 biennium will total \$10.1 million. Other Funds expenditure limitation of \$521,182 is included for the cost of issuance of the bonds.

The Department of Administrative Services is requested to unschedule \$13 million of Other Funds expenditure limitation related to the May 2014 Article XI-Q bond sale pending a Department of Revenue report to the Legislature in 2014 on the status of the project.

The Subcommittee adopted the following budget note:

**Budget Note:**

The Department of Revenue (DOR) is directed to work with the Department of Administrative Services (DAS) in the development and implementation of the Core Systems Replacement Project. DAS is to provide DOR with the oversight of the project, including support for project management, information technology systems development lifecycle, procurement, quality assurance, and other needs to successfully complete this project.

DOR is to submit updated key foundational project management documentation, each accompanied by an independent quality control review, to Legislative Fiscal Office (LFO) on or before February 1, 2014, as available for review.

DOR and DAS are directed to report to LFO every six months through the biennium on the status of the project using DOR's standard project management reports as well as provide copies of all Quality Assurance and Quality Control and Independent Verification and Validation reports upon their receipt by the agency.

The Subcommittee disappropriated \$440,937 General Fund and reduced Other Funds expenditure limitation by \$146,979 from the Administration program due to the passage of Senate Bill 184, which allows for agencies to send notification by first class mail, or in some cases by an alternative method such as e-mail, in lieu of certified mail. The reduction is the difference in cost between certified mail and first class postage that is estimated to be realized by the agency.

**Secretary of State**

The Subcommittee approved budget adjustments for an increase in the statutorily set salary for statewide elected officials as provided for in House Bill 2322. The statewide elected officials include the Governor, Secretary of State, State Treasurer, Attorney General, and the Commissioner of Labor and Industries. Each is to receive a salary increase of \$5,000 per year, beginning on January 1, 2014. The impact on the Secretary of State is an increase of \$9,174 General Fund, including other payroll expenses. Statewide elected officials last received a salary increase in July of 2009. Statutory Judgeships are also to receive a salary increase (see Judicial Branch program area narrative). The compensation for members of the Legislative Assembly remains unchanged.

#### Treasurer of State

The Subcommittee approved budget adjustments for an increase in the statutorily set salary for statewide elected officials as provided for in House Bill 2322. The statewide elected officials include the Governor, Secretary of State, State Treasurer, Attorney General, and the Commissioner of Labor and Industries. Each is to receive a salary increase of \$5,000 per year, beginning on January 1, 2014. The impact on the Treasurer is an increase of \$9,174 Other Funds expenditure limitation, including other payroll expenses. Statewide elected officials last received a salary increase in July of 2009. Statutory Judgeships are also to receive a salary increase (see Judicial Branch program area narrative). The compensation for members of the Legislative Assembly remains unchanged.

### **CONSUMER AND BUSINESS SERVICES**

#### Bureau of Labor and Industries

The Subcommittee approved budget adjustments for an increase in the statutorily set salary for statewide elected officials as provided for in House Bill 2322. The statewide elected officials include the Governor, Secretary of State, State Treasurer, Attorney General, and the Commissioner of Labor and Industries. Each is to receive a salary increase of \$5,000 per year, beginning on January 1, 2014. The impact on the Bureau of Labor and Industries is an increase of \$6,881 General Fund and \$2,293 Other Funds expenditure limitation, including other payroll expenses. Statewide elected officials last received a salary increase in July of 2009. Statutory Judgeships are also to receive a salary increase (see Judicial Branch program area narrative). The compensation for members of the Legislative Assembly remains unchanged.

### **ECONOMIC AND COMMUNITY DEVELOPMENT**

#### Oregon Business Development Department

The Subcommittee increased the General Fund appropriation by \$280,954, to fully-fund 2013-15 biennium debt service costs for Article XI-Q general obligation bonds issued to finance Innovation Infrastructure projects. Debt service costs are higher than originally projected, because the bonds are not eligible to be issued on a tax-exempt basis. This increase will provide a total of \$694,286 General Fund to pay 2013-15 biennium debt service costs on the \$5,000,000 project. Debt service costs will increase to \$1.4 million in the 2015-17 biennium.

The Subcommittee established two new Lottery Funds expenditure limitations, and approved the establishment of three full-time, limited-duration positions (3.00 FTE). The first Lottery Funds expenditure limitation of \$1,124,525 supports three limited-duration positions housed in the Shared Services/Central Pool program area, and associated services and supplies costs. These include two positions in regional governance solutions and one position for West Coast Strategies. The second newly-established Lottery Funds expenditure limitation provides \$250,000 for Business, Innovation and Trade for an ongoing Economic Gardening services pilot project. Both of these Lottery Funds expenditure limitations are approved on a one-biennium basis, and will be phased out in the development of the Department's 2015-17 biennium current service level budget.

The bill includes several budget adjustments to allow expenditures of bond proceeds authorized for the Department by Senate Bill 5506 and Senate Bill 5533, and payment of the costs of issuing those bonds. The Other Funds expenditure limitation for the cost of issuing Article XI-Q bonds for the agency is reduced by \$115,000, and the Other Funds expenditure limitation for the cost of issuing lottery revenue bonds for the re-

capitalization of the Special Public Works Fund is reduced by \$132,221 from the levels approved in House Bill 5028, the Department's budget bill. These adjustments will provide expenditure limitation of \$120,000 for the cost of issuing the Article XI-Q bonds, and \$258,580 for the cost of issuing the lottery revenue bonds. These costs will be funded from bond proceeds.

The Subcommittee increased the Other Funds expenditure limitation for the seismic rehabilitation grant program by \$30,000,000 to permit expenditure of bond proceeds approved for that program. Finally, the Subcommittee increased the agency's Nonlimited Other Funds expenditures in the Infrastructure Finance Authority by \$12,000,000 for expenditure of lottery revenue bond proceeds transferred to the Special Public Works Fund. Loan award expenditures from the Special Public Works Fund are not limited in the Department's budget.

#### Housing and Community Services Department

The Subcommittee approved Other Funds expenditure limitation to enable the Department to expend \$5 million in bond proceeds and \$76,190 for cost of issuance for preservation of existing affordable housing. The funds will help provide financing for the acquisition of affordable housing properties with expiring subsidies from owners who do not wish to renew their federal contracts; the properties will be acquired by new owners who commit to keeping them affordable to low-income Oregonians, rather than having the units convert to market-rate housing. The proceeds are anticipated to provide gap financing to preserve an estimated 200 units of affordable housing. The bonds are included in Senate Bill 5533:

The bill includes \$225,000 General Fund for one-time funding for the Oregon Hunger Response Fund for the first year of the biennium. An additional \$225,000 General Fund is included as a special purpose appropriation to the Emergency Board.

#### Department of Veterans' Affairs

Expenditure limitation is provided to the Oregon Department of Veterans' Affairs for cost of issuance in the amount of \$65,000 Other Funds, and a General Fund appropriation for debt service in the amount of \$502,814, related to the issuance of \$4 million in Article XI-Q bonds for completion of construction of a second Veterans' Home skilled nursing facility in Linn County. Other and Federal Funds Capital Construction expenditure limitation to spend the Article XI-Q bonds and federal matching funds from the U.S. Department of Veterans' Affairs is included in Senate Bill 5507.

A one-time General Fund appropriation of \$350,000 is made to the Oregon Department of Veterans' Affairs for veterans' suicide prevention and crisis intervention telephone counseling services, allocated pursuant to the following budget note:

#### Budget Note:

The Oregon Department of Veterans' Affairs shall establish a veterans' crisis suicide line that offers free, anonymous assistance, 24 hours a day, to active-duty service members, veterans and their families. The Department shall establish an RFP process for the line to contract with a provider that has a contractual affiliation with the National Suicide Prevention Line and the National Veteran's Crisis Line, and has capacity to answer at least 30,000 veteran or suicide calls per year. The Department shall establish the line within 90 days of passage.

## EDUCATION

### Department of Education

The State School Fund is adjusted in this bill to reflect a rebalance of statewide resources, decreasing General Fund and increasing Lottery Funds expenditure limitation by \$12,826,545.

The Other Funds expenditure limitation of the Department of Education for the Grant-in-Aid budget unit is increased by \$11,341,084 and the Other Funds expenditure limitation for the Operations unit of the Department of Education is increased by \$658,916 for increased resources for the Network of Quality Teaching and Learning. The funding is contingent on the increased distribution of up to \$12 million from the Common School Fund over and above the standard distribution according to the policy adopted by the State Land Board on April 14, 2009. The increased resources for the Network will be used for grants, contracts and other assistance distributed to school districts, education service districts, and other entities as well as for agency staffing and associated costs for the following components of the Network: (1) \$2.6 million for Educator Effectiveness, (2) \$1.2 million for Student Centered Learning, (3) \$500,000 for Educator Preparation, (4) \$1.0 million for Closing the Achievement Gap, (5) \$2.2 million for Aligning Professional Development Plans to School Improvement Objectives and Educators' Needs, and (6) \$4.5 million for Supporting Implementation of Common Core Standards. Three new limited duration positions are established (two Education Program Specialist 2 and a Program Analyst 4) and the FTE is increased on two other Program Analyst 4 positions for a total FTE increase of 3.38 FTE. This \$12 million increase is a one-time increase for only the 2013-15 biennium.

The Subcommittee approved an increase of \$2.0 million General Fund in the amount appropriated for the strategic initiatives in the grant-in-aid budget unit. These additional funds are for an increase in resources for the Seamless Transitions policy package (package 305) for collaboration or consortiums of post-secondary institutions and school districts to increase the award of college or community college credits for high school students. The combined funding of this \$2.0 million and the \$2.0 million appropriated for this purpose in Senate Bill 5518, is to be used to support the Eastern Promise consortium and the expansion of consortiums into other regions of the state.

The bill includes \$1.5 million General Fund for Student Achievement Improvement Grants established in House Bill 2322. The Department of Education is to award at least two grants per congressional district to schools considered high poverty under Title I of the federal Elementary and Secondary Act, serving students in grades Kindergarten to 8<sup>th</sup> grade that are in the bottom five percent of all schools based on the rating system used by the Department for academic performance. The funds are to be used to hire at least one licensed teacher at the school. The grant program is only authorized for the 2013-15 biennium.

The following budget notes were approved:

#### Budget Note:

The Oregon Department of Education is instructed to report to the Interim Joint Committee on Ways and Means before January 1, 2014 on progress on implementing its 2013-15 strategic plan. This first report is to be a baseline for future reports to the Legislature for measuring the success of transforming the agency to focus more on assisting and collaborating with educational partners, closing the achievement gaps, and being more "results-focused." The report should include the following:

1. A breakdown of the agency's education programs and services with a description of each program and service, including overall purpose, description of federal or state laws or rule that govern the program, target group served, overall funding by fund type, amount of program funding, amount of staff resources dedicated to the program based on FTE, amount spent on administrative costs at the state level, and description of measurements use to gauge the performance of the program or service.
2. Actions taken by the agency in the past six months to become more collaborative with partners and to improve customer service.
3. Actions taken by the agency in the past six months to increase the share of funding the agency receives that is passed through to educational partners.
4. Comparison of the staffing levels and operations of the Oregon Department of Education with education agencies in other states with similar missions and responsibilities.
5. Description of changes in the overall measures and metrics established by the agency as part of its strategic plan development.

The Department will consult with the Legislative Fiscal Office in determining the level of detail included in item #1 above and how specific the program level that should be in the report to the Legislature. In addition to the report due by January 1, 2014, the Department is instructed to provide updated information on the items above during the budget presentation to the Joint Committee on Ways and Means during the 2015 Legislative Session.

**Budget Note:**

The Department of Education shall not purchase or acquire the interim item bank and related assessments from Smarter Balance Assessment Consortium. The Department shall provide each district with available funds to administer a locally selected and established interim growth assessment system for students in grades Kindergarten through ninth that is capable of informing instruction and measuring student academic performance against a stable scale irrespective of grade level.

The Subcommittee approved an increase of \$500,000 General Fund for the Farm to School program described in ORS 336.431. This program enables schools to offer fresh, locally sourced products and to promote mutually beneficial educational activities, and focus on children's long-term health habits. In addition, Federal Funds expenditure limitation for early learning programs was increased by \$1.0 million to reflect a larger carry-forward of child care related funds from 2011-13.

**Department of Community Colleges and Workforce Development**

A specific Other Funds expenditure limitation for debt service for Article XI-G bonds is established in the amount of \$307,051 for the Department of Community Colleges and Workforce Development. A corresponding reduction in another Other Funds expenditure limitation for the Department is made for a net change of zero across the entire agency.

**Oregon Health and Science University**

House Bill 5008 includes a General Fund appropriation of \$1,000,000 through the Department of Administrative Services, for the Primary Health Care Loan Forgiveness Program in the Office of Rural Health at the Oregon Health and Science University. This program provides loans to eligible primary care practitioners enrolled in an approved rural-specific Oregon training Program, and was established in 2011. This provides additional funding for the 2013-15 biennium.

#### Higher Education Coordinating Commission

The Subcommittee approved an increase of \$859,630 General Fund for the budget for the Higher Education Coordinating Commission (HECC) to reflect the added responsibilities of House Bill 3120 and Senate Bill 270. Both of these bills are related to post-secondary education governance. This funding is in addition to the amount already included in House Bill 5033, the budget bill for the HECC. This funding will be used to fund six permanent positions (3.69 FTE) – a manager, two Operations/Policy Analyst 4 positions, two Education Program Specialist 2 positions, and one Procurement and Contract Specialist 3 position. The manager position is budgeted to start in October of 2013 with the remaining positions to start in April 2014. The following budget note was approved:

#### Budget Note:

Prior to final adoption of any significant change to the distribution of the Community College Support Fund, the Higher Education Coordinating Commission is directed to consult with the appropriate legislative committees including the interim policy committees with jurisdiction on post-secondary education issues and the interim Joint Committee on Ways and Means or Emergency Board on the proposed distribution change.

#### Oregon University System

The Subcommittee increased the General Fund appropriation for public university support by \$15,000,000 with direction that the money be used to reduce resident undergraduate tuition increases at the state's seven public universities. The Subcommittee adopted the following budget note to limit tuition increases on resident undergraduate students:

#### Budget Note:

In adopting the budget for the Oregon University System, the Legislature intends that increases in the base rates for tuition paid by resident undergraduate students on all seven campuses and one branch campus (EOU, OIT, OSU, OSU-Cascades, PSU, SOU, UO and WOU) may not exceed an average of 3.5% at any individual campus in any given year of the 2013-15 biennium. For students choosing the Tuition Promise program at WOU, rates of increase over the prior cohort may not exceed 5.7% in any given year. These limits on tuition shall apply to all seven campuses and one branch campus for the next two academic years (2013-14 and 2014-15) regardless of the outcome of any governance changes that may be implemented during the biennium.

House Bill 5008 includes General Fund appropriations to the Oregon University System (OUS) State Programs budget unit for the following purposes:

- \$1,200,000 to expand fermentation science programs at Oregon State University.
- \$250,000 one-time appropriation to Oregon State University for technical assistance to help shellfish hatchery larval production affected by ocean acidification and assist with the maintenance of OSU's Mollusca Brood Stock Program with the intent to produce larval strains more resilient to the adverse effects of ocean acidification.
- \$80,000 to increase the base funding for the Labor Education and Research Center at the University of Oregon.

The Subcommittee adopted the following budget note related to public university support of State Programs with non-state funding:

**Budget Note:**

It is the expectation of the Legislature that university support for State Programs housed within the Oregon University System be maintained or increased in the same manner as other university programs during the 2013-15 biennium.

The Subcommittee also approved a decrease of \$856,000 General Fund from the budget for the Oregon University System to reflect the shifting of various responsibilities in House Bill 3120 and Senate Bill 270 from the Chancellor's Office (CO) to the Higher Education Coordinating Commission (HECC). Both of these bills are related to post-secondary education governance. This reduction related to transfer of duties from CO to HECC rolls-up to a \$1,200,000 General Fund reduction in the 2015-17 biennium.

**HUMAN SERVICES**

**Oregon Health Authority**

The Subcommittee added \$1,360,000 General Fund to the Oregon Health Authority for the following purposes:

- \$200,000 General Fund for providing fresh Oregon-grown fruits, vegetables and cut herbs from farmers' markets and roadside stands to eligible low-income seniors under the Senior Farm Direct Nutrition Program. Another \$100,000 General Fund was added for the same purpose for eligible individuals through the Women, Infants and Children Program.
- \$260,000 General Fund to increase reimbursements for ambulance transport services.
- \$200,000 General Fund for the Oregon State Hospital to contract for legal services from the Marion County District Attorney, to address the issue of chronically violent patients at the hospital.
- \$700,000 General Fund for breast and cervical cancer screening services. Of this total, about \$400,000 is needed to backfill funding shortfalls in the first year of the biennium related to reductions in funding from the Komen Foundation, as well as reductions resulting from federal sequestration.

The transfer of \$100,000 General Fund from the CCare program to the Oregon Vasectomy Project was approved. This will supplement the project's \$10,000 Title X federal funds.

The Subcommittee approved additional rate increases for the Alcohol and Drug system in Addictions and Mental Health (AMH). A total of \$800,000 General Fund will be used to provide a 2.4% rate increase effective July 1, 2013, and another \$1.4 million General Fund will be used to increase the room and board rate for youth residential beds from \$60 per day to \$90 per day effective July 1, 2013. (The agency's regular budget bill, House Bill 5030, already increases those rates from \$30 per day to \$60 per day.) The funding for these changes comes from two sources: \$1.7 million from the "reinvested" dollars in the AMH budget, resulting from dollars freed up as more clients will have insurance beginning January 2014, and \$500,000 General Fund from the Intensive Treatment and Recovery Services (ITRS) program. With the Affordable Care Act expansion, many of the ITRS clients will have insurance, and less General Fund will be needed to maintain the program level.

TTRS is reduced an additional \$3.3 million General Fund, and this funding is placed in a special purpose appropriation in the Emergency Board, to be available for rate increases in the adult residential system for alcohol and drug treatment for the second year of the biennium. As documented in the budget report for House Bill 5030, the agency will do a study of both the youth and adult systems and report to the 2014 Legislature. Based on the findings of that study, some or all of this special purpose appropriation could be allocated at that time. The Legislature could also decide to reduce the youth rate based on the results of that study.

House Bill 5030, the budget bill for the Oregon Health Authority, eliminated all Other Funds Nonlimited authority for the Public Employees' Benefit Board and the Oregon Educators Benefit Board, and instead moved all expenditure limitation to Other Funds Limited. This bill reverses that, resulting in a decrease in Other Funds Limited of \$3.2 billion and an increase in Other Funds Nonlimited of the same amount.

The following budget notes related to the Oregon State Hospital and the Blue Mountain Recovery Center were approved:

**Budget Note:**

The Oregon Health Authority shall report to the interim Joint Committee on Ways and Means or the Emergency Board by December 2013 on recommendations for decreasing the use of overtime and improving patient and staff safety at the Oregon State Hospital.

In order to make recommendations, the Oregon State Hospital will form a work group that will include representation from some of the major classifications of employees, particularly those providing direct care of patients, such as psychologists, psychiatrists, registered nurses, mental health therapists, mental health therapy technicians, mental health security technicians, and managers.

The report should include the following:

- Data on overtime hours worked and costs over the last 12 to 18 months, as well as the reasons for the use of this overtime. Details on mandated overtime should be reported.
- Data on the numbers and types of assaults on patients and staff over the last 12 to 18 months, as well as the costs, both direct and indirect, associated with those assaults. The report should also contain information on the concentration of those assaults involving a small number of individuals.
- Recommendations for reducing overtime and reducing assaults, and the status of implementing those recommendations. The report should include, but not be limited to, recommendations related to the float (relief) pool, such as the appropriate mix of permanent full-time, permanent part-time, limited duration, and temporary positions. The report should also consider recommendations for working with the Marion County District Attorney to address issues related to chronically violent patients.

**Budget Note:**

The Oregon Health Authority shall report to the appropriate legislative committee in September and December on the planning for the transfer of patients from the Blue Mountain Recovery Center (BMRC) pending its closure on January 1, 2014. Additionally, the Oregon Health Authority shall convene a workgroup comprised of the appropriate representatives of the various stakeholder groups, to identify future options for BMRC staff and facilities. The workgroup will have the following charge:

- (1) To identify needed services for Eastern Oregon's most vulnerable people, including those with:
  - (a) acute and chronic mental illness who require special services to enable them to successfully function in society;

- (b) substance abuse and subsequent involvement with the criminal justice system; and
- (c) mental illness and additional complications arising from age-related conditions.

(2) To advise the legislature and the Oregon Health Authority on strategies to best retain the existing specialized mental health workforce in the region; and

(3) To advise the legislature and the Oregon Health Authority on the best utilization of the current facilities and identify additional capital improvements to provide the above-identified services.

#### Department of Human Services

The Subcommittee added \$5 million General Fund and \$9.7 million Federal Funds expenditure limitation (\$14.7 total funds) to the Aging and People with Disabilities budget for the following purposes:

- \$1,300,000 General Fund and \$2,900,000 Federal Funds limitation to advance the implementation date for home and community based care rate increases from October 1, 2013 to July 1, 2013. Rates have been flat since July 2008 and were increased as part of the Department's budget as approved in Senate Bill 5529.
- \$2,500,000 General Fund and \$5,600,000 Federal Funds limitation to partially restore the instrumental activities of daily living (IADL) reduction that occurred in January 2012. Using available funding, the Department will develop and implement a plan to restore hours to the maximum extent possible. The plan may include a phased-in restoration as the Department conducts eligibility re-assessments for consumers served in long term care programs.
- \$700,000 General Fund to augment \$1.6 million General Fund already approved to support projects (innovations and pilots) to develop new approaches to long term care services. The additional amount includes \$350,000 General Fund for a grant to the Neighborhood Housing and Care Program, which is implementing a model for serving people living with HIV/AIDS in their homes. The average age and acuity of these individuals is growing along with the baby boomer population.
- \$500,000 General Fund and \$1,200,000 Federal Funds limitation to help cover Homecare Worker compensation costs associated with nurse delegation duties.

The 2013-15 budget approved for the Department of Human Services (DHS) in Senate Bill 5529 continued some reductions in developmental disability program budgets for community programs and brokerages. These reductions left equity (parity) relative to state office costs at levels ranging from 85% to 95%, depending on the budget component (e.g., case management and brokerage options). After completion of the DHS budget in Senate Bill 5529, DHS discovered that, within the budgeted funding level for these programs and with some updated assumptions in the budget model, equity for both programs could be brought up to 94% across all components. The Subcommittee approved the Department's plan to realign the budgets for the programs and implement the revised parity level. DHS is currently developing workload-based models for both programs and plans to build those models into the agency's 2015-17 budget proposal.

The Subcommittee added \$1,000,000 Other Funds expenditure limitation for the Employment Related Day Care (ERDC) program to help cover child care provider rate increases while providing subsidies to as many employed parents as possible. This funding is currently available due to lower than expected 2011-13 utilization of federal Child Care Development Fund dollars by the Child Care Division; General Fund may be needed in future biennia to cover these expenditures.

### Long Term Care Ombudsman

The Subcommittee added \$585,488 General Fund and seven permanent positions (2.81 FTE) to support work under Senate Bill 626, which expands duties of the Long Term Care Ombudsman to advocate for residents of care facilities who have mental illness or developmental disabilities. There are about 7,600 persons living in 1,816 licensed adult foster homes and group homes in Oregon serving persons with developmental disabilities and mental illness.

To provide the subject matter expertise needed to develop and refine the expanded program, the agency would add one permanent full-time Program Analyst 4 position. Five full-time deputy ombudsman positions (Program Analyst 2 classification) would ultimately be needed to work with approximately 125 new volunteers. Consistent with an expected gradual ramp-up for the new program, four of these positions would be phased in over the last 12 months of the 2013-15 biennium, with the fifth position phased-in at the start of the 2015-17 biennium. A half-time volunteer recruiter position (Program Analyst 1) would also be required to develop and maintain volunteer ranks and an Administrative Specialist would help support the new program, staff, volunteers, and an expanded advisory committee.

In addition, to help the agency better serve its existing clients, the Subcommittee increased the agency's budget by \$200,000 General Fund, which covers salary and other costs associated with adding one full-time deputy ombudsman position (1.00 FTE). This position will supervise 25 to 30 additional volunteers, increasing facility coverage (visits) with an emphasis on adult foster homes.

## JUDICIAL BRANCH

### Judicial Department

The Subcommittee increased the General Fund appropriation for judicial compensation by \$634,980, to finance a second salary increase for judges during the 2013-15 biennium. Judicial salaries are established by statute. House Bill 2322 increases the salaries of judges by \$5,000 per year beginning January 1, 2014, and by an additional \$5,000 per year beginning January 1, 2015. The 2013-15 biennium cost of the House Bill 2322 salary increases totals \$2,539,916. House Bill 5016, the budget bill for the Judicial Department, includes \$1,934,859 General Fund to fund the first \$5,000 salary increase. The General Fund increase included in this bill provides the additional funds needed to pay the second \$5,000 salary increase for the six months that it will be in effect in the 2013-15 biennium.

An Other Funds expenditure limitation increase of \$335,000 was approved for operations, for costs of issuing Article XI-Q bonds to finance a \$4.4 million capital construction project to renovate the exterior of the Supreme Court Building, and to finance a \$15 million grant to support development of a new courthouse for the Multnomah County Circuit Court in Portland. The cost of issuing the bonds will be financed from the proceeds of the bonds.

The Subcommittee also established a \$1 Other Funds expenditure limitation for the Oregon Courthouse Capital Construction and Improvement Fund. This newly-established Fund will hold Article XI-Q bond proceeds and county matching funds, and will be used to fund the purchase, remodeling or construction of courthouses owned or operated by the State. Senate Bill 5506 authorizes \$15 million of Article XI-Q bond proceeds that would be deposited into this Fund. The Legislative Assembly or the Emergency Board must increase the \$1 expenditure limitation, before bond proceeds and county matching funds could be distributed to the county for a construction project.

The Subcommittee reduced the Other Funds expenditure limitation on expenditures of Article XI-Q bond proceeds for Oregon eCourt by \$190,767, to correct an error in House Bill 5016, the Judicial Department's budget bill.

#### Public Defense Services Commission

The Subcommittee increased the General Fund appropriation for Professional Services by \$2,409,367. This increase includes three components:

- General Fund is increased \$2,400,000 to reduce trial-level juvenile dependency caseloads and improve the quality of legal services in juvenile dependency and termination of parental rights cases. The approved funding level will support an approximate 4.5% average reduction in the caseloads of attorneys providing these services, however, the agency may choose to distribute available funds on a pilot project basis. The agency will make caseload reductions conditional upon agreement to implement established best practices, and will evaluate the impacts of the caseload reductions.
- General Fund is increased \$864,567 to increase compensation paid to public defender contractors, hourly-paid attorneys, and hourly-paid investigators. The funds provided by this action will be added to the \$2,135,433 General Fund appropriated to the Commission for this same purpose in House Bill 5041, to provide a total of \$3,000,000 for compensation increases. From the \$3,000,000 available, the agency is to allocate \$2,329,729 to reduce the average salary differential between public defender salaries and district attorney salaries, allocate \$218,141 to increase the compensation rates for hourly-paid attorneys, and allocate \$452,130 to increase the compensation rates for hourly-paid investigators.
- General Fund is reduced \$855,200 as a result of passage of Senate Bill 40, which reduces crimes for the unlawful manufacture and possession of marijuana and marijuana products. The fiscal impact of these actions will reduce costs to the Commission by this amount.

### LEGISLATIVE BRANCH

#### Legislative Administration Committee

The Legislative Administration Committee has increased expenditures related to the Capitol Master Plan project. The bill establishes an Other Funds limitation of \$615,000 for the cost of issuance of Article XI-Q bonds for the project. It also includes a General Fund appropriation of \$1,421,341 for the debt service on the bonds issued for the 2013-15 biennium. Expenditure limitation for the project costs are provided in SB 5507 (the capital construction bill).

#### Legislative Fiscal Officer

House Bill 5008 establishes an Other Funds account called the Legislative Fiscal Office Operating Fund.

### NATURAL RESOURCES

#### State Department of Agriculture

The bill adds \$34,060 General Fund to increase special payments to USDA-APHIS-Wildlife Services for predator control activities. \$65,940 General Fund was also added to the Department of Fish and Wildlife for the same purpose. With these increases, state-support in both

departments for predator control activities will be equalized at \$415,889 for the 2013-15 biennium. The Subcommittee added the following budget note related to this increase:

Budget Note:

The Department of Fish and Wildlife and the Department of Agriculture shall, using information provided by USDA-APHIS-Wildlife Services, report to the appropriate subcommittee of the Joint Committee on Ways and Means during the 2015 Regular Session on wildlife conflicts responded to by Wildlife Services agents by species, resource type, and methods used to address the conflict, summarized by county.

The Subcommittee reduced Lottery Funds by \$21,380 to reflect the ending of the County Fair Commission, for which the Department had received funding for minimal administrative support. The moneys will now instead be added to the Lottery Funds support for County Fair payments by the Department of Administrative Services.

Columbia River Gorge Commission

The budget for the Columbia River Gorge Commission was reduced by \$79,873 General Fund to match the lower appropriation made by the State of Washington for Columbia River Gorge Commission activities:

State Department of Energy

House Bill 5008 increases the Department's Other Funds expenditure limitation by \$9,876,190 for home energy efficiency programs that will further the Ten Year Energy Plan goal of meeting new electric energy load growth through energy efficiency and conservation. This expenditure limitation includes \$76,190 for cost of issuance associated with \$5 million in Lottery Bond proceeds, as well as \$4.8 million in unexpended public purpose charge single family weatherization funding transferred from the Housing and Community Services Department in House Bill 2322.

The bill clarifies the use of Lottery Funds by the Department of Energy, to be consistent with the agency's adopted budget.

Department of Environmental Quality

House Bill 5008 removes \$17,140,248 Other Funds expenditure limitation for debt service payments mistakenly added in Senate Bill 5520. This subsection of Senate Bill 5520, the budget bill for the Department of Environmental Quality, is not necessary because the agency was also provided nonlimited Other Funds authority to pay debt service costs during the 2013-15 biennium in the same bill. This adjustment will prevent authorized Other Fund debt service payments from being erroneously doubled counted in 2013-15.

Department of Land Conservation and Development

The Subcommittee approved \$116,000 General Fund to supplement grant funding for the Southern Oregon Regional Land Use Pilot Program. The bill also includes \$80,000 General Fund for a grant to the Columbia River Gorge Commission for continuation of work on urban planning issues inside the Oregon portion of the National Scenic Area in the Columbia River Gorge. In addition, a reduction of \$35,000 General Fund in the Planning Program was approved because rulemaking will not be required to implement provisions of House Bill 2202 to mining on land zoned for exclusive-farm use.

State Department of Fish and Wildlife

The Subcommittee added a one-time \$50,000 General Fund appropriation as state match for a study on the effects of cormorant predation on listed salmonids. The state support will be matched with \$150,000 Federal Funds to hire seasonal positions to conduct population surveys, conduct diet studies to help verify the extent of salmonid predations, and assist in on-going hazing efforts.

The bill also adds \$65,940 General Fund to increase special payments to USDA-APHIS-Wildlife Services for predator control activities. \$34,060 General Fund was also added to the Department of Agriculture for the same purpose. With these increases, state-support in both departments for predator control activities will be equalized at \$415,889 General Fund for the 2013-15 biennium. The Subcommittee added the following budget note for both agencies:

Budget Note:

The Department of Fish and Wildlife and the Department of Agriculture shall, using information provided by USDA-APHIS-Wildlife Services, report to the appropriate subcommittee of the Joint Committee on Ways and Means during the 2015 Regular Session on wildlife conflicts responded to by Wildlife Services agents by species, resource type, and methods used to address the conflict, summarized by county.

State Forestry Department

The Department has received a pre-award notice from the U.S. Department of Agriculture regarding the availability of \$3 million of federal legacy dollars to be applied to the Gilchrist Forest acquisition. Limitation in that amount is added for the 2013-15 biennium. The total amount includes \$600,000 for recently-available infill acreage.

To cover the expense of bond issuance for the Gilchrist Forest purchase and the East Lane construction, the Subcommittee increased Other Funds expenditure limitation by \$120,000.

The Department is directed to use up to \$200,000 of the Forest Revenue CSF account to supplement Policy Package 486, SB 5521 (2013), for the same purposes as Package 486. Package 486 provided \$250,000 Other Funds expenditure limitation to meet statutory requirements for forest research and monitoring on the Elliott State Forest.

The following budget note was approved for the State Forestry Department:

Budget Note:

Senate Bill 5521 (2013) provided \$2,885,000 Lottery Funds limitation to the Department of Forestry for the Governor's dry-side forest health collaboration effort for a new business model to improve federal forest project management and technical and scientific support. In administering the funding, the department is authorized to also consider a small grant program and a limited duration liaison position, from the \$2,885,000, at the department's discretion. The small grants are to be administered by the Oregon Watershed Enhancement Board using the Board's existing expenditure limitation. The position, if created, is to be the state's point of contact for the US Forest Service, congressional delegation, local forest collaborative groups, and the state Legislative Assembly.

The Department is directed to report to the Legislature in February 2014 on specific plans, expected outcomes, progress, and the amount of federal funding and support provided to the collaboration.

#### Parks and Recreation Department

Other Funds expenditure limitation is increased by \$5,000,000 for lottery bond proceeds designated to be passed through to a local recipient for the Willamette Falls project. In addition, the limitation is increased by \$69,882 for cost of issuance expenses. There is no debt service in the 2013-15 biennium as the bonds will not be sold until the spring of 2015. Debt service in 2015-17 is \$0.9 million Lottery Funds.

#### Department of State Lands

House Bill 5008 increases the Department's Other Funds expenditure limitation by \$307,360. This is for unspent limitation associated with the conversion of 960 open rangeland acres currently leased for livestock grazing. The acreage will be converted to about 620 acres of irrigated agriculture land. The expenditure limitation was authorized by the Emergency Board in May, 2012. Due diligence review and determination of wetlands, required before undertaking the conversion, has taken longer than expected. After the final wetlands determination report in July 2013, the agency can move ahead to complete the project.

The Subcommittee increased the Federal Funds expenditure limitation in anticipation of two Environmental Protection Agency grants to develop scientifically based tools for functions-based, watershed-scale approach to wetlands mitigation in Oregon. The Department expects final notification on the grants in September 2013. The total amount is \$135,000. The Department of Administrative Services (DAS) is requested to un-schedule the limitation until such time as State Lands notifies DAS and the Legislative Fiscal Office that the funds are awarded.

#### Water Resources Department

The Subcommittee approved \$10,242,513 Other Funds expenditure limitation from bond proceed resources for water supply projects including, but not limited to, statewide piping and lining open, rock or dirt-lined irrigation canal projects; implementation/completion of the Umatilla Basin Aquifer Recovery Project, repairing the Dam at Wallowa Lake and constructing a new reservoir in Juniper Canyon; the Willamette Basin Long-Term Water Allocation Study; the Deschutes Basin Study; and development of above and below ground water storage projects with partners in Oregon, Washington State, and Canada.

### **PUBLIC SAFETY**

#### Department of Corrections

If House Bill 3194 becomes law, the operational budget for the Department of Corrections (DOC), excluding Community Corrections, is reduced by \$19.7 million General Fund and 197 positions (65.31 FTE). This reduction eliminates most of the mandated caseload estimate included in House Bill 5005, and reflects a decrease in projected bed utilization of approximately 700 in 2013-15 from the April 2013 corrections forecast. Although the operational budget is decreased overall, the Department did receive \$168,302 General Fund and 0.79 FTE to support the transitional leave program requirements in House Bill 3194.

The Subcommittee made several modifications to DOC's Community Corrections budget. First, \$9 million General Fund was approved to enhance baseline funding for community corrections programs. Further, if House Bill 3194 becomes law, baseline funding is increased to total

\$215 million, or an additional \$8.09 million General Fund. At \$215 million, the Community Corrections baseline would be \$33 million, or 18%, above the 2011-13 legislatively approved budget. Also, conditional on passage of House Bill 3194, \$5 million General Fund was approved for jail support. DOC will distribute these dollars to counties based on each county's proportion of the baseline funding formula.

The following budget note was approved:

**Budget Note:**

As in the 2011-13 legislatively approved budget, the Department of Corrections is instructed to address the level of unspecified reductions in its budget without closure of existing facilities and without use of layoffs to reach the reduction goal. A report on what steps may be needed to reach reduction goals will be presented to the Joint Committee on Ways and Means during the February, 2014 legislative session.

**Criminal Justice Commission**

House Bill 3194 creates the Justice Reinvestment Account (Account) to support grants to counties for programs to reduce recidivism and decrease utilization of state prison capacity. However, the bill itself does not establish a funding level. The Subcommittee approved \$10 million General Fund for the Account with the understanding that an additional \$5 million would be approved during the February, 2014 legislative session if the legislative assembly receives a 2013-15 General Fund forecast that is higher than the close of session forecast. This approval was made with the understanding that the Governor's Office will also direct the Criminal Justice Commission (CJC) to allocate \$5 million in federal funds from the 2012 and 2013 Byrne/Justice Assistance Grants for similar grants to counties. In the 2015-17 biennium, the current service level is expected to total \$20 million General Fund for the Account.

The Subcommittee also approved \$190,000 General Fund and the phase-in of one Program Analyst 4 (0.88 FTE) to support grant administration and the Task Force on Public Safety as authorized in House Bill 3194.

The following budget note was approved:

**Budget Note:**

CJC is directed to administer the Justice Reinvestment Program and Specialty Courts Grant Programs during 2013-2015 using General, Other and Federal Funds. CJC will work with the Justice Reinvestment Grant Review Committee and the Criminal Justice Commission to distribute and allocate these different funds in an efficient and effective manner. CJC will report back on the results of this work during the February 2014 legislative session.

**Department of Justice**

The Subcommittee approved an increase in Other Funds (Criminal Fine Account) expenditure limitation by \$700,000 to support an increased allocation to Child Abuse Multidisciplinary Intervention (CAMI). With this adjustment, CAMI would receive in total General Fund and Criminal Fine Account allocations, \$10.7 million or 9.9% increase over the 2011-13 legislatively approved budget.

An increase of \$1.8 million General Fund was approved for the Oregon Domestic and Sexual Violence Services Fund (ODSVS). If House Bill 3194 becomes law, an additional \$2.2 million General Fund, for a total of \$4 million, is approved. These adjustments augment the \$4.4 million General Fund authorized in House Bill 5018.

This bill includes a reduction in the Other Funds expenditure limitation for the Department of Justice's Civil Enforcement Division of \$471,040. During consideration of House Bill 5018, this amount was shifted from the Non-limited budget category. Upon further review, restitution and refund payments from the Protection and Education Revolving Account can correctly be categorized as Non-limited.

The Subcommittee approved the first phase of funding to replace the Child Support Enforcement Automated System (CSEAS). This approval included \$1.6 million General Fund for debt service on XI-Q Bonds authorized in Senate Bill 5506, \$14.1 million Other Funds expenditure limitation, and \$27.4 million Federal Funds. In total, the CSEA project is estimated to cost \$109.4 million with federal funding supporting two-thirds of the project. The Subcommittee also approved the following budget note:

**Budget Note:**

The Department of Justice (DOJ) is directed to work with the Department of Administrative Services (DAS) in the development and implementation of the Child Support System Modernization project. DAS is to provide support to and collaborate with the DOJ in the information technology systems development lifecycle, procurement, quality assurance, and other support needed to successfully complete this project. DOJ and DAS are directed to report to the Legislative Fiscal Office at a minimum of every six months through the remainder of the biennium on the status of the project as well as provide copies of all Quality Assurance, Quality Control, and Independent Verification and Validation reports upon their receipt by the agency. DOJ is also to submit an update on the status of foundational project management documentation, including copies of completed documents, each accompanied by independent quality control review, to LFO by December 1, 2013.

The Subcommittee approved budget adjustments for an increase in the statutorily set salary for statewide elected officials as provided for in House Bill 2322. The statewide elected officials include the Governor, Secretary of State, State Treasurer, Attorney General, and the Commissioner of Labor and Industries. Each is to receive a salary increase of \$5,000 per year, beginning on January 1, 2014. The impact on the Department of Justice is an increase of \$9,174 Other Funds expenditure limitation, including other payroll expenses. Statewide elected officials last received a salary increase in July of 2009. Statutory Judgeships are also to receive a salary increase (see Judicial Branch program area narrative). The compensation for members of the Legislative Assembly remains unchanged.

The Subcommittee also authorized \$75,000 General Fund to support the Oregon Crime Victims Law Center. Further, the Defense of Criminal Conviction program was reduced by \$391,724 General Fund to reflect a smaller increase in mandated caseload.

**Oregon Military Department**

The Subcommittee appropriated \$275,000 of General Fund for the Oregon Local Disaster Assistance Loan and Grant Account under the Emergency Management program for possible loans or grants from the account. The Department will need to request Other Funds expenditure limitation from either the Legislature or the Emergency Board specific to a local disaster in order to expend funds from the Account.

The bill includes \$15,000 General Fund for the Oregon Youth Challenge program for the reimbursement of fuel costs of participating youths' parents or legal guardians who travel to the program to visit their children. The Oregon Youth Challenge program is to establish a reimbursement policy for such expenses and is to expend no more than the appropriation provided, unless federal matching funds are available for this purpose.

General Fund Debt Service of \$314,523 was approved to support repayment of Article XI-Q General Obligation bond approved in Senate Bill 5506 for the 2013-15 biennium (Sharff Hall - Portland and Roseburg Armory). The appropriation reflects a reduction of \$78,840 for General Fund Debt Service savings from previously issued bonds. The General Fund Debt Service for the 2015-17 biennium will total \$2.2 million and will include Debt Service costs for Sharff Hall, the Medford Armory, the Roseburg Armory, and the Baker City Readiness Center. The Subcommittee also approved \$237,345 Other Funds expenditure limitation for the cost of issuance for the four projects.

#### Oregon State Police

To address concerns for diminishing availability of public safety services in some Oregon counties, particularly in the areas of patrol and criminal investigations, the Subcommittee approved \$1.16 million General Fund and 10 trooper positions (2.50 FTE) within the Patrol Division, \$462,000 General Fund and four trooper positions (1.00 FTE) within the Criminal Division, \$1.47 million General Fund for forensic equipment and one Forensic Scientist (0.88 FTE), and \$300,000 General Fund to support contractual payments for medical examiner services in Southern Oregon.

#### Department of Public Safety Standards and Training

The Subcommittee approved \$1 million Other Funds (Criminal Fine Account) expenditure limitation and four Public Safety Training Specialist 2 positions (3.52 FTE) to support the Oregon Center for Policing Excellence.

#### Oregon Youth Authority

The General Fund appropriation for the East Multnomah County gang funding is increased by \$126,673 for extraordinary inflation associated with personnel costs. Total funding with this addition is \$1,833,428.

Because of savings in capital projects, Oregon Youth Authority is able to redirect unspent funds to debt service, eliminating the need for the same amount of General Fund. The Subcommittee approved establishing a new other Funds expenditure limitation for \$384,877 for debt service. The General Fund reduction is included in the omnibus adjustments.

### TRANSPORTATION

#### Department of Transportation

Senate Bill 665 proposed moving the Statewide Interoperability Coordinator (SWIC) position and support for the Statewide Interoperability Executive Council from the Department of Transportation to the Department of Administrative Services. The bill was not heard. The agencies are instructed to complete planning for the transfer and report to the February 2014 Legislature on status of the federal FirstNet grant funding and how the SWIC's salary and other expenses will be paid. Two positions that were eliminated from the Department of Transportation's Highway Maintenance unit budget in anticipation of Senate Bill 665's passage are restored. They are a Project Manager 3 and an Operations and Policy Analyst 4. Other Funds expenditure limitation is increased by \$391,871 in Personal Services to support the positions.

House Bill 3137 permits an individual to submit to the Department of Transportation a voluntary odometer reading for a vehicle over ten years old as part of transfer of any interest in the motor vehicle. The measure has a fiscal impact to the Driver and Motor Vehicles Division. If the bill becomes law, it is understood that the Department may proceed with implementation if the National Highway Traffic Safety Administration odometer fraud grant in the same amount, for which the Department applied in May, 2013, is awarded. If the grant is not awarded and the Department can find no other funding to implement the measure, the Department may request funding from the Legislature in February 2014.

The Subcommittee approved an increase in Other Funds expenditure limitation in the Transportation Program Development section of \$42,000,000 in lottery bond proceeds for ConnectOregon V. In addition, the limitation is increased by \$691,683 for cost of issuance expenses. There is no debt service in the 2013-15 biennium as the bonds will not be sold until the spring of 2015. Debt service in 2015-17 is \$7.6 million Lottery Funds. The following direction was provided:

**Budget Note:**

In order to ensure Connect Oregon Funds are used efficiently and effectively, the department shall take steps to ensure that projects are delivered on time and on budget. Actions shall include, but not be limited to, the withholding of five percent of the moneys awarded. Of the amount withheld under this section, the department shall release to the recipient:

- (a) Eighty percent when the recipient has completed the project.
- (b) Twenty percent when the recipient has submitted and the department has accepted the final performance measure report as established by agreement between the department and the recipient. The department may not pay and the recipient forfeits the amount withheld under this paragraph if the recipient does not submit a final performance measure report before the due date in a manner that is acceptable to the department as established by the agreement between the department and the recipient. Additionally, if the recipient does not submit the performance measure report before the due date, the recipient may not apply for another performance grant during the next application cycle.

Public Transit Other Funds expenditure limitation is increased by \$3,500,000 lottery bond proceeds for the Salem Keizer Transit Center. In addition, the Other Funds limitation is increased by \$62,986 for cost of issuance expenses. There is no debt service in the 2013-15 biennium as the bonds will not be sold until the spring of 2015. Debt service in 2015-17 is \$0.6 million Lottery Funds.

General Fund debt service in Senate Bill 5544 for the Lane Transit EmX project is eliminated, for a reduction of \$757,944. Lottery Funds debt service for this borrowing will begin in the 2015-17 biennium.

Other Funds expenditure limitation is increased in the Rail Division by \$10,000,000 for lottery bond proceeds for Coos Bay Rail. In addition, the limitation is increased by \$239,248 for cost of issuance expenses. There is no debt service in the 2013-15 biennium as the bonds will not be sold until the spring of 2015. Debt service in 2015-17 is \$1.8 million Lottery Funds.

## Adjustments to 2011-13 Budgets

### Emergency Board

House Bill 5008 disappropriates \$50,447,306 General Fund from the Emergency Board. This represents all remaining appropriation in the Emergency Board for the 2011-13 biennium.

### Oregon University System

The Subcommittee acted to align 2011-13 Other Funds expenditure limitations, adopted for the Oregon University System (OUS) before Senate Bill 242 (2011) was passed, with current budget reality, by removing a total of \$2,329,480,585 Other Fund limited and \$2,236,635,139 Other Funds non-limited authority approved by the Legislature during the 2011 Regular Session. With the passage of Senate Bill 242 (2011) the Oregon University System and its seven public universities were reorganized as non-state agencies. Part of this change involved removing OUS from being subject to Other Funds expenditure limitation by the Legislature.

### Oregon Youth Authority

House Bill 5008 includes a supplemental General Fund appropriation of \$200,000 for operations.

### Military Department

The Subcommittee disappropriated \$460,000 of General Fund for the Oregon Local Disaster Assistance Loan and Grant Account, which is in the Emergency Management program. There are currently no outstanding loan or grant requests for the account. The Subcommittee also disappropriated \$26,748 of General Fund Debt Service savings from the Capital Debt Service and Related Costs program.

HOUSE BILL 5008-A  
ATTACHMENT A: 2013-15 Agency 2% Holdback Adjustments

Agency Name	Appropriation Description	Bill Number	Section/ Sub	Fund	General Fund	Lottery Funds	Other Funds	Federal Funds
<b>ADMINISTRATION</b>								
ADVOCACY COMMISSIONS OFFICE	Operating Expenses	SB 5501	01	GF	(8,301)	-	-	-
DEPT OF ADMIN SERVICES	Chief Operating Office	HB 5002	01-01	GF	(5,511)	-	-	-
DEPT OF ADMIN SERVICES	Enterprise Asset Management	HB 5002	01-02	GF	(26,298)	-	-	-
DEPT OF ADMIN SERVICES	Oregon Public Broadcasting	HB 5002	01-03	GF	(10,000)	-	-	-
DEPT OF ADMIN SERVICES	Oregon Historical Society	HB 5002	01-04	GF	(15,000)	-	-	-
SECRETARY OF STATE	Administrative Services	SB 5539	01-01	GF	(39,053)	-	-	-
SECRETARY OF STATE	Elections Division	SB 5539	01-02	GF	(186,138)	-	-	-
DEPT OF REVENUE	Administration	SB 5538	01	GF	(1,121,210)	-	-	-
DEPT OF REVENUE	Property Tax	SB 5538	02	GF	(289,008)	-	-	-
DEPT OF REVENUE	Personal Tax and Compliance	SB 5538	03	GF	(1,328,832)	-	-	-
DEPT OF REVENUE	Business	SB 5538	04	GF	(446,852)	-	-	-
DEPT OF REVENUE	Elderly Rental Assistance and Nonprofit Housing	SB 5538	05	GF	(113,440)	-	-	-
EMPLOYMENT RELATIONS BOARD	Operating Expenses	HB 5010	01	GF	(38,817)	-	-	-
OFFICE OF THE GOVERNOR	Operating Expenses	SB 5523	01	GF	(205,081)	-	-	-
OFFICE OF THE GOVERNOR	Expenses for Duties	SB 5523	02	GF	(1,000)	-	-	-
OREGON STATE LIBRARY	Operating Expenses	HB 5022	01	GF	(32,951)	-	-	-
<b>CONSUMER AND BUSINESS SERVICES</b>								
BUREAU OF LABOR AND INDUSTRIES	Operating Expenses	HB 5020	01	GF	(234,674)	-	-	-
<b>ECONOMIC DEVELOPMENT</b>								
ECONOMIC AND COMMUNITY DEVELOP	Arts Commission	HB 5028	01-01	GF	(89,679)	-	-	-
ECONOMIC AND COMMUNITY DEVELOP	Business, Innovation and Trade	HB 5028	03-01	LF	-	(1,178,533)	-	-
ECONOMIC AND COMMUNITY DEVELOP	Business, Innovation and Trade - Seismic Rehab	SB 813	18e-01	LF	-	(3,208)	-	-
ECONOMIC AND COMMUNITY DEVELOP	Shared Services	HB 5028	03-02	LF	-	(136,228)	-	-
ECONOMIC AND COMMUNITY DEVELOP	Shared Services - Seismic Rehab	SB 813	18e-02	LF	-	(2,413)	-	-
ECONOMIC AND COMMUNITY DEVELOP	Oregon Film & Video Office	HB 5028	03-03	LF	-	(23,072)	-	-
ECONOMIC AND COMMUNITY DEVELOP	Oregon Growth Board	HB 2328	14	LF	-	(2,000)	-	-
ECONOMIC AND COMMUNITY DEVELOP	Oregon Industrial Site Readiness Program	SB 246	08	LF	-	(3,585)	-	-
ECONOMIC AND COMMUNITY DEVELOP	Beginning and Expanding Farmer Loan Program	HB 2700	07	LF	-	(4,552)	-	-
DEPT OF HOUSING/COMMUNITY SVCS	Operating Expenses	HB 6015	01	GF	(169,304)	-	-	-
DEPT OF VETERANS AFFAIRS	Services Provided by ODVA	HB 5047	01-01	GF	(82,088)	-	-	-
DEPT OF VETERANS AFFAIRS	County Payments	HB 5047	01-02	GF	(91,535)	-	-	-
DEPT OF VETERANS AFFAIRS	Vet's Services/Organizations Payments	HB 5047	01-03	GF	(2,212)	-	-	-
<b>EDUCATION</b>								
DEPT OF EDUCATION	Operations	SB 5518	01-01	GF	(909,397)	-	-	-
DEPT OF EDUCATION	Oregon School for the Deaf	SB 5518	01-02	GF	(222,340)	-	-	-
DEPT OF EDUCATION	Early Intervention services and early childhood special education programs	SB 5518	02-01	GF	(2,720,844)	-	-	-
DEPT OF EDUCATION	Other special education programs	SB 5518	02-02	GF	(857,426)	-	-	-
DEPT OF EDUCATION	Blind and Visually Impaired Student Fund	SB 5518	02-03	GF	(19,789)	-	-	-
DEPT OF EDUCATION	Breakfast and summer food programs	SB 5518	02-04	GF	(46,376)	-	-	-
DEPT OF EDUCATION	Strategic Investments	SB 5518	02-05	GF	(436,976)	-	-	-

Agency Name	Appropriation Description	Bill Number	Section/ Sub	Fund	General Fund	Lottery Funds	Other Funds	Federal Funds
DEPT OF EDUCATION	Other grant-in-aid programs	SB 5518	02-06	GF	(80,058)	-	-	-
DEPT OF EDUCATION	Oregon prekindergarten program	SB 5518	02-07	GF	(2,548,488)	-	-	-
DEPT OF EDUCATION	Other early learning programs	SB 5518	02-08	GF	(678,810)	-	-	-
DEPT OF EDUCATION	Youth development programs	SB 5518	02-09	GF	(114,882)	-	-	-
OREGON EDUCATION INVESTMENT BRD	Operating Expenses	SB 5548	01	GF	(123,176)	-	-	-
STUDENT ASSISTANCE COMMISSION	Oregon Opportunity Grants	HB 5032	01-01	GF	(2,269,536)	-	-	-
STUDENT ASSISTANCE COMMISSION	OSAC operations	HB 5032	01-02	GF	(68,076)	-	-	-
STUDENT ASSISTANCE COMMISSION	Other payments to Individuals and Institutions	HB 5032	01-03	GF	(28,985)	-	-	-
COMMUNITY COLLEGES DEPARTMENT	Operations	HB 5018	01-01	GF	(275,715)	-	-	-
COMMUNITY COLLEGES DEPARTMENT	Skills centers	HB 5018	01-03	GF	(12,000)	-	-	-
HIGHER EDUCATION COORD. COMM.	Operations	HB 5033	01	GF	(46,857)	-	-	-
<b>HUMAN SERVICES</b>								
LONG TERM CARE OMBUDSMAN	Operating Expenses	HB 5024	01	GF	(38,554)	-	-	-
COMMISSION FOR THE BLIND	Operating Expenses	HB 5003	01	GF	(31,287)	-	-	-
PSYCHIATRIC REVIEW BOARD	Operating Expenses	HB 5040	01	GF	(45,958)	-	-	-
DEPT OF HUMAN SERVICES	Central Services, Statewide Assessments & Enterprise-wide Costs	SB 5529	01-01	GF	(3,518,994)	-	-	-
DEPT OF HUMAN SERVICES	Child Welfare, Self Sufficiency, and Vocational Rehabilitation Services	SB 5529	01-02	GF	(16,897,631)	-	-	-
DEPT OF HUMAN SERVICES	Aging and People with Disabilities and Developmental Disabilities Programs	SB 5529	01-03	GF	(25,049,878)	-	-	-
OREGON HEALTH AUTHORITY	Programs	HB 5030	01-01	GF	(35,974,198)	-	-	-
OREGON HEALTH AUTHORITY	Central Services, Statewide Assessments and Enterprise-wide Costs	HB 5030	01-02	GF	(1,834,762)	-	-	-
<b>JUDICIAL BRANCH</b>								
JUDICIAL FIT OR DISABILITY COM	Administration	HB 5017	01-01	GF	(3,849)	-	-	-
JUDICIAL FIT OR DISABILITY COM	Extraordinary expenses	HB 5017	01-02	GF	(206)	-	-	-
JUDICIAL DEPARTMENT	Operations	HB 5016	01-02	GF	(5,485,535)	-	-	-
JUDICIAL DEPARTMENT	Mandated Payments	HB 5016	01-03	GF	(286,940)	-	-	-
JUDICIAL DEPARTMENT	Electronic Court	HB 5016	01-04	GF	(37,415)	-	-	-
JUDICIAL DEPARTMENT	Third-party Debt Collections	HB 5016	01-06	GF	(239,201)	-	-	-
JUDICIAL DEPARTMENT	Oregon Law Commission	HB 5016	05	GF	(4,492)	-	-	-
JUDICIAL DEPARTMENT	Council on Court Procedures	HB 5016	06	GF	(1,040)	-	-	-
JUDICIAL DEPARTMENT	Conciliation & mediation services in circuit courts	HB 5016	07-01	GF	(144,248)	-	-	-
JUDICIAL DEPARTMENT	Operating law libraries or providing law library services	HB 5016	08-01	GF	(144,248)	-	-	-
PUBLIC DEFENSE SERVICES	Appellate Division	HB 5041	01-01	GF	(291,347)	-	-	-
PUBLIC DEFENSE SERVICES	Professional Services	HB 5041	01-02	GF	(4,617,158)	-	-	-
PUBLIC DEFENSE SERVICES	Contract and Business Services Division	HB 5041	01-03	GF	(65,418)	-	-	-
<b>LEGISLATIVE BRANCH</b>								
LEGISLATIVE ADMIN COMMITTEE	General program	HB 5021	01-01	GF	(533,835)	-	-	-
LEGISLATIVE ASSEMBLY	Biennial General Fund	HB 5021	04	GF	(266,452)	-	-	-
LEGISLATIVE ASSEMBLY	77th Leg Assembly	HB 5021	05-01	GF	(338,307)	-	-	-
LEGISLATIVE ASSEMBLY	78th Leg Assembly	HB 5021	05-02	GF	(176,899)	-	-	-
LEGISLATIVE COUNSEL COMMITTEE	Operating Expenses	HB 5021	08	GF	(200,172)	-	-	-

HOUSE BILL 5008-A  
ATTACHMENT A: 2013-15 Agency 2% Holdback Adjustments

Agency Name	Appropriation Description	Bill Number	Section/ Sub	Fund	General Fund	Lottery Funds	Other Funds	Federal Funds
LEGISLATIVE FISCAL OFFICER	Operating Expenses	HB 5021	11-01	GF	(73,889)	-	-	-
LEGISLATIVE REVENUE OFFICE	Operating Expenses	HB 5021	12	GF	(51,398)	-	-	-
INDIAN SERVICES COMMISSION	Operating Expenses	HB 5021	13	GF	(9,186)	-	-	-
<b>NATURAL RESOURCES</b>								
DEPT OF GEOLOGY AND INDUSTRIES	General Fund	HB 5014	01	GF	(51,519)	-	-	-
DEPT OF PARKS AND RECREATION	General Fund	HB 5034	01	GF	(20,900)	-	-	-
LAND USE APPEALS BOARD	General Fund	SB 5531	01	GF	(30,950)	-	-	-
DEPT OF WATER RESOURCES	Water resources program	SB 5547	01	GF	(540,096)	-	-	-
DEPT OF AGRICULTURE	Administrative and Support Services	SB 5502	01-01	GF	(33,824)	-	-	-
DEPT OF AGRICULTURE	Food Safety	SB 5502	01-02	GF	(130,436)	-	-	-
DEPT OF AGRICULTURE	Natural Resources	SB 5502	01-03	GF	(140,392)	-	-	-
DEPT OF AGRICULTURE	Agricultural Development	SB 5502	01-04	GF	(79,760)	-	-	-
DEPT OF ENVIRONMENTAL QUALITY	Air quality	SB 5520	01-01	GF	(114,865)	-	-	-
DEPT OF ENVIRONMENTAL QUALITY	Water quality	SB 5520	01-02	GF	(392,845)	-	-	-
DEPT OF ENVIRONMENTAL QUALITY	Land quality	SB 5520	01-03	GF	(15,194)	-	-	-
DEPT OF FISH AND WILDLIFE	Fish Division	HB 5013	01-01	GF	(252,570)	-	-	-
DEPT OF FISH AND WILDLIFE	Wildlife Division	HB 5013	01-02	GF	(9,787)	-	-	-
DEPT OF FISH AND WILDLIFE	Administrative Services Division	HB 5013	01-03	GF	(29,412)	-	-	-
DEPT OF FISH AND WILDLIFE	Capital Improvement	HB 5013	01-05	GF	(2,912)	-	-	-
DEPT OF FORESTRY	Agency administration	SB 5521	01-01	GF	(4,000)	-	-	-
DEPT OF FORESTRY	Fire protection	SB 5521	01-02	GF	(771,994)	-	-	-
DEPT OF FORESTRY	Private forests	SB 5521	01-03	GF	(286,486)	-	-	-
DEPT OF LAND CONSERVATION/DEVELOPMENT	Planning program	SB 5530	01-01	GF	(211,884)	-	-	-
DEPT OF LAND CONSERVATION/DEVELOPMENT	Grant Programs	SB 5530	01-02	GF	(24,653)	-	-	-
COLUMBIA RIVER GORGE COMMISSION	Operating Expenses	SB 5511	01	GF	(17,820)	-	-	-
<b>PUBLIC SAFETY</b>								
BOARD OF PAROLE/POST PRISON	General Fund	HB 5035	01	GF	(79,300)	-	-	-
OREGON STATE POLICE	Patrol services, criminal investigations and gaming enforcement	HB 5038	01-01	GF	(2,965,500)	-	-	-
OREGON STATE POLICE	Fish and wildlife enforcement	HB 5038	01-02	GF	(57,000)	-	-	-
OREGON STATE POLICE	Forensic services and State Medical Examiner	HB 5038	01-03	GF	(742,545)	-	-	-
OREGON STATE POLICE	Administrative Services, Information management and Office of the State Fire Marshal	HB 5038	01-04	GF	(928,850)	-	-	-
DEPT OF CORRECTIONS	Operations and health services	HB 5005	01-01	GF	(17,849,890)	-	-	-
DEPT OF CORRECTIONS	Administration, general services and human resources	HB 5005	01-02	GF	(2,570,120)	-	-	-
DEPT OF CORRECTIONS	Offender management and rehabilitation	HB 5005	01-03	GF	(1,281,735)	-	-	-
DEPT OF CORRECTIONS	Community corrections	HB 5005	01-04	GF	(4,342,090)	-	-	-
DEPT OF CORRECTIONS	Capital Improvements	HB 5005	01-05	GF	(53,975)	-	-	-
CRIMINAL JUSTICE COMMISSION	General Fund	HB 5007	01	GF	(277,465)	-	-	-
DISTRICT ATTORNEYS/DEPUTIES	Department of Justice for District Attorneys	SB 5517	01	GF	(209,180)	-	-	-
DEPT OF JUSTICE	Office of AG & administration	HB 5018	01-01	GF	(6,000)	-	-	-
DEPT OF JUSTICE	Civil enforcement	HB 5018	01-02	GF	(77,855)	-	-	-
DEPT OF JUSTICE	Criminal Justice	HB 5018	01-03	GF	(168,930)	-	-	-
DEPT OF JUSTICE	Crime victims' services	HB 5018	01-04	GF	(114,900)	-	-	-
DEPT OF JUSTICE	Defense of criminal conviction	HB 5018	01-05	GF	(379,270)	-	-	-

HOUSE BILL 5008-A  
ATTACHMENT A: 2018-19 Agency 2% Holdback Adjustments

Agency Name	Appropriation Description	Bill Number	Section/ Sub	Fund	General Fund	Lottery Funds	Other Funds	Federal Funds
DEPT OF JUSTICE	Child Support Division	HB 5018	01-06	GF	(465,565)	-	-	-
DEPT OF MILITARY	Administration	SB 5534	01-01	GF	(88,729)	-	-	-
DEPT OF MILITARY	Operations	SB 5534	01-02	GF	(127,396)	-	-	-
DEPT OF MILITARY	Emergency Management	SB 5534	01-03	GF	(37,788)	-	-	-
DEPT OF MILITARY	Community Support	SB 5534	01-04	GF	(4,114)	-	-	-
OREGON YOUTH AUTHORITY	Operations	HB 5050	01-01	GF	(5,017,373)	-	-	-
OREGON YOUTH AUTHORITY	Juvenile crime prevention/diversion	HB 5050	01-02	GF	(351,862)	-	-	-
OREGON YOUTH AUTHORITY	East Multnomah County gang funding	HB 5050	01-03	GF	(34,135)	-	-	-
OREGON YOUTH AUTHORITY	Multnomah County Gang Services	HB 5050	01-04	GF	(67,542)	-	-	-
OREGON YOUTH AUTHORITY	Capital Improvements	HB 5050	01-06	GF	(14,763)	-	-	-
TRANSPORTATION								
OREGON DEPT OF TRANSPORTATION	PTD: Elderly & People w/Disabilities Transportation Pgm	SB 5544	02	GF	(40,000)	-	-	-
TOTAL					(164,895,175)	(1,353,591)	-	-

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Legislative Fiscal Officer

Daron Hill  
Deputy Legislative Fiscal Officer

## Summary of Emergency Board Action

May 2014

The Legislative Emergency Board met on May 30, 2014 and considered an agenda of 52 items. The agenda included two requests for allocations from the general purpose appropriation made to the Emergency Board; one of which was approved. There were also six agency requests on the agenda for allocations from special purpose appropriations made to the Emergency Board, totaling \$13.7 million, \$10.6 million of which were allocated. Additional details on these allocations are described below. After the Emergency Board actions, the unallocated, unreserved balance of the general purpose Emergency Fund is \$26.1 million with a \$36.3 million balance in special purpose appropriations.

The agenda included 17 items that requested additional 2013-15 biennium authority to spend Lottery Funds, Other Funds, and Federal Funds (including two adjusting 2011-13 capital construction expenditure authority). The Emergency Board approved expenditure limitation increases of approximately \$44.4 million Other Funds (including \$38.1 million for the Department of Administrative Services to make payments to counties under the Strategic Investment Program) and \$7.7 million Federal Funds. The Emergency Board also authorized the establishment of three permanent positions (1.25 FTE), six limited duration positions (2.71 FTE), and an increase of 19.63 FTE to existing positions.

The agenda also included 14 agency reports which the Emergency Board acknowledged receiving (three of which were on consent – from the Departments of Human Services, Transportation, and Administrative Services). The Emergency Board heard 19 requests for the submission of federal grant applications (eleven of which were on consent – from the Oregon Health Authority, Criminal Justice Commission, and Departments of Justice, Parks and Recreation, Agriculture, and Transportation). Two of the grant application requests included approvals of associated expenditure limitation increases.

The following is a summary of significant Emergency Board actions taken at the May 2014 meeting:

### Education

- Allocated \$700,000 to the Higher Education Coordinating Commission and \$2,299,999 to the Department of Administrative Services for the four Technical and Regional Universities from a special purpose appropriation made to the Emergency Board for costs associated with changes in the higher education system governance.
- Acknowledged receipt of a report by the Oregon Education Investment Board on the status of the P-20 Education State Longitudinal Data System project.
- Approved the submission of two five-year federal grant applications by the Department of

Education to the U.S. Department of Health and Human Services in the amount of \$9.75 million and to the U.S. Department of Education for up to \$3.75 million to address mental health issues in schools.

### Human Services

- Allocated \$390,000 to the Oregon Health Authority from a special purpose appropriation made to the Emergency Board for senior services to cover senior mental health services and planning costs; the agency was also directed to return to the Emergency Board with a more detailed program plan.

- Allocated \$500,000 to the Department of Human Services from a special purpose appropriation made to the Emergency Board for senior services to cover adult abuse data system planning costs and directed the agency to report back to the Emergency Board on planning progress.
- Allocated \$3,000,000 to the Department of Human Services from a special purpose appropriation made to the Emergency Board for senior services to cover costs of a pilot project expanding Oregon Project Independence services to people with disabilities.
- Allocated \$2,016,628 to the Department of Human Services from a special purpose appropriation made to the Emergency Board for senior services to restore federal funding lost due to sequestration.
- Acknowledged receipt of a report from the Department of Human Services and the Department of Education on policy recommendations on how best to modify the Employment Related Day Care program to provide child care subsidies to working parents enrolled in post-secondary higher education.
- Approved, retroactively, the submission of a federal grant application by the Department of Human Services to the U.S. Department of Agriculture in the amount of up to \$750,308 to expand employment services to certain Supplemental Nutrition Assistance Program participants.
- Acknowledged receipt of a report by the Department of Human Services on caregiver training and the Quality Care Fund.
- Acknowledged receipt of a report by the Oregon Health Authority on mental health housing investments.

#### Public Safety and Judicial Branch

- Deferred a request for an allocation from the general purpose Emergency Fund by the Criminal Justice Commission of \$142,000 to fund a vacant position until later in the biennium, and approved increases in the Other Funds expenditure limitation of \$212,000 and the Federal Funds expenditure limitation of \$1,107,000 for Specialty Court grants.
- Acknowledged receipt of a report by the Judicial Department on compensation plan changes for the agency resulting from a classification study that reviewed 29 existing job classifications covering 151 positions.

- Acknowledged receipt of a report by the Military Department on Next Generation 9-1-1 and directed the agency to report back to the Emergency Board on the status of the project.

#### Natural Resources

- Increased the Other Funds expenditure limitation of the Department of State Lands by \$223,145 for fire suppression and recovery costs incurred in 2013.
- Increased the Other Funds expenditure limitation of the Department of State Lands by \$750,000 for remodeling the State Lands Building for consolidation of agency staff.
- Increased the Other Funds expenditure limitation of the Department of State Lands by \$235,000 for capital improvements to enhance Common School Fund lands revenue for two Harney County projects related to conversion of grazing land to agricultural land, with the understanding that \$195,000 of the limitation increase will be uncheduled until a water right is obtained.
- Approved the submission of a federal grant application by the Parks and Recreation Department to the U.S. Fish and Wildlife Service in the amount of \$970,000 to acquire 357 acres of coastal property in the Sand Lake area of Tillamook County.
- Approved, retroactively, the submission of three federal grant applications by the Oregon Watershed Enhancement Board to the U.S. Fish and Wildlife Service in the combined amount of \$3,000,000 for acquisition and restoration of coastal wetlands (China Camp Creek, Scholfield Creek, and Kilchis River).
- Approved, retroactively, the submission of a federal grant application by the Department of Fish and Wildlife to the U.S. Fish and Wildlife Service in the amount of \$1,000,000 for acquisition of 10,000 acres near the Lower Deschutes Wildlife Area to provide enhanced public access to hunting, fishing, and wildlife viewing.

#### Economic and Community Development

- Allocated \$98,700 from the general purpose Emergency Fund to the Department of Veterans' Affairs and authorized the establishment of one limited duration position to facilitate timely training and accreditation of County Veteran Service Officers.

- Approved, retroactively, the submission of a federal grant application by the Department of Housing and Community Services to the U.S. Department of Housing and Urban Development in the amount of \$2,335,000 for project-based rental assistance to make 80 units of affordable housing available to extremely low-income Oregonians with mental illness.
- Approved, retroactively, the submission of a federal grant application by the Oregon Business Development Department to the U.S. Small Business Administration in the amount of \$300,000 for funds available under the State Trade and Export Promotion program and increased the Federal Funds expenditure limitation by \$210,000, with the understanding the limitation increase will be unscheduled until the grant is received.

#### Transportation

- Established a \$278,841 Other Funds Capital Construction expenditure limitation and a \$1,590,307 Federal Funds Capital Construction expenditure limitation for the Department of Transportation to renovate the Salem baggage depot located adjacent to the Amtrak passenger rail station; the new limitations will expire at the end of the 2013-15 biennium.
- Increased the 2011-13 Other Funds Capital Construction expenditure limitation for the Department of Transportation by \$332,391 to complete the Bend Driver and Motor Vehicle Division field office project.
- Approved the submission of a federal grant application by the Department of Aviation to the Federal Aviation Administration in the amount of \$2,385,000, increased the Other Funds Capital Construction expenditure limitation by \$265,000, and increased the Federal Funds Capital Construction expenditure limitation by \$2,385,000 for improvements at the Cottage Grove State Airport.
- Increased the 2011-13 Other Funds Capital Construction expenditure limitation for the Department of Aviation by \$204,454 to cover unbudgeted administrative, legal, engineering, and well drilling expenses at the Aurora State Airport.

#### Consumer and Business Services

- Increased the Other Funds expenditure limitation for the Department of Consumer and Business

Services by \$402,411, authorized the reclassification of two existing permanent positions, and authorized the establishment of five limited duration positions (2.21 FTE) to support increases in workload driven by changes in the health insurance market and in construction inspection and permitting services.

- Acknowledged receipt of a report by the Construction Contractors Board on agency operations and directed the agency to report back to the Emergency Board in September.

#### Administration

- Acknowledged receipt of a report by the Secretary of State on costs associated with a data breach of the agency's web applications.
- Increased the Other Funds expenditure limitation of the Treasurer of State by \$580,732 and authorized the establishment of two permanent full-time positions (0.83 FTE) for the creation of an Information Security Management program within the agency.
- Increased the Other Funds expenditure limitation of the Treasurer of State by \$111,967 and authorized the establishment of one permanent full-time position (0.42 FTE) to support the Oregon 529 College Savings Network program.
- Increased the Other Funds expenditure limitation for the Department of Administrative Services by \$38,110,951 for distributions to counties of funds from the Shared Services Fund related to the Strategic Investment Program; \$37.8 million of the amount is to be provided to Washington County.
- Increased the Other Funds expenditure limitation for the Government Ethics Commission by \$133,560 for costs associated with development of an electronic reporting system for statements of economic interest.
- Acknowledged receipt of a report by the Governor's Office on positions loaned from other agencies, funded with resources from other agencies, or currently vacant.
- Allocated \$1,684,947 from a special purpose appropriation made to the Emergency Board for the Oregon State Library, increased the Other Funds expenditure limitation by \$264,471 for endowment and donation funds and by \$2,857,191 for state agency assessments, increased the Federal Funds expenditure limitation by \$2,409,329, and authorized an

increase of 19.63 FTE for existing positions for second fiscal year operational costs of the agency.

- Acknowledged receipt of a report from the Department of Revenue on the Core System Replacement project and directed the agency to report back to the Emergency Board in September

on its readiness to proceed with implementation of Phase I of the project.

- Acknowledged receipt of a report by the Department of Administrative Services on uniform rent rates and approved the rates for the 2015-17 biennium.

Emergency Fund Balance Summary		
	Agency Requests	Full Board Action
<b>General Purpose Emergency Fund</b>		
Appropriation (after 2014 Session adjustments)	30,000,000	30,000,000
Allocations to date	0	0
<b>Unallocated Balance</b>	<b>30,000,000</b>	<b>30,000,000</b>
Reservations (within General Purpose)	3,850,000	3,850,000
Reservations allocated to date	0	0
<b>Unallocated Reservations</b>	<b>3,850,000</b>	<b>3,850,000</b>
<b>General Purpose Unallocated/Unreserved Balance</b>	<b>26,150,000</b>	<b>26,150,000</b>
# <i>May 2014 Requests - General Purpose</i>		
25 Criminal Justice Commission - Restore funding for Economist position	(142,000)	0
28 Department of Veterans' Affairs - Funding for position to assist training OVSOs	(98,700)	(98,700)
<b>Total Requests - General Purpose</b>	<b>(240,700)</b>	<b>(98,700)</b>
<b>General Purpose Unallocated/Unreserved Balance after 5/2014</b>	<b>25,909,300</b>	<b>26,051,300</b>
<b>Special Purpose Appropriations - Agency Specific (after 2014 Session actions)</b>		
Allocations/Transfers to Date	0	0
<b>Unallocated Balance</b>	<b>46,906,819</b>	<b>46,906,819</b>
# <i>May 2014 Requests - Special Purpose Appropriations - Agency Specific</i>		
8 Higher Education Coordinating Commission - Costs related to changes in governance of universities	(2,999,999)	(2,999,999)
10 Oregon Health Authority - Senior mental health specialists	(3,500,000)	(990,000)
20 Department of Human Services - Adult abuse prevention technology project	(500,000)	(500,000)
21 Department of Human Services - Oregon Project Independence pilot for people with disabilities	(3,000,000)	(3,000,000)
22 Department of Human Services - Older Americans Act backfill due to sequestration cuts	(2,016,628)	(2,016,628)
46 Oregon State Library - Second year operational costs	(1,702,192)	(1,684,947)
<b>Total Requests - Special Purpose - Agency Specific</b>	<b>(13,718,819)</b>	<b>(10,591,574)</b>
<b>Special Purpose Agency Specific Unallocated Balance after 5/2014</b>	<b>33,188,000</b>	<b>36,315,245</b>

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Emergency Board materials for the May 2014 meeting are available at <https://olis.leg.state.or.us/liz/201311/Committees/EB/2014-05-30-08-30/Agenda>

This summary is available on the Legislative Fiscal Office website at [www.oregonlegislature.gov/lfo](http://www.oregonlegislature.gov/lfo)

Enrolled  
Senate Bill 5548

Printed pursuant to Senate Interim Rule 213.28 by order of the President of the Senate in conformance with pre-session filing rules, indicating neither advocacy nor opposition on the part of the President (at the request of Oregon Department of Administrative Services)

CHAPTER .....

AN ACT

Relating to state financial administration; appropriating money; and declaring an emergency.

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

SECTION 1. There is appropriated to the Oregon Education Investment Board, for the biennium beginning July 1, 2013, out of the General Fund, the amount of \$6,158,784.

SECTION 2. This 2013 Act being necessary for the immediate preservation of the public peace, health and safety, an emergency is declared to exist, and this 2013 Act takes effect July 1, 2013.

Passed by Senate June 24, 2013

.....  
Robert Taylor, Secretary of Senate

.....  
Peter Courtney, President of Senate

Passed by House June 26, 2013

.....  
Tina Kotek, Speaker of House

Received by Governor:

.....M....., 2013

Approved:

.....M....., 2013

.....  
John Kitzhaber, Governor

Filed in Office of Secretary of State:

.....M....., 2013

.....  
Kate Brown, Secretary of State

# BUDGET NARRATIVE

## Oregon Education Investment Board

### Agency Summary

Senate Bill 909 (2011) created the Oregon Education Investment Board (OEIB), a 13-member board chaired by the Governor, to ensure that all students in the state reach the education outcomes established for the state. Senate Bill 253 (2011) defined those outcomes to include the “40/40/20” goals for high school and college completion by 2025. Passage of this bill signaled the state’s intention to develop one of the best-educated citizenries in the world with the goal that by 2025, 100 percent of Oregon students will have earned an education degree that represents attainment of a quality education. Specifically, the state will achieve the following for Oregonians in 2025: 40 percent of adult Oregonians will have earned a bachelor’s degree or higher; 40 percent of adult Oregonians will have earned an associate’s degree or postsecondary credential as their highest level of education attainment; and 20 percent of all adult Oregonians will have earned at least a high school diploma, an extended or modified high school diploma, or the equivalent of a high school diploma as their highest level of education attainment. These goals must be achieved equitably, with Oregon’s diversity equally well-represented in each stage.

SB 909 charges the OEIB with (1) creating a seamless system of education, including early learning programs, K-12 and post-secondary; (2) developing a statewide longitudinal database in order to measure progress toward outcomes; and (3) recommending strategic investments “targeted to achieve the education outcomes established for the state.” Based on these statutory charges, the OEIB adopted a strategic plan in 2013, aimed at ensuring the state reaches the 40-40-20 Goal. The OEIB strategic plan is built on three key strategies:

- Strategy 1: Create a coordinated, student-centered education system, from birth through college and career readiness**
- Strategy 2: Focus state investment on achieving key student outcomes**
- Strategy 3: Build statewide support systems**

The three strategies are overlapping, driven by student learning outcomes, and aimed at transforming – rather than simply adjusting – the state’s education system. The strategies represent, for the student, a promise of educational excellence at all levels; for the educator, an invitation to lead and commitment to improving student achievement; for the taxpayer, a return on investment; and to parents, community leaders, employers, policymakers, and educational organizations, a new partnership to strengthen education for every student across Oregon.

Agency Request

Governor's Budget

Legislatively Adopted

Budget Page \_\_\_\_\_

## BUDGET NARRATIVE

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In 2012, the Legislature approved the establishment of achievement compacts between OEIB and each school district, ESD, community college and public university in the state. A primary purpose of the achievement compacts is to focus all parties on key outcomes, and memorialize a shared responsibility between and among the state, educational institutions and communities to achieve those outcomes. Through the achievement compacts, institutions set goals around critical educational outcomes, chosen because research and evidence have shown them to be highly predictive of student success. The outcomes adopted by the OEIB include:

- More children entering Kindergarten ready to learn
- More 3<sup>rd</sup> graders reading at or above grade level
- Fewer 6<sup>th</sup> graders who are chronically absent
- More 9<sup>th</sup> graders finishing on track with credits and strong attendance records
- Increased numbers of students getting college credit in high school
- Increased high school completion rates and college enrollment rates
- Increased certificate & degree attainment
- Closing achievement gaps that exist on all outcomes for underserved students (students of color, economically disadvantaged students, students receiving special education services, and non-native English speakers)

The achievement compacts represent a shared commitment by the State and each education entity to achieve ambitious, but attainable interim steps in the trajectory towards the 40/40/20 goals. The compacts expect each education entity to adopt transformational practices, policies, and budgets. To aid this effort, the State must (1) build a learning continuum, rather than a collection of disconnected institutional silos, (2) align funding with the levels, strategies, and practices that produce the necessary outcomes, experienced equitably, (3) ensure that Oregon's educators are well-prepared and well-supported, (4) remove barriers to local innovation, (5) identify, support, and if necessary, intervene to improve struggling education entities, (6) research, identify and disseminate best practices, and (7) along with education entities and other partners, engage in two-way communication with the public about these efforts.

SB 909 directs the OEIB to hire a Chief Education Officer (CEdO). Following the 1-year service of Dr. Rudy Crew, in October 2013, the OEIB hired Dr. Nancy Golden to serve as CEdO. While the small staff that support the Chief Education Officer were originally a unit of the Governor's Office, in the 2013 session, the Legislature approved the creation of OEIB as a stand-alone agency. \$6,035,608 was appropriated for the OEIB agency, which is comprised of the CEdO, a small professional staff, and a P-20 Policy & Research Consortium, with policy direction provided by the OEIB Board.

The OEIB's overarching outcome is to ensure all Oregonians are prepared for lifelong learning, rewarding work, and engaged citizenship. Never before has this goal been more important to the lives and well-being of Oregonians and its communities. Education cements shared values, enriches culture and expands the personal horizons of individuals. Education advances family life, civic stability and democratic ideals. It provides opportunity for all, no matter their race, home language, disability or family income.

## BUDGET NARRATIVE

Further, as knowledge and innovation become the prime capital in this global economy, education increasingly determines the fortunes of individuals, communities and nations. Each year, well-paid jobs requiring only a high school diploma—the millwork or manufacturing jobs of the past—are replaced with new jobs that increasingly demand post-secondary education, technology skills and advanced training above the high school level. The shift is happening quickly. Over the next decade, 61 percent of all Oregon jobs will require a technical certificate, associate's degree or higher level of education. This proportion will only accelerate by 2025. Today, Oregonians with associate's degrees earn at least \$5,000 per year more than those with just a high school diploma. Those with bachelor's degrees earn approximately \$17,000 more per year. Eighty-nine percent of family wage jobs—jobs paying more than \$18 per hour—will require a technical certificate/associate's degree or higher level of education. Students emerging into this market need skills and education to compete and therefore need to complete a post-secondary education. To revitalize Oregon's economy, the workforce needs higher levels of knowledge and skills than ever before. The task of improving Oregon's education system is as daunting as it is imperative. Every year, 40,000 children are born in Oregon. Of those, roughly 40 percent are exposed to a well-recognized set of socio-economic, physical or relational risk factors that adversely affect their ability to develop the foundations of school success.

Oregon's cohort graduation rate tells us the percentage of students who entered high schools—as freshman or as later arrivals—that graduated with a regular diploma in four or five years. The overall four-year graduation rate for Oregon is 68.5% and for students of color less than 60%. Looking at a more expansive measure of students who earned a regular diploma, modified diploma or GED, one in five students (21 percent) still does not complete within five years. And far too many Oregon students don't even get captured in the cohort graduation or federal dropout rates because they leave school even before the ninth-grade starting point for those calculations.

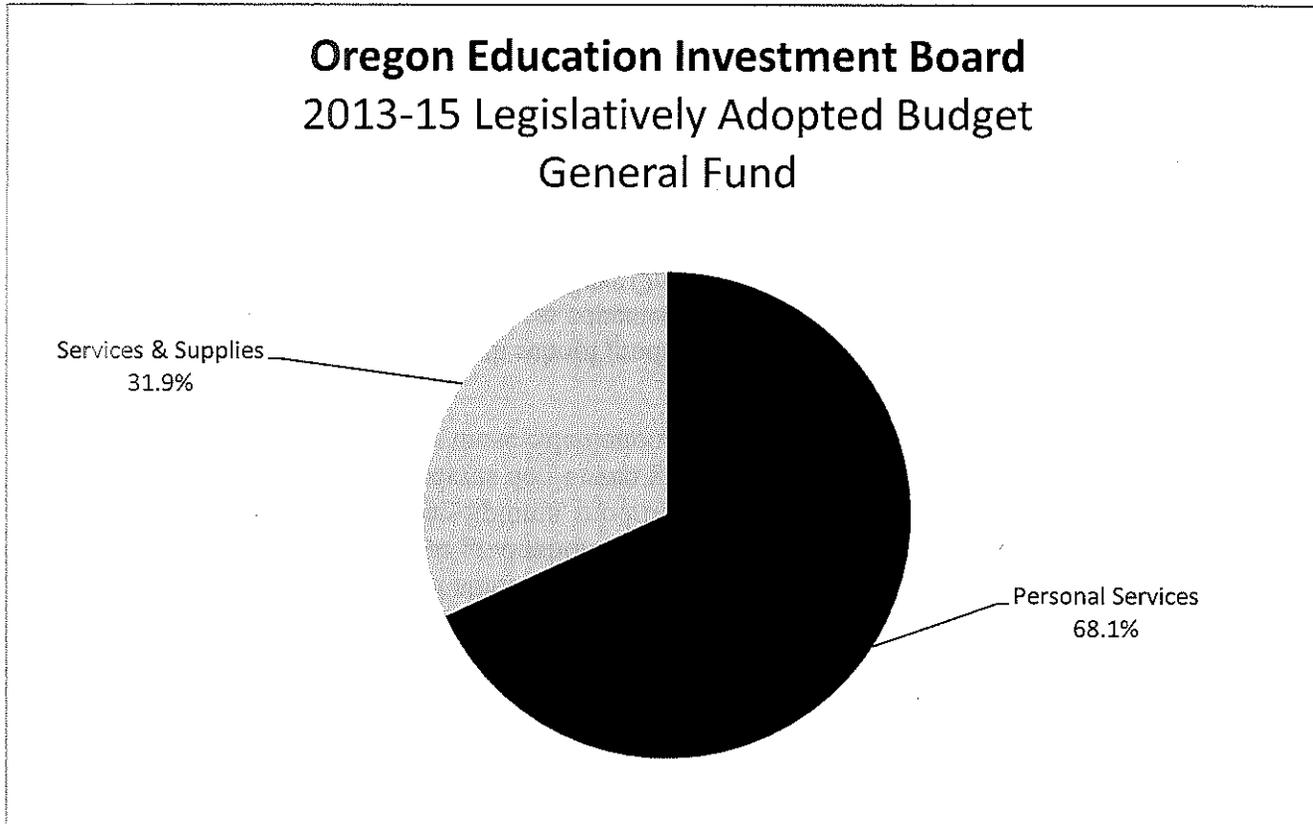
Currently, Oregon ranks 47<sup>th</sup> among states in the share of high school graduates who head to college, with only about half of students enrolling. Oregon's current generation of young adults—ages 25-34—is less educated than their parents' generation, with fewer earning a certificate or degree beyond high school. In addition to being less educated than older Oregonians, this generation is less educated than the national average and is falling behind compared to other countries. Currently, only about 46 percent Agency Request of young Oregonians have a post-secondary degree or certificate.

Perhaps the most pressing issue faced by Oregon is that, on nearly all these measures, the achievement rates for low-income learners, English language learners, special education students and students of color are significantly lower as compared to the general student population. Oregon's next generation, those of school and preschool ages, include greater proportions of students of color, students who are not native English speakers, and students from economically disadvantaged households. It is vital to ensure student success among all populations across the continuum through a focus on Oregon's changing demographics and demonstrated ability to well-serve the needs of all student populations and the growing percentage of Oregon's high school graduates needing basic skills upon entry into community college.

*Working-age adults are 25-64 years old; young adults are 25-34 years old. According to census data, 87 percent of young Oregonians reported having a high school degree. This may be because they completed high school later in life or, given the high numbers of educated people who move into Oregon, even more likely that represents many who obtained their diploma in other states or countries. Source: ECONorthwest analysis of data from the U.S. Census Bureau (American Community Survey), the Oregon Department of Education, and the National Student Clearinghouse*

# BUDGET NARRATIVE

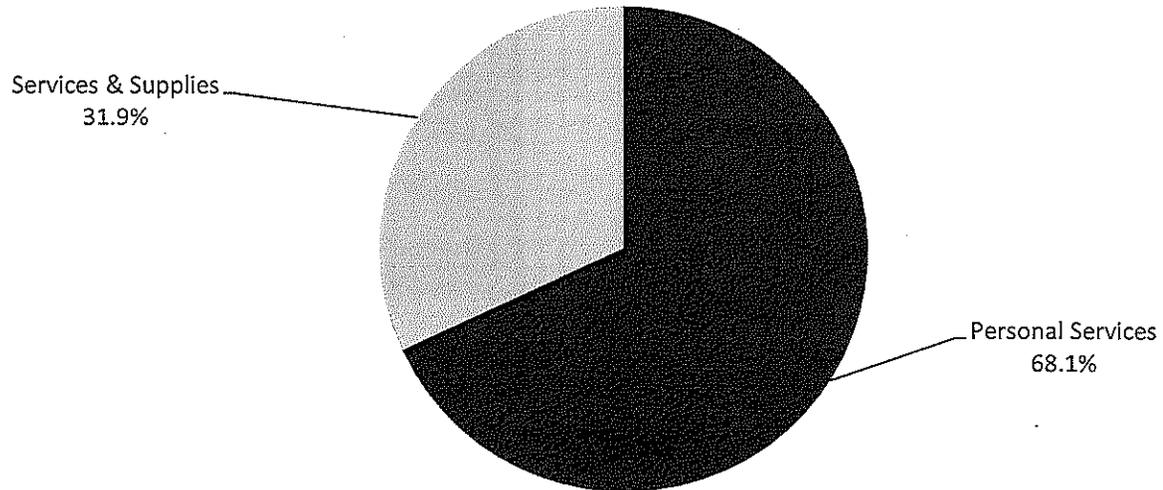
## Budget Summary Graphics



# BUDGET NARRATIVE

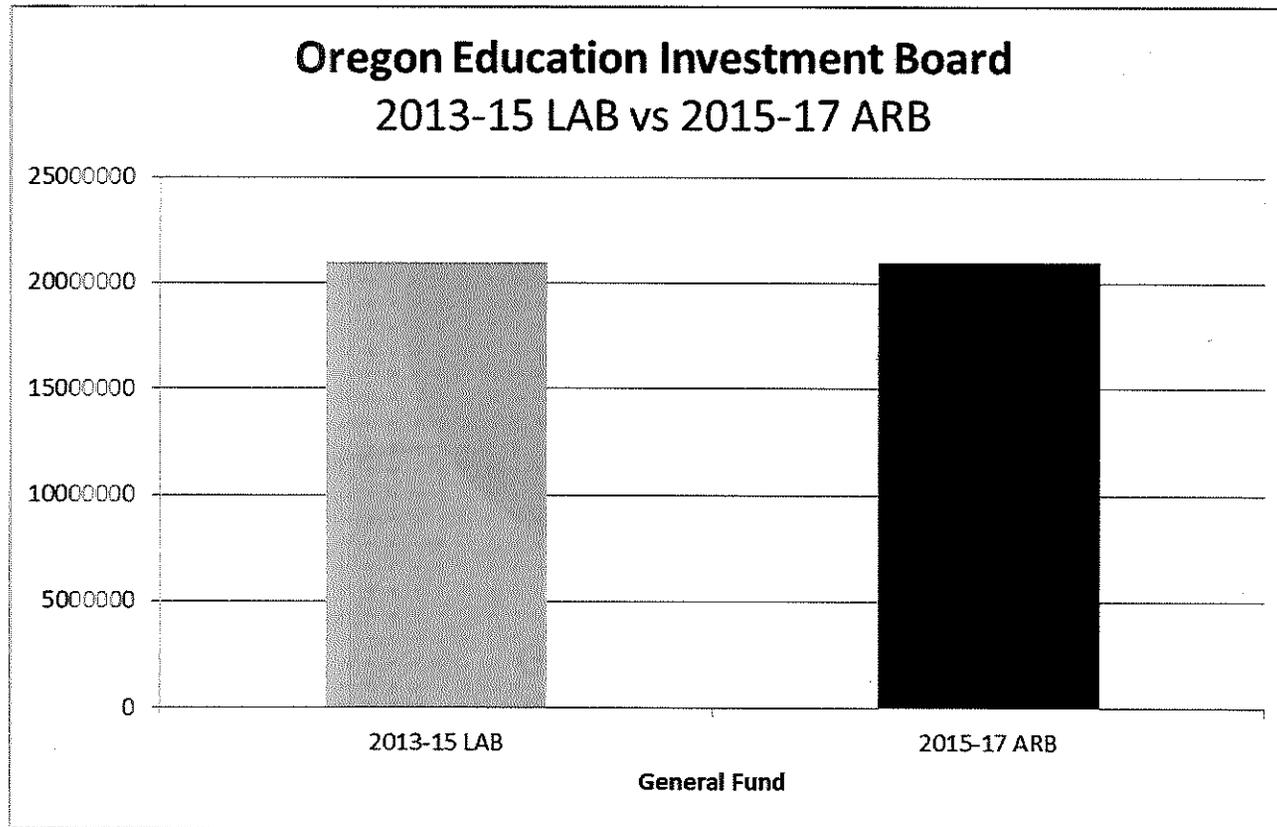
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## Oregon Education Investment Board 2015-17 Agency Request Budget General Fund



# BUDGET NARRATIVE

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# BUDGET NARRATIVE

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## **Mission Statement**

OEIB's vision is to advise and support the building, implementation and investment in a unified public education system in Oregon that meets the diverse learning needs of every pre-K through post-secondary student and provides boundless opportunities that support success. By doing so, we ensure 100% high school graduation by 2025 and ensure that Oregon students are college and career ready. 40-40-20 Goal: 40% completing 2-year degree, 40% completing 4-year degree and 20% career ready.

## **Statutory Authority**

The OEIB Board was created and charged with hiring a CEEdO pursuant to Chapter 519, Oregon laws 2012, Sec. 1 & 2 (SB 909) The authority of the CEEdO to direct and control the creation of a unified system of education was established by Chapter 26, Oregon laws, Section 14 (SB 1581). In 2013, the Legislature appropriated dollars to OEIB pursuant to SB 5548-A, creating OEIB as a stand-alone agency.

# BUDGET NARRATIVE

## Agency 2-year Plan

### Objectives

**Design and implement P-20 structure**

**Design/ implement\* initiatives to improve student achievement**

**Affect policies for initiatives and "loose/tight" direction**

**Create outcome-based budget, aligned to initiatives**

**Build an informed, engaged public**

### Initiatives/Outcomes

- P-20 integration
- Common, aligned standards, assessments, and support systems
- Longitudinal data system

Initiatives that directly affect student learning along the P-20 continuum  
Systems and cultures that address equity and result in learning environments that address needs of all learners  
Accountability systems  
Impact analysis of initiatives

- Policies that affect/ support achievement initiatives
- Policy framework consistent with "loose/tight" direction
- Policies that lessen compliance burden

- Multi-year strategic plan with outcomes and metrics
- Biennium budget aligned with plan and outcomes

- Channels of two-way communication
- Regional collaborations/ commitment to outcomes of Achievement Compacts
- Tools and practices for field to engage communities

\* Implementation includes establishing and conducting the protocols and processes of distributing resources to the field.

# BUDGET NARRATIVE

## Metrics for Objective 1: Complete design and implement P-20 structure

### OEIB Initiative

### OEIB Metric (June 2017)

A) Specify how to operationalize P-20 integration, particularly around governance and structure

Structure 100% designed, legislation passed, structure fully implemented  
100% of regions report increased satisfaction in support from OEIB

B) Implement common aligned learning standards, assessment tools, and support systems for P-20

Learning standards and assessment tools are compatible, integrated, and span across P-20

C) Complete longitudinal data system

Longitudinal data system is 100% complete and serves the functions identified by end users

# BUDGET NARRATIVE

**Metrics for Objective 2: Design and implement high-impact, cost-effective initiatives that improve achievement of all students**

## OEIB Initiative

A) Implement initiatives that directly affect student learning in all segments of P-20

## OEIB Metric (June 2017)

### Early Learning and Literacy:

- *Number of children ready to enter Kindergarten increases 20%\**
- *Number of 3rd graders reading at grade level increases 15% and achievement gap decreases 5%*



### Key Strategies

- Early childhood education redesign
- Regional hubs
- Expanded/individual learning time
- Increased library usage
- Literacy awareness campaign

\* Baseline not available at this time. Targets may change once baseline is established. Note: Italicized metrics are also reflected in the K-12 Achievement Compacts.

# BUDGET NARRATIVE

**Metrics for Objective 2: Design and implement high-impact, cost-effective initiatives that improve achievement of all students (cont.)**

## OEIB Initiative

A) Implement initiatives that directly affect student learning in all segments of P-20

## OEIB Metric (June 2017)

### Diverse Professional Corps of Educators:

- Number of education professionals (PK-12) projected to enter OR education workforce within two years who are non-white, non-Hispanic or whose native language is not English increases 10%\*
- Levels of employer satisfaction with new teachers prepared in OR increases 30%\*
- At least 30% more educators report increased satisfaction in professional support/development\*
- Early childhood educators who achieve AA or higher on OR Registry increases 30%

### Key Strategies

Statewide effort to recruit, prepare, and support educators:

- Four to six professional development centers
- New career maps and licensure structures
- Teacher collaboration and mentorship
- Dissemination of best practices and models
- Focus on early educators and post-secondary faculty
- TELLS Survey

\* Baseline not available at this time. Targets may change once baseline is established.

# BUDGET NARRATIVE

**Metrics for Objective 2: Design and implement high-impact, cost-effective initiatives that improve achievement of all students (cont.)**

## OEIB Initiative

A) Implement initiatives that directly affect student learning in all segments of P-20

## OEIB Metric (June 2017)

### Connecting to the World of Work:

- *Number of students who demonstrate proficiency in math and science in Middle School increases 15% and achievement gap decreases 5%*
- *At least 65% of students who graduate HS earned nine or more college credits and the achievement gap decreases 5%\**
- *At least 90% of students who graduate from OR education system are employed within 12 months\**



### **Key Strategies**

- STEM initiatives – e.g., STEM schools
- Internships and apprenticeships for students
- Grade 11-14 redesign and dual enrollment
- Essential skills curriculum
- Connections to career and technical trade unions
- Integration of arts into curriculum

\* Baseline not available at this time. Targets may change once baseline is established.

Note: Italicized metrics are also reflected in the K-12 Achievement Compacts.

# BUDGET NARRATIVE

Metrics for Objective 2: Design and implement high-impact, cost-effective initiatives that improve achievement of all students (cont.)

## OEIB Initiative

A) Implement initiatives that directly affect student learning in all segments of P-20

## OEIB Metric (June 2017)

### Post-Secondary Aspirations:

- At least 85% of students will be on track for graduation by the end of 9th grade with no gaps greater than 10%\*
- *Five-year cohort graduation rate increases 10 percentage points and achievement gap decreases 5%*
- *Post-secondary completion of underserved students increases 10 percentage points (gap eliminated)*



### Key Strategies

- Transitional supports at critical entry points (K-20)
- Advanced Placement course offerings
- Services for at-risk youth
- Credits universally accepted throughout OU system
- Increase of post-secondary access and retention

\* Baseline not available at this time. Targets may change once baseline is established.

Note: Italicized metrics are also reflected in the K-12 Achievement Compacts.

# BUDGET NARRATIVE

## Metrics for Objective 2: Design and implement high-impact, cost-effective initiatives that improve achievement of all students (cont.)

### OEIB Initiative

B) Shift systems and cultures to address equity and result in learning environments that address needs of all learners

### OEIB Metric (June 2017)

*At least 75% of Priority and Focus schools will achieve growth for all students and for subgroups greater than the state average*

Number of students who have or are receiving ELL services reading at grade level by 5<sup>th</sup> grade increases 75%



### **Key Strategies**

- Reengagement of hard-to-reach youth (immigrants, homeless, dropouts, and gangs)
- West Coast network to elevate and share tools and talent for immediate and continued growth of ELL
- Intense support of and guidance to Priority and Focus Schools
- Policy and planning documents for dissemination throughout PK-12 leadership
- Focus on reducing need for, while improving quality of, post-secondary developmental education

\* Baseline not available at this time. Targets may change once baseline is established. **Note:** Italicized metrics are also reflected in the K-12 Achievement Compacts.

## BUDGET NARRATIVE

**Metrics for Objective 2: Design and implement high-impact, cost-effective initiatives that improve achievement of all students (cont.)**

### **OEIB Initiative**

C) Determine and implement processes of support and accountability (including Achievement Compacts and OR Report Card)

D) Analyze initiatives to understand impact and ROI

### **OEIB Metric (June 2017)**

Data from accountability system is used to affect policy and change practice  
At least 80% of educators, students, and families surveyed report accountability system as useful\*

100% of key initiatives are analyzed for impact and ROI  
ROI information is used to develop policies and recommend strategic investments

\* Baseline not available at this time. Targets may change once baseline is established.

Note: Italicized metrics are also reflected in the K-12 Achievement Compacts.

## BUDGET NARRATIVE

**Metrics for Objective 3: Assess, write, and respond to policies needed to accomplish initiatives and create "tight/loose" direction of Oregon Learns**

### **OEIB Initiative**

- A) Analyze, write, and advocate policies that support initiatives and affect how education is delivered in the field
- B) Create policy framework, including R&D, consistent with "tight/loose" direction
- C) Review current policies with eye towards which should be eliminated to achieve initiatives and lessen compliance burden

### **OEIB Metric (June 2017)**

Policies, explicitly linked to strategic initiatives, demonstrate impact on student performance. Policies affected/created are regarding:

- Educator workforce (licensure, minority recruitment)
- Grade 11-14 redesign (funding formula, credit transferability)
- Equity (data collection, accountability)
- Early learning (hubs, Kindergarten readiness, subsidy policy)
- Diploma and credentials (Oregon diploma rollout, career pathways)
- Mandate relief

# BUDGET NARRATIVE

## Metrics for Objective 4: Create outcome-based budget, aligned to student achievement initiatives

### OEIB Initiative

A) Create, monitor, and revise the strategic and operations plan (including metrics)

B) Contribute to the development of the biennium budget, tying budget to strategic initiatives

### OEIB Metric (June 2017)

Strategic plan and metrics are monitored at least biannually, and updated and shared at least annually  
Multi-year strategic plan and metrics for 2015 and beyond is created

Budget recommendations are developed, explicitly aligned to strategic initiatives and outcomes, and delivered on time

# BUDGET NARRATIVE

## Metrics for Objective 5: Work to build an informed, motivated, and engaged public

### OEIB Initiative

A) Create channels of two-way communication with major stakeholders about the need for change, strategies, and opportunities for engagement

B) Use achievement compacts to establish regional collaborations and community commitment to meeting outcomes

C) Support learning organizations in creating strategies, tools, and practices to engage their communities

### OEIB Metric (June 2017)

At least 85% of stakeholders feel "adequately informed"\*  
At least 90% of stakeholders report having adequate opportunities to provide input\*

100% of regions report having business and community partners engaged in meeting Achievement Compact goals

85% of education institutions report that the created tools and processes have been useful in engaging their communities

\* Baseline not available at this time. Targets may change once baseline is established.

# BUDGET NARRATIVE

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## Program Descriptions

### Office of the Chief Education Officer

The Oregon Education Investment Board is responsible for building a seamless, more rigorous accountable P-20 system which begins with **eliminating the silos** between early learning, K-12, and post-secondary education and training and **making the connections** between:

- **Pre-school Health/Nutrition** and Kindergarten Readiness
- **Kindergarten Readiness** and Third Grade Reading Proficiency
- **Third Grade Reading Proficiency** and High School Graduation
- **High School Graduation/Degree Attainment** and **Income Mobility**

Thus, the activities of the Office of the Chief Education Officer center around the following:

- (1) Staffing the OEIB Board and its subcommittees to complete their work;
- (2) Supporting the Chief Education Officer in her critical role of directing and controlling the P-20 Education System, including the Early Learning Systems Director, the Deputy Superintendent of Public Instruction, and the Executive Director of the Higher Education Coordinating Commission;
- (3) Focusing the state on key education outcomes, through achievement compacts, and developing, directing and disseminating key best practices and policies to ensure the state reaches its outcome goals; and
- (4) Creating a motivated and engaged public.

The OEIB's staff and brief description of duties:

**Chief Education Officer:** Oversees the creation, implementation and management of an integrated and aligned public education system from birth to college & career. Supporting key educational transitions for students; alleviating barriers to achievement; recommending strategic investments to the Governor and legislature that are outcome driven. All recommendations to be aligned with OEIB's commitment to the Equity Lens.

**Executive Assistant to the CEo:** Provides support to the Chief Education Officer and the OEIB team on scheduling, meeting coordination and community relations initiatives.

## BUDGET NARRATIVE

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**Chief of Staff/Legislative Director:** Deputy to the Chief Education Officer, lead policy advisor, speaks on behalf of the Chief Education Officer, works with CEEdO to develop and recommend education policy to the legislature for implementation in agencies and institutions across the education continuum. Works directly with legislators around legislation, policies and investment.

**Office Manager and assistant to Chief of Staff:** Manages all aspects of the OEIB office including: technology; new staffing and orientation; budget and contract adherence; essential trainings and supports various meetings for the OEIB staff. Provides support to the Chief of Staff/Legislative Director.

**Board Administrator:** Serves as the liaison between the OEIB staff and the Oregon Education Investment Board; supports all aspects of board meeting coordinating and ongoing communications to Board Members. Serves as the Oregon Administrative Rules Coordinator for OEIB, reviewing proposed statutes based upon current statute or legislative changes. Track bills through the legislative process and recommends agency policy and OAR revisions. Maintains the OEIB website.

**College & Career Readiness Director:** Policy related to educator preparation and post-secondary transitions; college and career readiness. Emphasis on recruitment, preparation, licensure, mentoring, professional support and evaluation of educations; successful completion of post-secondary certificates and degrees in community colleges, state's public universities and private institutions; access and affordability for post-secondary students.

**Equity and Community Engagement Director:** Coordinates initiatives and policies related to the transition of students, improving early literacy outcomes, promoting equity, and building community & family engagement. Identify best practices to improve outcomes for underserved students including developing policy recommendation on chronic absenteeism, over identification of students for special educations, and students being pushed out of schools.

**STEM Director:** Works with STEM Investment Council, Oregon Department of Education and post-secondary institutions to develop a long-term statewide plan for improving science, technology, engineering, math and career/technical outcomes through targeted investments and business/community partnerships.

**Communications Director:** Leads strategic communication and outreach strategies to effectively engage Oregonians in the policy work of OEIB; manages all media and community relations efforts and acts as a spokesperson as needed. Oversees the Statewide Reading Campaign.

**Assistants to the Directors:** Supports Office Manager and provides administrative support, scheduling, meeting coordination and preparations.

# BUDGET NARRATIVE

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## Research & Policy Unit

The Research & Policy Unit supports the Oregon Education Investment Board (OEIB) and the Chief Education Officer to fulfill the statutory charge to recommend to the Governor and Legislature policy and strategic investments to achieve Oregon's 40-40-20 goals for education. On behalf of the OEIB, Governor, and Legislature, the Research and Policy Unit conducts and synthesizes research, evidence-based models and best practices to evaluate the impact of recommended strategic investments, policy and initiatives across the P-20 public education system. The Research and Policy Unit is also responsible for inter-agency coordination and implementation of the State Longitudinal Data System for P-20 public education.

**Research and Policy Director:** The Research and Policy Director manages the Research & Policy Unit and is responsible for building a resource allocation model for strategic investment and policy prioritization, developing a research agenda in conjunction with consortium partners and public and private entities, and assessing the use and effectiveness of achievement compacts submitted to the OEIB and Chief Education Officer by P-20 education institutions. The Research Director leads the Steering Committee for the State Longitudinal Data System for Education, and is staff to the Equity and Partnerships and Outcomes and Investments Subcommittees of the Oregon Education Investment Board.

**Research & Policy Deputy Director:** Serves under the direction of the Research & Policy Director and assists in the creation of return on investment models and developing a research agenda for best practices and evidence-based models for improving key education outcomes for students of color, English language learners and rural students. The Deputy Director is the OEIB's lead researcher for work relating to culturally responsive practices to support equitable outcomes, and represents the Oregon Education Investment Board on the Government to Government.

**Research Analysts:** Serves under the direction of the Research & Policy Director and Deputy Director to gather, analyze and summarize educational research on behalf of the OEIB, Legislators and Governor. Lead researcher for work relating to the improvement of post-secondary teaching practices and analyses of best practices in Science, Technology, Education, and Math programs from pre-school to post-secondary. Provides research for policy development.

**Project Manager, State Longitudinal Data System (SLDS):** Serves under the direction of the Research and Policy Director as the coordinator for the core interagency SDLS project team and the State Longitudinal Data System Steering Committee. The project manager is responsible for the creation and organization of all project materials, including detailed plans and budget, risk assessment, system requirements.

**Database Integration Specialist:** Works under the direction of the Research and Policy Director and is responsible for the design of the State Longitudinal Data System, coordinating the collection of data from other State agencies which maintain student data. The data Integration Specialist develops algorithms to connect data between agencies to build longitudinal student records, and serves as the designer of the SLDS portal.

# BUDGET NARRATIVE

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## Statewide Literacy Campaign

Pursuant to HB 3232, the 2013-15 LAB included, as part of the strategic investment package in early reading, an appropriation of \$250,000 to the OEIB to lead a statewide literacy campaign.

The Statewide Literacy Campaign was designed to heighten awareness for the importance of early reading to putting students on track for lifelong success. A key component of the initiative is strategies to engage and galvanize Oregonians to support families to ensure students across the state are proficient readers by 3rd grade. The initiative is designed to be a vehicle that knits together all of the efforts and investments from birth to 3rd grade that are preparing students for kindergarten and 3rd grade reading proficiency.

The campaign is primarily targeted towards parents and families, particularly those who experience the most significant barriers to supporting their children with literacy building at home. The effort includes messaging and calls to action for community and culturally specific organizations, libraries, school districts, Early Learning Hubs, Regional Achievement Collaboratives, and businesses to take specific action to support families and students with literacy skill building.

Communication and engagement strategies have been developed to complement the work already being done by parents, educators and community partners through existing statewide efforts. The campaign plan was designed to leverage existing efforts both within the education system as well as from community partners around the state to carry the messages and engagement activities designed for parents.

The statewide communications efforts provided under the Statewide Literacy Campaign, launched under the name *StORytime, Every day Everywhere* approaches communication about reading differently. It empowers parents to use myriad ways to support their children that can be incorporated into daily life, easily fit into busy schedules, allow for low-literacy levels, and encourage teaching in multiple languages.

The first phase of the campaign, which is being launched in September 2014, will support more focused, community driven launch in five designated focus communities. The next biennium will include an expansion to statewide efforts and to additional focus communities who experience similar barriers as those selected in the first phase.

# BUDGET NARRATIVE

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## Regional Achievement Collaboratives

The 2013-15 LAB provided for the development of a Regional Achievement Collaborative pilot. The purpose of the pilot is to provide capacity for regions that commit to bringing together representatives from across the Birth to College and Career continuum to engage collectively around the compact outcomes. The twelve (12) regions engaged in the pilot are also building collective responsibility, by engaging community leaders, businesses, social service providers and parents, thereby broadening responsibility for student learning and success beyond school walls.

In 2013-15, \$500,000 was appropriated for the purpose of providing capacity to the Regional Achievement Collaboratives (RACs). OEIB provided between \$40,000 – 50,000 to 12 regions. The RACs used the funding to support coordination, capacity, and RAC programming.

An additional \$250,000 was appropriated to support statewide convening's of the RACs, as well as other peer-to-peer learning events. The OEIB has successfully completed 2 statewide convening's – a "Kick-off" event in September in Salem, which was attended by nearly 200 RAC partners and education leaders; and a "RAC Summit" in August in Bend, which was attended by more than 150 education and community leaders from across Oregon. 87% of the attendees completed participant evaluations and rated the Summit as valuable or very valuable to their work.

In the 2015-17 biennium, OEIB is requesting continued funding of the RAC project. The intent is for a Request for Qualifications to be issued in July 2015 to any region / community who did not have a pilot project, with the intent of funding an additional 2-4 RACs. In addition, modest (\$30,000-40,000) continuation grants would be available to existing RACs who can demonstrate commitment to continued collaboration and achievement of key student outcomes. At least 2 additional statewide convening's would be funded through the RAC project, as well as continued project management, communication, and learning collaborative support.

## Environmental Factors

Oregon's investment in education per student from kindergarten through high school (K-12 education) is less today than it was in 1990.

Today, revenue dedicated per-pupil for K-12 education is \$9,147. However, when adjusted for inflation using the Education Sector Price Index developed by the Oregon Department of Education, revenue dedicated per-pupil for K-12 education has dropped from \$4,551 in 1990 to \$3,724 in 2013. Postsecondary education has seen an actual reduction in state support over the same time period. State support for our community colleges and universities has declined by 34 percent on a per student basis over the past five years. As a result, Oregon ranks 47<sup>th</sup> of the 50 states in state appropriations per student in our public postsecondary institutions, according to the most recent study released by the State Higher Education Executive Officers in 2014.

The dire financial situation has forced school districts and post-secondary institutions to cut millions from their budgets in the past four years,

# BUDGET NARRATIVE

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laying off valued employees, reducing school days, and shutting down schools and programs against the wishes of the community. In K-12, the federal government has, in an attempt to improve the quality of education, burdened the state with federal mandates, paperwork and budget restrictions. Further, over the last 20 years, increases in health insurance costs and fluctuations in the state's PERS expenses have resulted in increases in these costs that far outpace general inflation, hitting all public education institution budgets hard and shifting resources out of the classroom.

Entrenched interests, fear and suspicion, fatigue from many years of top-down reforms, and a strong tendency to blame rather than share responsibility has led to an environment in which improvement is not only difficult, it can seem impossible.

## Initiatives and Accomplishments

In 2013 and 2014, the OEIB has

- In 2013-15, for the first time, the Governor's Recommended Budget was built by examining what investments were likely to achieve this set of key outcomes rather than by simply adjusting "current services levels." Working together, the Governor and Legislature were able to significantly increase funding for education at all levels to support our youngest Oregonians by advancing the early learning hub system, and to agree on changes to post-secondary governance that will allow increased autonomy while promoting improved access and outcomes for Oregon's students.
- The 2013-15 Legislatively Approved Budget (LAB) for education also included a set of strategic investments developed by the OEIB and Chief Education Officer. This \$74 million in investments – in strategies to improve early literacy, support 9<sup>th</sup> graders to be on track, ensure students have opportunities for STEM, STEAM and CTE, and support educators – were selected to rapidly improve performance on the compact outcomes, close achievement gaps, encourage collaboration, leverage resources, and provide the state a platform through which to replicate best practices across the state.
- Hired Dr. Nancy Golden as the state's 2<sup>nd</sup> Chief Education Officer – bringing a proven track record of leadership, collaboration, and vision

## BUDGET NARRATIVE

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- Developed the OEIB quarterly Scorecard, a public document that tracks the Board's progress on strategies and metrics that are included in the OEIB Strategic Plan.
- Worked closely with Oregon Department of Education on the implementation of approximately \$75 million in strategic investments in early reading, guidance & support for post-secondary aspirations, connecting to the world of work, and supporting a network for quality teaching and learning.

# BUDGET NARRATIVE

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## Criteria for 2015-2017 Budget Development

The OEIB's budget was developed with the following criteria in mind: (1) efficiency and flexibility; (2) ability to implement the OEIB key strategies:

- Create a coordinated, student-centered education system, from birth through college and career readiness (0-20), to enable all Oregon students to learn at their best pace and achieve their full potential. At the state level, this will require integration of Oregon's capacities, articulation across PK-20, relief from mandates, and more strategic use of resources to encourage and support successful teaching and learning across the education continuum.
- Focus state investment on achieving student outcomes: The state must define the core student and community outcomes that matter in education, start early in ensuring young children are ready for school, support districts education institutions in setting goals around those core outcomes and take mutual responsibility for achieving the goals. The state must drive state and local investment strategies toward achieving these outcomes for students, being much more intentional about investing in the programs, services, tools, leverage points and the community strategies that will make the biggest difference for effective teaching and learning and student success.
- Build statewide support systems: The state's role is not to deliver education, but rather to invest in and support the thousands of institutions and providers across the state that do. To succeed, Oregon must engage educators and leaders, students and families, communities, and employers to achieve the educational excellence envisioned for Oregonian students. The state will continue to set standards, provide guidance, and conduct assessments, coordinated along the education pathway. Nevertheless, the state must also focus on researching what works, providing a structure to support continuous improvement, improving educator effectiveness, and increasing support for educational entities and their educators.

# BUDGET NARRATIVE

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## Major Information Technology Projects/Initiatives

SB 909 (2011) directed the OEIB to provide an integrated, statewide, student-based data system that monitors expenditures and outcomes to determine the return on statewide education investments. The OEIB has defined the purposes of this database as (1) ensuring that longitudinal student information and outcome data is available at the provider and policy-maker level and (2) supporting teaching and learning, providing information to students and parents, and supporting the identification and dissemination of best practices across outcomes.

In February 2014, the Ways and Means Education Subcommittee received a business case from the Oregon Education Investment Board (OEIB) for a Statewide Longitudinal Data System P-20 for Education (OEIB-SLDS). The business case recommended a particular solution for Oregon, with an initial cost estimate of \$8.6 million over three years, of which \$750,000 has been allocated in the current biennium.

In response to that recommendation, HB 5201 (2014) contained a Budget Note to the OEIB directing it to coordinate work with the Oregon Department of Education (ODE), the Higher Education Coordinating Commission (HECC), other education related agencies, and the Office of the Chief Education Officer to produce an additional set of deliverables and evidence of specific activities:

1. Produce a refined business case.
2. Produce a detailed project budget and schedule for design, development and implementation of the OEIB-SLDS.
3. Select and contract with an independent Quality Assurance contractor to: complete quality control reviews of the refined business case and foundational project management documents; complete a project risk assessment.

The OEIB will report to the Emergency Board in December 2014 with project deliverables sufficient to request up to \$3.5 million.

**Summary of 2015-17 Biennium Budget**

Oregon Education Investment Board  
 Oregon Education Investment Board  
 2015-17 Biennium

Agency Request Budget  
 Cross Reference Number: 52400-000-00-00-00000

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
2013-15 Leg Adopted Budget	15	15.00	6,035,608	6,035,608	-	-	-	-	-
2013-15 Emergency Boards	-	-	14,972,691	14,972,691	-	-	-	-	-
<b>2013-15 Leg Approved Budget</b>	<b>15</b>	<b>15.00</b>	<b>21,008,299</b>	<b>21,008,299</b>	-	-	-	-	-
<b>2015-17 Base Budget Adjustments</b>									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	-	-	2,146	2,146	-	-	-	-	-
Estimated Cost of Merit Increase	-	-	-	-	-	-	-	-	-
Base Debt Service Adjustment	-	-	-	-	-	-	-	-	-
Base Nonlimited Adjustment	-	-	-	-	-	-	-	-	-
Capital Construction	-	-	-	-	-	-	-	-	-
<b>Subtotal 2015-17 Base Budget</b>	<b>15</b>	<b>15.00</b>	<b>21,010,445</b>	<b>21,010,445</b>	-	-	-	-	-
<b>Essential Packages</b>									
010 - Non-PICS Pers Svc/Vacancy Factor									
Non-PICS Personal Service Increase/(Decrease)	-	-	15,232	15,232	-	-	-	-	-
Subtotal	-	-	15,232	15,232	-	-	-	-	-
020 - Phase In / Out Pgm & One-time Cost									
021 - Phase-in	-	-	15,820,210	15,820,210	-	-	-	-	-
022 - Phase-out Pgm & One-time Costs	-	-	-	-	-	-	-	-	-
Subtotal	-	-	15,820,210	15,820,210	-	-	-	-	-
030 - Inflation & Price List Adjustments									
Cost of Goods & Services Increase/(Decrease)	-	-	59,430	59,430	-	-	-	-	-
State Gov't & Services Charges Increase/(Decrease)	-	-	10,550	10,550	-	-	-	-	-
Subtotal	-	-	69,980	69,980	-	-	-	-	-

**Summary of 2015-17 Biennium Budget**

Oregon Education Investment Board  
 Oregon Education Investment Board  
 2015-17 Biennium

Agency Request Budget  
 Cross Reference Number: 52400-000-00-00-00000

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
040 - Mandated Caseload									
040 - Mandated Caseload	-	-	-	-	-	-	-	-	-
050 - Fundshifts and Revenue Reductions									
050 - Fundshifts	-	-	-	-	-	-	-	-	-
060 - Technical Adjustments									
060 - Technical Adjustments	-	(9.75)	(24,003,514)	(24,003,514)	-	-	-	-	-
<b>Subtotal: 2015-17 Current Service Level</b>	<b>15</b>	<b>5.25</b>	<b>12,912,353</b>	<b>12,912,353</b>	-	-	-	-	-

**Summary of 2015-17 Biennium Budget**

Oregon Education Investment Board  
 Oregon Education Investment Board  
 2015-17 Biennium

Agency Request Budget  
 Cross Reference Number: 52400-000-00-00-00000

Description	Positions	Full-Time Equivalent (FTE)	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds
<b>Subtotal: 2015-17 Current Service Level</b>	<b>15</b>	<b>5.25</b>	<b>12,912,353</b>	<b>12,912,353</b>	-	-	-	-	-
070 - Revenue Reductions/Shortfall									
070 - Revenue Shortfalls	-	-	-	-	-	-	-	-	-
<b>Modified 2015-17 Current Service Level</b>	<b>15</b>	<b>5.25</b>	<b>12,912,353</b>	<b>12,912,353</b>	-	-	-	-	-
080 - E-Boards									
080 - May 2014 E-Board	-	-	-	-	-	-	-	-	-
<b>Subtotal Emergency Board Packages</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
Policy Packages									
101 - Removal of OEIB sunset	-	9.75	24,003,513	24,003,513	-	-	-	-	-
102 - Reconfiguration of ETIC funding	1	1.00	(24,233,677)	(24,233,677)	-	-	-	-	-
<b>Subtotal Policy Packages</b>	<b>1</b>	<b>10.75</b>	<b>(230,164)</b>	<b>(230,164)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total 2015-17 Agency Request Budget</b>	<b>16</b>	<b>16.00</b>	<b>12,682,189</b>	<b>12,682,189</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
Percentage Change From 2013-15 Leg Approved Budget	6.70%	6.70%	-39.60%	-39.60%	-	-	-	-	-
Percentage Change From 2015-17 Current Service Level	6.70%	204.80%	-1.80%	-1.80%	-	-	-	-	-

**Summary of 2015-17 Biennium Budget**

Oregon Education Investment Board  
 Oregon Education Investment Board  
 2015-17 Biennium

Agency Request Budget  
 Cross Reference Number: 52400-001-00-00-00000

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
2013-15 Leg Adopted Budget	15	15.00	6,035,608	6,035,608	-	-	-	-	-
2013-15 Emergency Boards	-	-	14,972,691	14,972,691	-	-	-	-	-
<b>2013-15 Leg Approved Budget</b>	<b>15</b>	<b>15.00</b>	<b>21,008,299</b>	<b>21,008,299</b>	-	-	-	-	-
<b>2015-17 Base Budget Adjustments</b>									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	-	-	2,146	2,146	-	-	-	-	-
Estimated Cost of Merit Increase	-	-	-	-	-	-	-	-	-
Base Debt Service Adjustment	-	-	-	-	-	-	-	-	-
Base Nonlimited Adjustment	-	-	-	-	-	-	-	-	-
Capital Construction	-	-	-	-	-	-	-	-	-
<b>Subtotal 2015-17 Base Budget</b>	<b>15</b>	<b>15.00</b>	<b>21,010,445</b>	<b>21,010,445</b>	-	-	-	-	-
<b>Essential Packages</b>									
010 - Non-PICS Pers Svc/Vacancy Factor									
Non-PICS Personal Service Increase/(Decrease)	-	-	15,232	15,232	-	-	-	-	-
<b>Subtotal</b>	-	-	<b>15,232</b>	<b>15,232</b>	-	-	-	-	-
020 - Phase In / Out Pgm & One-time Cost									
021 - Phase-in	-	-	15,820,210	15,820,210	-	-	-	-	-
022 - Phase-out Pgm & One-time Costs	-	-	-	-	-	-	-	-	-
<b>Subtotal</b>	-	-	<b>15,820,210</b>	<b>15,820,210</b>	-	-	-	-	-
030 - Inflation & Price List Adjustments									
Cost of Goods & Services Increase/(Decrease)	-	-	59,430	59,430	-	-	-	-	-
State Gov't & Services Charges Increase/(Decrease)	-	-	10,550	10,550	-	-	-	-	-
<b>Subtotal</b>	-	-	<b>69,980</b>	<b>69,980</b>	-	-	-	-	-

**Summary of 2015-17 Biennium Budget**

Oregon Education Investment Board  
 Oregon Education Investment Board  
 2015-17 Biennium

Agency Request Budget  
 Cross Reference Number: 52400-001-00-00-00000

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
040 - Mandated Caseload									
040 - Mandated Caseload	-	-	-	-	-	-	-	-	-
050 - Fundshifts and Revenue Reductions									
050 - Fundshifts	-	-	-	-	-	-	-	-	-
060 - Technical Adjustments									
060 - Technical Adjustments	-	(9.75)	(24,003,514)	(24,003,514)	-	-	-	-	-
<b>Subtotal: 2015-17 Current Service Level</b>	<b>15</b>	<b>5.25</b>	<b>12,912,353</b>	<b>12,912,353</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

**Summary of 2015-17 Biennium Budget**

Oregon Education Investment Board  
 Oregon Education Investment Board  
 2015-17 Biennium

Agency Request Budget  
 Cross Reference Number: 52400-001-00-00-00000

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
Subtotal: 2015-17 Current Service Level	15	5.25	12,912,353	12,912,353	-	-	-	-	-
070 - Revenue Reductions/Shortfall									
070 - Revenue Shortfalls	-	-	-	-	-	-	-	-	-
Modified 2015-17 Current Service Level	15	5.25	12,912,353	12,912,353	-	-	-	-	-
080 - E-Boards									
080 - May 2014 E-Board	-	-	-	-	-	-	-	-	-
Subtotal Emergency Board Packages	-	-	-	-	-	-	-	-	-
Policy Packages									
101 - Removal of OEIB sunset	-	9.75	24,003,513	24,003,513	-	-	-	-	-
102 - Reconfiguration of ETIC funding	1	1.00	(24,233,677)	(24,233,677)	-	-	-	-	-
Subtotal Policy Packages	1	10.75	(230,164)	(230,164)	-	-	-	-	-
<b>Total 2015-17 Agency Request Budget</b>	<b>16</b>	<b>16.00</b>	<b>12,682,189</b>	<b>12,682,189</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
Percentage Change From 2013-15 Leg Approved Budget	6.70%	6.70%	-39.60%	-39.60%	-	-	-	-	-
Percentage Change From 2015-17 Current Service Level	6.70%	204.80%	-1.80%	-1.80%	-	-	-	-	-



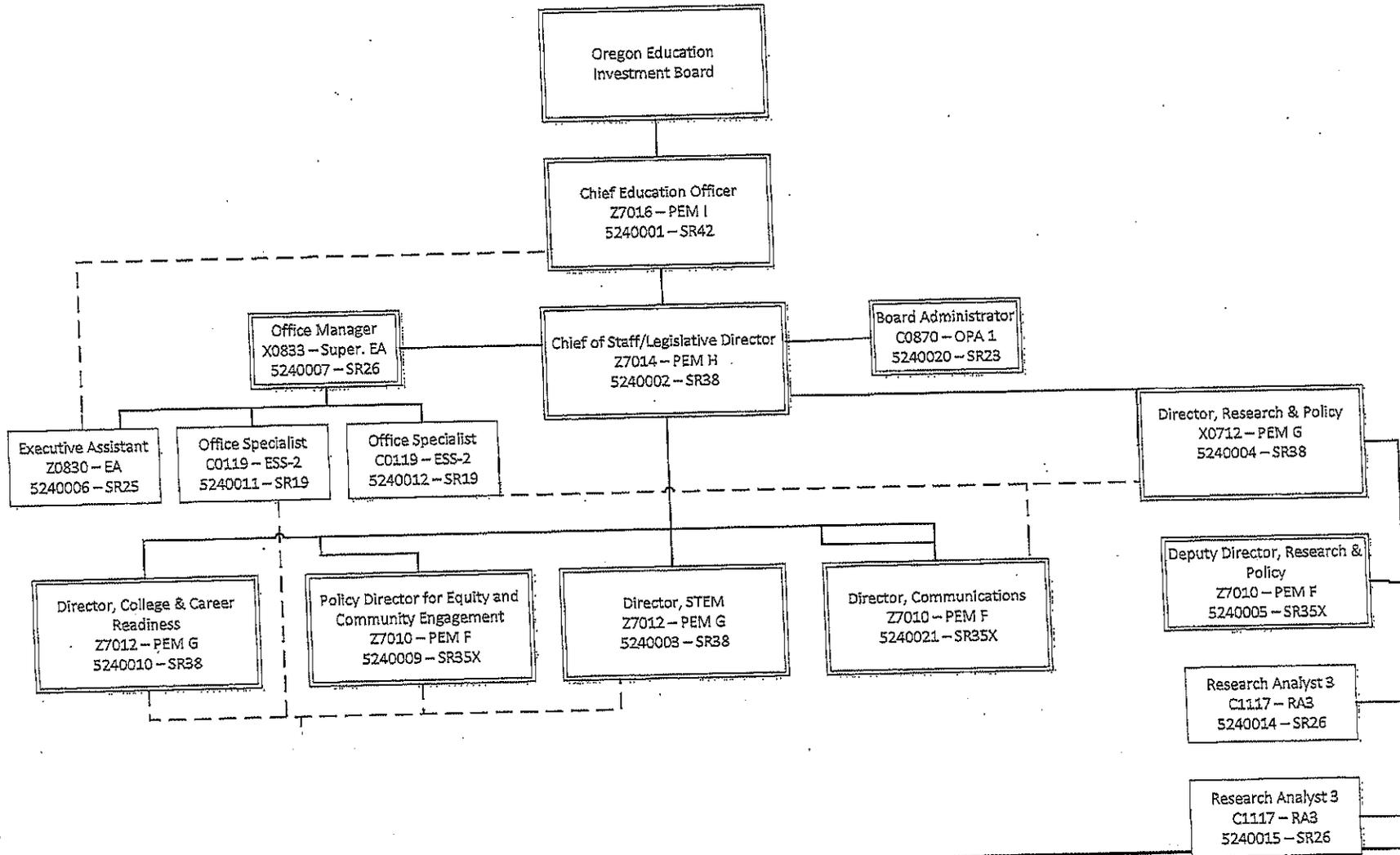
## BUDGET NARRATIVE

### Reduction Options

ACTIVITY OR PROGRAM <small>(WHICH PROGRAM OR ACTIVITY WILL NOT BE UNDERTAKEN)</small>	DESCRIBE REDUCTION <small>(DESCRIBE THE EFFECTS OF THIS REDUCTION. INCLUDE POSITIONS AND FTE IN 2015-17 AND 2017-19)</small>	AMOUNT AND FUND TYPE <small>(GF, LF, OF, FF. IDENTIFY REVENUE SOURCE FOR OF, FF)</small>	RANK AND JUSTIFICATION <small>(RANK THE ACTIVITIES OR PROGRAMS NOT UNDERTAKEN IN ORDER OF LOWEST COST FOR BENEFIT OBTAINED)</small>
1. Agencywide	\$645,617	\$645,617	OUTSIDE ORGANIZATIONS AND CONSULTANTS ARE UNIQUELY ORGANIZED AND SPECIFICALLY TRAINED TO COMPLETE TARGETED COMPONENTS ESSENTIAL TO OEIB'S WORK AND PERMIT THE AGGRESSIVE TIMELINES OEIB HAS BUILT INTO ITS STRATEGIC PLAN.
2.			
3.			

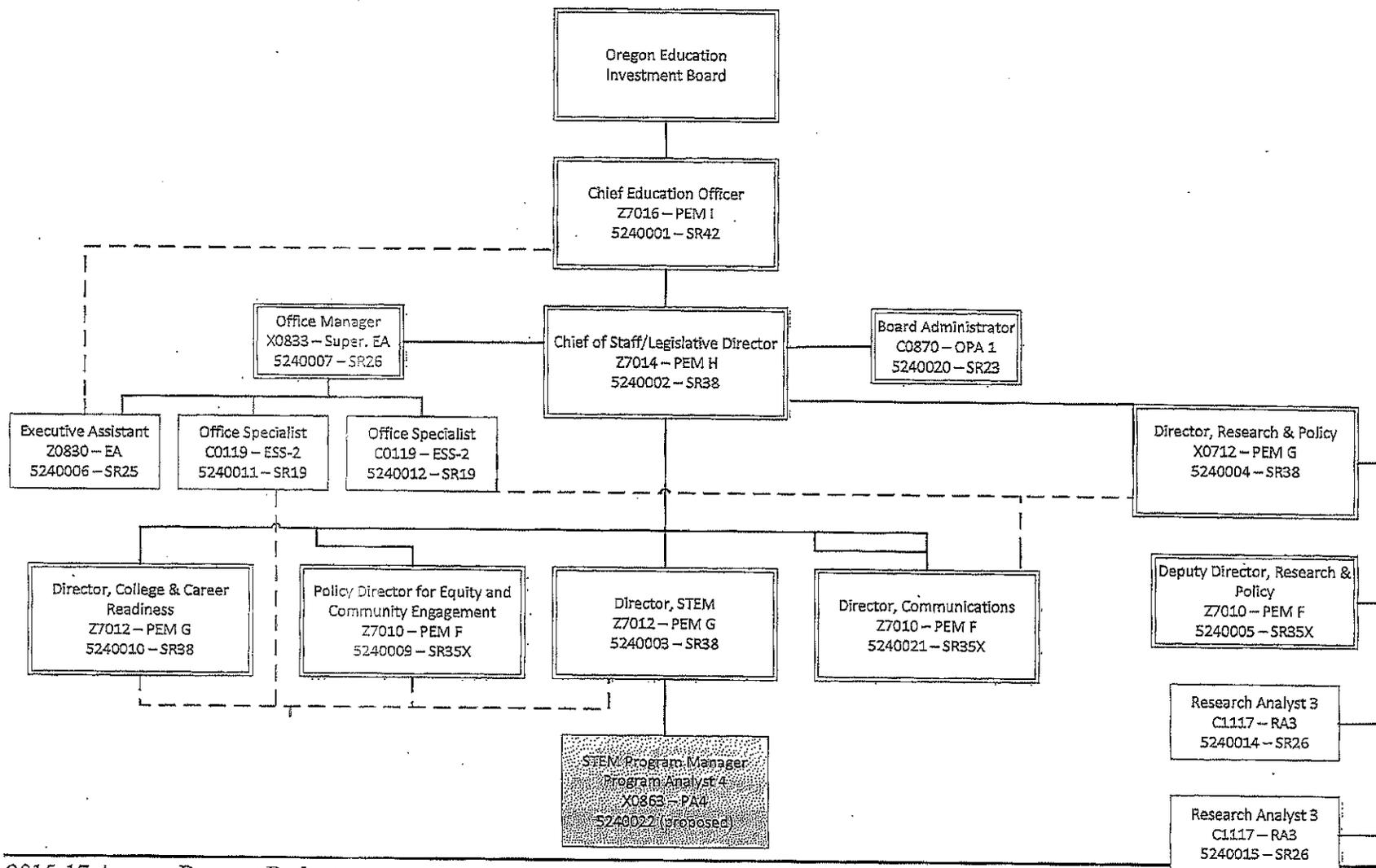
# BUDGET NARRATIVE

## Oregon Education Investment Board Organization Chart June 30, 2014



# BUDGET NARRATIVE

## Oregon Education Investment Board Organization Chart 2015-17



**Oregon Education Investment Board**

**Agency Number: 52400**

Agencywide Program Unit Summary  
2015-17 Biennium

Version: V - 01 - Agency Request Budget

<i>Summary Cross Reference Number</i>	<i>Cross Reference Description</i>	<i>2011-13 Actuals</i>	<i>2013-15 Leg Adopted Budget</i>	<i>2013-15 Leg Approved Budget</i>	<i>2015-17 Agency Request Budget</i>	<i>2015-17 Governor's Budget</i>	<i>2015-17 Leg Adopted Budget</i>
001-00-00-00000	Oregon Education Investment Board						
	General Fund	-	6,035,608	21,008,299	12,682,189	-	-
<b>TOTAL AGENCY</b>							
	General Fund	-	6,035,608	21,008,299	12,682,189	-	-

Agency Request  
2015-17 Biennium

Governor's Budget  
Page \_\_\_\_\_

Legislatively Adopted  
Agencywide Program Unit Summary - BPR010





# DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

Source	Fund	ORBITS Revenue Acct	2011-2013 Actual	2013-15 Legislatively Adopted	2013-15 Estimated	2015-17		
						Agency Request	Governor's	Legislatively Adopted
None								

Agency Request

Governor's Budget

Legislatively Adopted

Budget Page \_\_\_\_\_

# BUDGET NARRATIVE

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## Essential and Policy Package Narrative

### Policy Package 101 – Removal of OEIB Sunset

#### Package Description

In creating the OEIB through SB 909 in 2011, the Legislature included a sunset provision that removes the OEIB and position of Chief Education Officer as of March 15, 2016. With the support of the Governor, the OEIB will bring Legislation in the 2015 Session seeking to remove the sunset from OEIB. However, because the sunset is currently in law, the OEIB's base budget request is for only the first 8.5 months of the next biennium – July 1, 2015 – March 15, 2016. The continuing 15.5 months of the biennial budget – March 16, 2016 – June 30, 2017 – are contained in Policy Option Package 101, which is contingent upon the Legislature voting to remove the sunset provision.

### Policy Package 102 – Reconfiguration of ETIC Funding

#### Package Description

Since 1997, by Oregon Statute 351.663, the *Engineering and Technology Industry Council (ETIC)* has advised the Oregon State Board of Higher Education (SBHE) on the investment of a fund to meet the urgent engineering education needs of Oregon's high technology industry. The fund has been continuously renewed during legislative sessions since establishment, primarily due to the consistent advocacy of the industry members. ETIC consists of senior executives from high technology firms. The size of the council varies, but is currently at 15 voting members. Representatives from key industry associations and public universities are included as non-voting members.

In the 2013-15 biennium, the ETIC funds totaled \$29 million. The funds are invested in the following institutions: Oregon Health & Sciences University (OHSU), University of Oregon (UO), Oregon State University (OSU), Portland State University (PSU), Oregon Institute of Technology (Oregon Tech), Southern Oregon University (SOU), Eastern Oregon University (EOU), and Western Oregon University (WOU). The majority of the funding, approximately \$20 million, is currently invested in OSU and PSU, which have the largest engineering schools. Currently, the funds are broken down into 2 different types of investments: (1) "Sustaining" funds, which are allocated to the institutions for the purpose of sustaining engineering programs; and (2) "Innovative" funds, which are awarded to the institutions on the basis of an Request for Proposal process.

## BUDGET NARRATIVE

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In 2014, through HB 4020, the Legislature moved ETIC funding and oversight from the Oregon University System to the OEIB, effective July 1, 2014. This mid-biennium transfer was viewed as important for several reasons: (1) the OEIB's mission of using investment in education to produce outcomes is aligned with ETIC's goals; (2) the STEM Council, created through HB 2636 (2013) which is currently overseen by OEIB, is charged with overseeing a comprehensive plan for STEM investments; and (3) OEIB was seen as a temporary "safe harbor" in order to buy some time to discuss the future of ETIC.

The Governor's office has approved drafting of a legislative concept to be advanced by OEIB that will dissolve ETIC, in order to allow the STEM Council to advance the needs of the engineering and technical industries in the context of a large state plan for improving STEM (science, technology, engineering and math) outcomes. This Policy Option Package does the following: (1) transfers \$24,451,274 (approximately 80% of the current service level for the ETIC fund) to the Higher Education Coordinating Commission (HECC), to be included in the support fund for Oregon's public universities and allocated pursuant to an allocation model HECC develops and approves; and (2) adds one additional staff member to support administration of the \$6,112,818 (approximately 20% of the current service level for the ETIC Funds). The STEM Program Manager (Program Analyst 4) will work under the direction of the OEIB Director of STEM to administer the remaining distribution of the ETIC funds.



technical education. Works with both internal and external STEM related project groups and facilitates the distribution of funds through the Oregon Department of Education designated for this purpose.

### SECTION 3: DESCRIPTION OF DUTIES

List the major duties of the position. State the percentage of time for each duty. Mark "N" for new duties, "R" for revised duties or "NC" for no change in duties. Indicate whether the duty is an "Essential" (E) or "Non-Essential" (NE) function.

% of Time	N/R/NC	E/NE	DUTIES
45%	N	E	<p><b>Overall Program Design and Instructional Practice</b></p> <ul style="list-style-type: none"> <li>• Provide liaison and technical assistance service in the areas of STEM and STEAM.</li> <li>• Coordinate with Community Colleges and Workforce Development, universities and private colleges to support STEM programs and hubs.</li> <li>• Contribute to the implementation of professional development and information services related to STEM.</li> <li>• Coordinate with ODE staff on activities and programs related to STEM.</li> <li>• Evaluate curriculum and/or program designs and prepare oral and written reports summarizing those reports and promising practices.</li> <li>• Research and report on special topics as assigned</li> <li>• Help promote equitable practices and opportunities</li> <li>• Conduct site visits and provide technical assistance and support for funded and developing programs.</li> </ul>
45%	N	E	<p><b>Specific Program Design and Instruction Practice</b></p> <ul style="list-style-type: none"> <li>• Provide leadership to integrate programs, projects and strategies in the areas of STEM, career and technical education, and workforce needs.</li> <li>• Research issues and questions; provide leadership and technical assistance to school districts, community colleges and business and industry partners on STEM and career and technical education opportunities.</li> <li>• Coordinate with private industry, Oregon Workforce Investment Boards, Community Colleges, Workforce Development and 4-year universities for alignment of education and workforce system.</li> </ul>
10%	N	E	<p><b>Other Duties as Assigned</b></p> <ul style="list-style-type: none"> <li>• Develop Department documents for public use</li> <li>• Analyze and evaluate data, policies, and procedures to identify potential impact and recommend a course of action</li> <li>• Policy research and development</li> <li>• Serve as a representative on committees and work groups (internal and external) for Chief Education Officer / OEIB</li> </ul>
100%			

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**SECTION 4. WORKING CONDITIONS**

Describe any on-going working conditions. Include any physical, sensory, and environmental demands. State the frequency of exposure to these conditions.

This position requires a flexible work schedule that may involve occasional statewide travel. Required travel may include evenings, weekends, and overnight stays. You must have a valid driver's license and a good driving record. If not, you must be able to provide an acceptable alternate method of transportation.

**SECTION 5. GUIDELINES**

a. List any established guidelines used in this position, such as state or federal laws or regulations, policies, manuals, or desk procedures.

- State Constitution
- Oregon Revised Statutes
- Federal Laws
- Administrative Rules
- Division Policies and Operating Procedures
- Statewide Policies and Procedures
- Public Records Laws

b. How are these guidelines used?

- Rules and policies guide agency actions
- Industry publications inform of court decisions, trends and practices of the profession

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**SECTION 6. WORK CONTACTS**

With whom, outside of co-workers in this work unit, must the employee in this position regularly come in contact?

Who Contacted	How	Purpose	How Often?
<i>Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".</i>			
Local education agency representatives and federal representatives	Telephone, e-mail, videoconferences, web pages, letters, meetings	Provide leadership support to develop/implement accountability, and coherency throughout the P16 (pre-kindergarten through grade 16) educational system	Daily
Community College Career and Technical Education Instructors/Deans	Telephone, e-mail, videoconferences, web pages, letters, meetings	Provide state leadership and technical assistance	Weekly
Secondary District Administrators & Curriculum Directors	Telephone, e-mail, videoconferences, web pages, letters, meetings	Provide state leadership and technical assistance	Weekly
Community College Administrators			Weekly
Secondary Career and Technical Education and Academic Instructors	Telephone, e-mail, videoconferences, web pages, letters, meetings	Provide state leadership and technical assistance	Weekly



Disciplines and rewards

Prepares & signs performance evaluations

**SECTION 10. ADDITIONAL POSITION-RELATED INFORMATION**

ADDITIONAL REQUIREMENTS: List any knowledge and skills needed at time of hire that are not already required in the classification specification:

BUDGET AUTHORITY: If this position has authority to commit agency operating money, indicate the following:

Operating Area	Biennial Amount (\$00000.00)	Fund Type
<i>Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".</i>		

**SECTION 11. ORGANIZATIONAL CHART**

Attach a current organizational chart. Be sure the following information is shown on the chart for each position: , classification title, classification number, salary range, employee name and position number.

**SECTION 12. SIGNATURES**

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Appointing Authority Signature

\_\_\_\_\_  
Date

Page 5

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Oregon Education Investment Board  
 Pkg: 010 - Non-PICS Psnl Svc / Vacancy Factor

Cross Reference Name: Oregon Education Investment Board  
 Cross Reference Number: 52400-001-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	15,232	-	-	-	-	-	15,232
<b>Total Revenues</b>	<b>\$15,232</b>	-	-	-	-	-	<b>\$15,232</b>
<b>Personal Services</b>							
All Other Differential	8,637	-	-	-	-	-	8,637
Public Employees' Retire Cont	1,364	-	-	-	-	-	1,364
Pension Obligation Bond	6,869	-	-	-	-	-	6,869
Social Security Taxes	661	-	-	-	-	-	661
Mass Transit Tax	(2,299)	-	-	-	-	-	(2,299)
<b>Total Personal Services</b>	<b>\$15,232</b>	-	-	-	-	-	<b>\$15,232</b>
<b>Total Expenditures</b>							
Total Expenditures	15,232	-	-	-	-	-	15,232
<b>Total Expenditures</b>	<b>\$15,232</b>	-	-	-	-	-	<b>\$15,232</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-

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Legislatively Adopted  
 Essential and Policy Package Fiscal Impact Summary - BPR013

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Oregon Education Investment Board  
Pkg: 021 - Phase-in

Cross Reference Name: Oregon Education Investment Board  
Cross Reference Number: 52400-001-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	15,820,210	-	-	-	-	-	15,820,210
<b>Total Revenues</b>	<b>\$15,820,210</b>	-	-	-	-	-	<b>\$15,820,210</b>
<b>Services &amp; Supplies</b>							
Attorney General	18,000	-	-	-	-	-	18,000
Facilities Rental and Taxes	43,839	-	-	-	-	-	43,839
<b>Total Services &amp; Supplies</b>	<b>\$61,839</b>	-	-	-	-	-	<b>\$61,839</b>
<b>Special Payments</b>							
Other Special Payments	15,758,371	-	-	-	-	-	15,758,371
<b>Total Special Payments</b>	<b>\$15,758,371</b>	-	-	-	-	-	<b>\$15,758,371</b>
<b>Total Expenditures</b>							
Total Expenditures	15,820,210	-	-	-	-	-	15,820,210
<b>Total Expenditures</b>	<b>\$15,820,210</b>	-	-	-	-	-	<b>\$15,820,210</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-

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Essential and Policy Package Fiscal Impact Summary - BPR013

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Oregon Education Investment Board  
 Pkg: 031 - Standard Inflation

Cross Reference Name: Oregon Education Investment Board  
 Cross Reference Number: 52400-001-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	68,901	-	-	-	-	-	68,901
<b>Total Revenues</b>	<b>\$68,901</b>	-	-	-	-	-	<b>\$68,901</b>
<b>Services &amp; Supplies</b>							
Instate Travel	2,325	-	-	-	-	-	2,325
Employee Training	530	-	-	-	-	-	530
Office Expenses	750	-	-	-	-	-	750
Telecommunications	1,134	-	-	-	-	-	1,134
State Gov. Service Charges	10,550	-	-	-	-	-	10,550
Data Processing	2,621	-	-	-	-	-	2,621
Publicity and Publications	1,425	-	-	-	-	-	1,425
Professional Services	41,220	-	-	-	-	-	41,220
Employee Recruitment and Develop	135	-	-	-	-	-	135
Dues and Subscriptions	171	-	-	-	-	-	171
Facilities Rental and Taxes	1,924	-	-	-	-	-	1,924
Other Services and Supplies	5,268	-	-	-	-	-	5,268
Expendable Prop 250 - 5000	240	-	-	-	-	-	240
IT Expendable Property	608	-	-	-	-	-	608
<b>Total Services &amp; Supplies</b>	<b>\$68,901</b>	-	-	-	-	-	<b>\$68,901</b>
<b>Total Expenditures</b>							
Total Expenditures	68,901	-	-	-	-	-	68,901
<b>Total Expenditures</b>	<b>\$68,901</b>	-	-	-	-	-	<b>\$68,901</b>

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 Essential and Policy Package Fiscal Impact Summary - BPR013

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Oregon Education Investment Board  
 Pkg: 031 - Standard Inflation

Cross Reference Name: Oregon Education Investment Board  
 Cross Reference Number: 52400-001-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Ending Balance							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-

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Legislatively Adopted  
 Essential and Policy Package Fiscal Impact Summary - BPR013

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Oregon Education Investment Board  
 Pkg: 032 - Above Standard Inflation

Cross Reference Name: Oregon Education Investment Board  
 Cross Reference Number: 52400-001-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	1,079	-	-	-	-	-	1,079
<b>Total Revenues</b>	<b>\$1,079</b>	-	-	-	-	-	<b>\$1,079</b>
<b>Services &amp; Supplies</b>							
Professional Services	412	-	-	-	-	-	412
Facilities Rental and Taxes	667	-	-	-	-	-	667
<b>Total Services &amp; Supplies</b>	<b>\$1,079</b>	-	-	-	-	-	<b>\$1,079</b>
<b>Total Expenditures</b>							
Total Expenditures	1,079	-	-	-	-	-	1,079
<b>Total Expenditures</b>	<b>\$1,079</b>	-	-	-	-	-	<b>\$1,079</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Oregon Education Investment Board  
 Pkg: 060 - Technical Adjustments

Cross Reference Name: Oregon Education Investment Board  
 Cross Reference Number: 52400-001-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	(24,003,514)	-	-	-	-	-	(24,003,514)
<b>Total Revenues</b>	<b>(\$24,003,514)</b>	-	-	-	-	-	<b>(\$24,003,514)</b>
<b>Personal Services</b>							
Class/Unclass Sal. and Per Diem	(1,686,210)	-	-	-	-	-	(1,686,210)
All Other Differential	(191,566)	-	-	-	-	-	(191,566)
Public Employees' Retire Cont	(296,501)	-	-	-	-	-	(296,501)
Pension Obligation Bond	(116,505)	-	-	-	-	-	(116,505)
Social Security Taxes	(136,651)	-	-	-	-	-	(136,651)
Mass Transit Tax	(11,281)	-	-	-	-	-	(11,281)
Flexible Benefits	(457,920)	-	-	-	-	-	(457,920)
<b>Total Personal Services</b>	<b>(\$2,896,634)</b>	-	-	-	-	-	<b>(\$2,896,634)</b>
<b>Services &amp; Supplies</b>							
Instate Travel	(51,567)	-	-	-	-	-	(51,567)
Employee Training	(11,749)	-	-	-	-	-	(11,749)
Office Expenses	(16,635)	-	-	-	-	-	(16,635)
Telecommunications	(25,161)	-	-	-	-	-	(25,161)
State Gov. Service Charges	(27,617)	-	-	-	-	-	(27,617)
Data Processing	(58,140)	-	-	-	-	-	(58,140)
Publicity and Publications	(31,606)	-	-	-	-	-	(31,606)
Professional Services	(914,498)	-	-	-	-	-	(914,498)
Attorney General	(11,628)	-	-	-	-	-	(11,628)
Employee Recruitment and Develop	(2,994)	-	-	-	-	-	(2,994)

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**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Oregon Education Investment Board  
Pkg: 060 - Technical Adjustments

Cross Reference Name: Oregon Education Investment Board  
Cross Reference Number: 52400-001-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Services &amp; Supplies</b>							
Dues and Subscriptions	(3,791)	-	-	-	-	-	(3,791)
Facilities Rental and Taxes	(71,431)	-	-	-	-	-	(71,431)
Other Services and Supplies	(116,850)	-	-	-	-	-	(116,850)
Expendable Prop 250 - 5000	(5,323)	-	-	-	-	-	(5,323)
IT Expendable Property	(13,486)	-	-	-	-	-	(13,486)
<b>Total Services &amp; Supplies</b>	<b>(\$1,362,476)</b>	-	-	-	-	-	<b>(\$1,362,476)</b>
<b>Special Payments</b>							
Other Special Payments	(19,744,404)	-	-	-	-	-	(19,744,404)
<b>Total Special Payments</b>	<b>(\$19,744,404)</b>	-	-	-	-	-	<b>(\$19,744,404)</b>
<b>Total Expenditures</b>							
Total Expenditures	(24,003,514)	-	-	-	-	-	(24,003,514)
<b>Total Expenditures</b>	<b>(\$24,003,514)</b>	-	-	-	-	-	<b>(\$24,003,514)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-
<b>Total FTE</b>							
Total FTE							(9.75)
<b>Total FTE</b>							<b>(9.75)</b>

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Essential and Policy Package Fiscal Impact Summary - BPR013

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Oregon Education Investment Board  
 Pkg: 101 - Removal of OEIB sunset

Cross Reference Name: Oregon Education Investment Board  
 Cross Reference Number: 52400-001-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	24,003,513	-	-	-	-	-	24,003,513
<b>Total Revenues</b>	<b>\$24,003,513</b>	-	-	-	-	-	<b>\$24,003,513</b>
<b>Personal Services</b>							
All Other Differential	191,565	-	-	-	-	-	191,565
Public Employees' Retire Cont	30,248	-	-	-	-	-	30,248
Social Security Taxes	14,655	-	-	-	-	-	14,655
Mass Transit Tax	11,281	-	-	-	-	-	11,281
Other OPE	2,648,884	-	-	-	-	-	2,648,884
<b>Total Personal Services</b>	<b>\$2,896,633</b>	-	-	-	-	-	<b>\$2,896,633</b>
<b>Services &amp; Supplies</b>							
Instate Travel	51,567	-	-	-	-	-	51,567
Employee Training	11,749	-	-	-	-	-	11,749
Office Expenses	16,635	-	-	-	-	-	16,635
Telecommunications	25,161	-	-	-	-	-	25,161
State Gov. Service Charges	27,617	-	-	-	-	-	27,617
Data Processing	58,140	-	-	-	-	-	58,140
Publicity and Publications	31,606	-	-	-	-	-	31,606
Professional Services	914,498	-	-	-	-	-	914,498
Attorney General	11,628	-	-	-	-	-	11,628
Employee Recruitment and Develop	2,994	-	-	-	-	-	2,994
Dues and Subscriptions	3,791	-	-	-	-	-	3,791
Facilities Rental and Taxes	71,431	-	-	-	-	-	71,431

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 Essential and Policy Package Fiscal Impact Summary - BPR013

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Oregon Education Investment Board  
Pkg: 101 - Removal of OEIB sunset

Cross Reference Name: Oregon Education Investment Board  
Cross Reference Number: 52400-001-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	24,003,513	-	-	-	-	-	24,003,513
<b>Total Revenues</b>	<b>\$24,003,513</b>	-	-	-	-	-	<b>\$24,003,513</b>
<b>Personal Services</b>							
All Other Differential	191,565	-	-	-	-	-	191,565
Public Employees' Retire Cont	30,248	-	-	-	-	-	30,248
Social Security Taxes	14,655	-	-	-	-	-	14,655
Mass Transit Tax	11,281	-	-	-	-	-	11,281
Other OPE	2,648,884	-	-	-	-	-	2,648,884
<b>Total Personal Services</b>	<b>\$2,896,633</b>	-	-	-	-	-	<b>\$2,896,633</b>
<b>Services &amp; Supplies</b>							
Instate Travel	51,567	-	-	-	-	-	51,567
Employee Training	11,749	-	-	-	-	-	11,749
Office Expenses	16,635	-	-	-	-	-	16,635
Telecommunications	25,161	-	-	-	-	-	25,161
State Gov. Service Charges	27,617	-	-	-	-	-	27,617
Data Processing	58,140	-	-	-	-	-	58,140
Publicity and Publications	31,606	-	-	-	-	-	31,606
Professional Services	914,498	-	-	-	-	-	914,498
Attorney General	11,628	-	-	-	-	-	11,628
Employee Recruitment and Develop	2,994	-	-	-	-	-	2,994
Dues and Subscriptions	3,791	-	-	-	-	-	3,791
Facilities Rental and Taxes	71,431	-	-	-	-	-	71,431

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**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Oregon Education Investment Board  
Pkg: 101 - Removal of OEIB sunset

Cross Reference Name: Oregon Education Investment Board  
Cross Reference Number: 52400-001-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Services &amp; Supplies</b>							
Other Services and Supplies	116,850	-	-	-	-	-	116,850
Expendable Prop 250 - 5000	5,323	-	-	-	-	-	5,323
IT Expendable Property	13,486	-	-	-	-	-	13,486
<b>Total Services &amp; Supplies</b>	<b>\$1,362,476</b>	-	-	-	-	-	<b>\$1,362,476</b>
<b>Special Payments</b>							
Other Special Payments	19,744,404	-	-	-	-	-	19,744,404
<b>Total Special Payments</b>	<b>\$19,744,404</b>	-	-	-	-	-	<b>\$19,744,404</b>
<b>Total Expenditures</b>							
Total Expenditures	24,003,513	-	-	-	-	-	24,003,513
<b>Total Expenditures</b>	<b>\$24,003,513</b>	-	-	-	-	-	<b>\$24,003,513</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-
<b>Total FTE</b>							
Total FTE							9.75
<b>Total FTE</b>	-	-	-	-	-	-	<b>9.75</b>

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**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Oregon Education Investment Board  
 Pkg: 102 - Reconfiguration of ETIC funding

Cross Reference Name: Oregon Education Investment Board  
 Cross Reference Number: 52400-001-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	(24,233,677)	-	-	-	-	-	(24,233,677)
<b>Total Revenues</b>	<b>(\$24,233,677)</b>	-	-	-	-	-	<b>(\$24,233,677)</b>
<b>Personal Services</b>							
Class/Unclass Sal. and Per Diem	131,808	-	-	-	-	-	131,808
Empi. Rel. Bd. Assessments	44	-	-	-	-	-	44
Public Employees' Retire Cont	20,813	-	-	-	-	-	20,813
Social Security Taxes	10,083	-	-	-	-	-	10,083
Worker's Comp. Assess. (WCD)	69	-	-	-	-	-	69
Mass Transit Tax	791	-	-	-	-	-	791
Flexible Benefits	30,528	-	-	-	-	-	30,528
<b>Total Personal Services</b>	<b>\$194,136</b>	-	-	-	-	-	<b>\$194,136</b>
<b>Services &amp; Supplies</b>							
Instate Travel	691	-	-	-	-	-	691
Employee Training	3,583	-	-	-	-	-	3,583
Office Expenses	2,048	-	-	-	-	-	2,048
Telecommunications	1,536	-	-	-	-	-	1,536
State Gov. Service Charges	3,251	-	-	-	-	-	3,251
Data Processing	666	-	-	-	-	-	666
Publicity and Publications	512	-	-	-	-	-	512
Employee Recruitment and Develop	410	-	-	-	-	-	410
Dues and Subscriptions	512	-	-	-	-	-	512
Facilities Rental and Taxes	7,282	-	-	-	-	-	7,282

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 Essential and Policy Package Fiscal Impact Summary - BPR013

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Oregon Education Investment Board  
 Pkg: 102 - Reconfiguration of ETIC funding

Cross Reference Name: Oregon Education Investment Board  
 Cross Reference Number: 52400-001-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Services &amp; Supplies</b>							
Other Services and Supplies	512	-	-	-	-	-	512
Expendable Prop 250 - 5000	2,458	-	-	-	-	-	2,458
<b>Total Services &amp; Supplies</b>	<b>\$23,461</b>	-	-	-	-	-	<b>\$23,461</b>
<b>Special Payments</b>							
Other Special Payments	(24,451,274)	-	-	-	-	-	(24,451,274)
<b>Total Special Payments</b>	<b>(\$24,451,274)</b>	-	-	-	-	-	<b>(\$24,451,274)</b>
<b>Total Expenditures</b>							
Total Expenditures	(24,233,677)	-	-	-	-	-	(24,233,677)
<b>Total Expenditures</b>	<b>(\$24,233,677)</b>	-	-	-	-	-	<b>(\$24,233,677)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-
<b>Total Positions</b>							
Total Positions	-	-	-	-	-	-	1
<b>Total Positions</b>	-	-	-	-	-	-	<b>1</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Oregon Education Investment Board  
 Pkg: 102 - Reconfiguration of ETIC funding

Cross Reference Name: Oregon Education Investment Board  
 Cross Reference Number: 52400-001-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Total FTE							
Total FTE							1.00
<b>Total FTE</b>							<b>1.00</b>

07/30/14 REPORT NO.: PPDPFISCAL  
 REPORT: PACKAGE FISCAL IMPACT REPORT  
 AGENCY:52400 OREGON EDUCATION INVESTMENT BD  
 SUMMARY XREF:001-00-00 Oregon Education Investment Bd

DEPT. OF ADMIN. SVCS. -- PPDB FICS SYSTEM

PACKAGE: 060 - Technical Adjustments

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 PICS SYSTEM: BUDGET PREPARATION

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POSITION NUMBER	CLASS COMP	CLASS NAME	POS CNT	FTE	MOS	STEP	RATE	GF SAL/OPE	OF SAL/OPE	FF SAL/OPE	LF SAL/OPE	AF SAL/OPE
5240001	MEAHZ7016 HA	PRINCIPAL EXECUTIVE/MANAGER I	1-	1.00-	24.00-	09	13,348.00	320,352- 100,411-				320,352- 100,411-
5240001	MEAHZ7016 HA	PRINCIPAL EXECUTIVE/MANAGER I	1	.35	8.50	09	13,348.00	113,458 26,708				113,458 26,708
5240002	MESNZ7014 AA	PRINCIPAL EXECUTIVE/MANAGER H	1-	1.00-	24.00-	09	11,362.00	272,688- 92,884-				272,688- 92,884-
5240002	MESNZ7014 AA	PRINCIPAL EXECUTIVE/MANAGER H	1	.35	8.50	09	11,362.00	96,577 22,751				96,577 22,751
5240003	MENNZ7012 AA	PRINCIPAL EXECUTIVE/MANAGER G	1-	1.00-	24.00-	09	10,306.00	247,344- 88,619-				247,344- 88,619-
5240003	MENNZ7012 AA	PRINCIPAL EXECUTIVE/MANAGER G	1	.35	8.50	09	10,306.00	87,601 20,647				87,601 20,647
5240004	MMS X7012 AA	PRINCIPAL EXECUTIVE/MANAGER G	1-	1.00-	24.00-	09	10,306.00	247,344- 88,619-				247,344- 88,619-
5240004	MMS X7012 AA	PRINCIPAL EXECUTIVE/MANAGER G	1	.35	8.50	09	10,306.00	87,601 20,647				87,601 20,647
5240005	MENNZ7010 AA	PRINCIPAL EXECUTIVE/MANAGER F	1-	1.00-	24.00-	06	7,701.00	184,824- 73,964-				184,824- 73,964-
5240005	MENNZ7010 AA	PRINCIPAL EXECUTIVE/MANAGER F	1	.35	8.50	06	7,701.00	65,459 15,457				65,459 15,457
5240006	MENNZ0830 AA	EXECUTIVE ASSISTANT	1-	1.00-	24.00-	03	4,305.00	103,320- 54,859-				103,320- 54,859-
5240006	MENNZ0830 AA	EXECUTIVE ASSISTANT	1	.35	8.50	03	4,305.00	36,593 8,690				36,593 8,690
5240007	MMS X0833 AA	SUPV EXECUTIVE ASSISTANT	1-	1.00-	24.00-	08	5,764.00	138,336- 63,067-				138,336- 63,067-
5240007	MMS X0833 AA	SUPV EXECUTIVE ASSISTANT	1	.35	8.50	08	5,764.00	48,994 11,597				48,994 11,597
5240009	MENNZ7010 AA	PRINCIPAL EXECUTIVE/MANAGER F	1-	1.00-	24.00-	07	8,087.00	194,088- 76,136-				194,088- 76,136-
5240009	MENNZ7010 AA	PRINCIPAL EXECUTIVE/MANAGER F	1	.35	8.50	07	8,087.00	68,740 16,226				68,740 16,226

07/30/14 REPORT NO.: PDEFISCAL  
 REPORT: PACKAGE FISCAL IMPACT REPORT  
 AGENCY:52400 OREGON EDUCATION INVESTMENT BD  
 SUMMARY XREF:001-00-00 Oregon Education Investment Bo

DEPT. OF ADMIN. SVCS. -- PDEB PICS SYSTEM

2015-17  
 PICS SYSTEM: BUDGET PREPARATION

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 PROD FILE

PACKAGE: 060 - Technical Adjustments

POSITION NUMBER	CLASS COMP	CLASS NAME	POS CNT	FTE	MOS	STEP	RATE	GF SAL/OPE	OF SAL/OPE	FF SAL/OPE	LF SAL/OPE	AF SAL/OPE
5240010	MENNZ7012	AA PRINCIPAL EXECUTIVE/MANAGER G	1-	1.00-	24.00-	09	10,306.00	247,344- 88,619-				247,344- 88,619-
5240010	MENNZ7012	AA PRINCIPAL EXECUTIVE/MANAGER G	1	.35	8.50	09	10,306.00	87,601 20,647				87,601 20,647
5240011	UA C0119	AA EXECUTIVE SUPPORT SPECIALIST 2	1-	1.00-	24.00-	03	2,999.00	71,976- 47,512-				71,976- 47,512-
5240011	UA C0119	AA EXECUTIVE SUPPORT SPECIALIST 2	1	.35	8.50	03	2,999.00	25,492 6,088				25,492 6,088
5240012	UA C0119	AA EXECUTIVE SUPPORT SPECIALIST 2	1-	1.00-	24.00-	05	3,291.00	78,984- 49,155-				78,984- 49,155-
5240012	UA C0119	AA EXECUTIVE SUPPORT SPECIALIST 2	1	.35	8.50	05	3,291.00	27,974 6,670				27,974 6,670
5240014	UA C1117	AA RESEARCH ANALYST 3	1-	1.00-	24.00-	02	3,973.00	95,352- 52,991-				95,352- 52,991-
5240014	UA C1117	AA RESEARCH ANALYST 3	1	.35	8.50	02	3,973.00	33,771 8,030				33,771 8,030
5240015	UA C1117	AA RESEARCH ANALYST 3	1-	1.00-	24.00-	02	3,973.00	95,352- 52,991-				95,352- 52,991-
5240015	UA C1117	AA RESEARCH ANALYST 3	1	.35	8.50	02	3,973.00	33,771 8,030				33,771 8,030
5240020	UA C0870	AA OPERATIONS & POLICY ANALYST 1	1-	1.00-	24.00-	08	4,571.00	109,704- 56,355-				109,704- 56,355-
5240020	UA C0870	AA OPERATIONS & POLICY ANALYST 1	1	.35	8.50	08	4,571.00	38,854 9,220				38,854 9,220
5240021	MENNZ7010	AA PRINCIPAL EXECUTIVE/MANAGER F	1-	1.00-	24.00-	08	8,496.00	203,904- 78,436-				203,904- 78,436-
5240021	MENNZ7010	AA PRINCIPAL EXECUTIVE/MANAGER F	1	.35	8.50	08	8,496.00	72,216 17,041				72,216 17,041
TOTAL PICS SALARY								1,686,210-				1,686,210-
TOTAL PICS OPE								846,169-				846,169-
TOTAL PICS PERSONAL SERVICES =				9.75-	232.50-			2,532,379-				2,532,379-

07/30/14 REPORT NO.: PPDEFISCAL  
 REPORT: PACKAGE FISCAL IMPACT REPORT  
 AGENCY:52400 OREGON EDUCATION INVESTMENT BD  
 SUMMARY XREF:001-00-00 Oregon Education Investment Bo

DEPT. OF ADMIN. SVCS. -- PPDE PICS SYSTEM

2015-17  
 PICS SYSTEM: BUDGET PREPARATION  
 PAGE 3  
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PACKAGE: 102 - Reconfiguration of ETIC fundin

POSITION		POS					GF	OF	FF	LF	AF
NUMBER	CLASS COMP	CNT	FTE	MOS	STEP	RATE	SAL/OPE	SAL/OPE	SAL/OPE	SAL/OPE	SAL/OPE
5240022	MMN X0863 AA PROGRAM ANALYST 4	1	1.00	24.00	02	5,492.00	131,808 61,537				131,808 61,537
TOTAL PICS SALARY							131,808				131,808
TOTAL PICS OPE							61,537				61,537
TOTAL PICS PERSONAL SERVICES =		1	1.00	24.00			193,345				193,345

# DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

Source	Fund	ORBITS Revenue Acct	2011-2013 Actual	2013-15 Legislatively Adopted	2013-15 Estimated	2015-17		
						Agency Request	Governor's	Legislatively Adopted

Agency Request

Governor's Budget

Legislatively Adopted

Budget Page \_\_\_\_\_



**DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE**

Oregon Education Investment Board  
2015-17 Biennium

Agency Number: 52400

Source	2011-13 Actuals	2013-15 Leg Adopted Budget	2013-15 Leg Approved Budget	2015-17 Agency Request Budget	2015-17 Governor's Budget	2015-17 Leg Adopted Budget
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No Records Available

# DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

Source	Fund	ORBITS Revenue Acct	2011-2013 Actual	2013-15 Legislatively Adopted	2013-15 Estimated	2015-17		
						Agency Request	Governor's	Legislatively Adopted

Agency Request

Governor's Budget

Legislatively Adopted

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## BUDGET NARRATIVE

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### Special Reports

1. Information Technology-related Projects/Initiatives in 2015-17  
None.
2. Annual Performance Progress Report  
None.
3. Audit Response Report  
None.

# BUDGET NARRATIVE

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## Affirmative Action Statement

### Introduction:

The Oregon Education Investment Board developed and submitted their first Affirmative Action Plan on August 29, 2014 to act upon its value for workplace diversity, respect, and equal employment opportunities to include women, people of color, and persons with disabilities.

### 2015-2017 Analysis and Goals

#### Summary:

OEIB was well-represented in all job categories during the 2013-2015 period. Overall, the organization achieved and maintained a diverse workforce. OEIB has some under representation of unprotected classes and certain job titles. Overall OEIB is maintaining parity with State Diversity percentages.

### 2011-2013 Development & Implementation of Programs (Action Plan)

Volunteer Internship Opportunities: OEIB provides voluntary opportunities within its Agency. The purpose is to ensure there is a place for translating theory into practice.

### Diversity Outreach

Community Outreach: OEIB works directly with DAS to distributed job announcements to individual organizations and trade groups as well as through network channels of the Governor's Office on Diversity and Inclusion. DAS maintains contact with community organizations through staff attendance at group meetings and conferences and staff actively seek opportunities to meet personally with officials representing such organizations and community partners such as:

- ❖ Oregon Hispanic Employees Network
- ❖ Oregon Association of Minority Entrepreneurs
- ❖ NAACP Salem-Keizer Chapter
- ❖ Oregon Native American Chamber
- ❖ Hispanic Services Roundtable

## BUDGET NARRATIVE

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- ❖ Oregon Advocacy Commission
- ❖ APACC (Asian Pacific American Chamber of Commerce)
- ❖ Say Hey, NW
- ❖ Breakfast for Champions
- ❖ Statewide Affirmative Action Monthly Workshop
- ❖ DAS Diversity Council
- ❖ Monthly Statewide Recruiters Meeting
- ❖ Statewide Diversity Conference
- ❖ Ethnic Cultural Events
- ❖ Veterans Events

College/University Career/Job Fairs: OEIB is a new agency and these types of outreach events have not been established. A recruitment outreach strategy is under development.

Annual Diversity Conference: OEIB had some employees attend the Annual Diversity Conference in 2013. This Conference provided an opportunity to attend a variety of proactive workshops dedicated to discussing topics related to diversity such as Religion in the Workplace, Conversations on Race, Emotional/Cultural Intelligence, and Compassionate Communication.

New Employee Orientation: New Employee Orientation covers Affirmative Action and diversity topics. All employees receive a copy of the Workforce Diversity and Cultural Competency policy which is discussed at the orientation.

### **Recruitment/Selection**

Order of Recruitment Lists: In order to promote a diverse applicant pool, job vacancy recruitments are generally conducted on an open competitive basis. The Agency attracts applicants from inside and outside the State system.

Position Descriptions: Position Descriptions include standards for reflecting sensitivity and respect for diverse cultures and performance appraisals include performance requirements in promoting and fostering a diverse and discrimination/harassment-free workplace.

Interview Panels: Hiring managers will make every reasonable effort to ensure that interview panels include women and/or people of color. In order to promote neutrality in the selection of supervisory, management, and executive service positions, the panel should include at least one member from outside the functional unit or the division.

# BUDGET NARRATIVE

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## Advertising

Advertisements: Oregon State government has a current advertising broker contract with Bernard Hodes Group for advertising services related to job announcements. Bernard Hodes offers the SmartPost Job Distribution System. SmartPost has the ability to post jobs to thousands of job boards and includes a recommendation on which sites to utilize for a specific classification or audience. Announcements were also sent to Community Newsletters, Minority Newspapers and Periodicals such as Asian Reporter, Skanner, and Portland Observer. This is achieved by networking with the Governor's Office on Diversity and Inclusion who sends out job announcements to their associates.

## Affirmative Action Policy Statement:

OEIB is committed to establishing and maintaining a diverse workforce, reflective of the diverse population within the State of Oregon. OEIB is committed to an affirmative action program that provides equal opportunities for all persons regardless of race, color, religion, sex, sexual orientation, national origin, marital status, age, or disability.

It is also the policy of OEIB to provide an environment for each applicant and employees that is free from sexual harassment, as well as harassment and intimidation on account of an individual's race, color, religion, gender, sexual orientation, national origin, age, or disability.

OEIB is an equal-opportunity employer that is committed to a pro-active role in the recruitment and selection process. OEIB will use diverse recruitment strategies to identify and attract candidates, and establish interview panels that represent protected-class groups.

OEIB will not discriminate, nor tolerate discrimination, against any applicant employee because of physical or mental disability in regard to any position for which the known applicant for employment is qualified.

OEIB agrees to take affirmative action to employ, advance in employment, and otherwise treat known qualified individuals with disabilities without regard to their physical or mental disabilities in all human resources selection and decision practices, such as: advertising, benefits, compensation, discipline (including probation, suspension, and /or termination for cause or layoff) recreational programs, and training, OEIB will also continue to administer these practices without regard to race, color, religion, gender, sexual orientation, national origin, age, or disability.

Additionally, all applicants and employees are protected from coercion, intimidation, interference, or discrimination for filing a complaint or assisting in an investigation under this policy.

## BUDGET NARRATIVE

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OEIB will not discriminate or tolerate discrimination, against any employee because they are a member of, apply to be a member of, perform, has performed, applied to perform or have an obligation to perform service in a uniformed service.

The Reasonable Accommodation Policy is consistent with the Americans with Disabilities Act of 1991.

**Oregon Education Investment Board**

Summary Cross Reference Listing and Packages  
2015-17 Biennium

Agency Number: 52400  
BAM Analyst: McGee, Bill  
Budget Coordinator: Heinrichs, Valerie - (503)373-0743

<i>Cross Reference Number</i>	<i>Cross Reference Description</i>	<i>Package Number</i>	<i>Priority</i>	<i>Package Description</i>	<i>Package Group</i>
001-00-00-00000	Oregon Education Investment Board	010	0	Non-PICS Psnl Svc / Vacancy Factor	Essential Packages
001-00-00-00000	Oregon Education Investment Board	021	0	Phase-in	Essential Packages
001-00-00-00000	Oregon Education Investment Board	022	0	Phase-out Pgm & One-time Costs	Essential Packages
001-00-00-00000	Oregon Education Investment Board	031	0	Standard Inflation	Essential Packages
001-00-00-00000	Oregon Education Investment Board	032	0	Above Standard Inflation	Essential Packages
001-00-00-00000	Oregon Education Investment Board	033	0	Exceptional Inflation	Essential Packages
001-00-00-00000	Oregon Education Investment Board	060	0	Technical Adjustments	Essential Packages
001-00-00-00000	Oregon Education Investment Board	101	0	Removal of OEIB sunset	Policy Packages
001-00-00-00000	Oregon Education Investment Board	102	0	Reconfiguration of ETIC funding	Policy Packages
999-00-00-00000	Suspense	010	0	Non-PICS Psnl Svc / Vacancy Factor	Essential Packages
999-00-00-00000	Suspense	021	0	Phase-in	Essential Packages
999-00-00-00000	Suspense	022	0	Phase-out Pgm & One-time Costs	Essential Packages
999-00-00-00000	Suspense	031	0	Standard Inflation	Essential Packages
999-00-00-00000	Suspense	032	0	Above Standard Inflation	Essential Packages
999-00-00-00000	Suspense	033	0	Exoeptional Inflation	Essential Packages

**Oregon Education Investment Board**

Policy Package List by Priority  
2015-17 Biennium

Agency Number: 52400

BAM Analyst: McGee, Bill

Budget Coordinator: Heinrichs, Valerie - (503)373-0743

<i>Priority</i>	<i>Policy Pkg Number</i>	<i>Policy Pkg Description</i>	<i>Summary Cross Reference Number</i>	<i>Cross Reference Description</i>
0	101	Removal of OEIB sunset	001-00-00-00000	Oregon Education Investment Board
	102	Reconfiguration of ETIC funding	001-00-00-00000	Oregon Education Investment Board

**Oregon Education Investment Board**

**Agency Number: 52400**

Agency Worksheet - Revenues & Expenditures

Version: V - 01 - Agency Request Budget

2015-17 Biennium

Cross Reference Number: 52400-000-00-00-00000

Oregon Education Investment Board

DESCRIPTION	2011-13 Actuals	2013-15 Leg Adopted Budget	2013-15 Emergency Boards	2013-15 Leg Approved Budget	2015-17 Base Budget	2015-17 Current Service Level
<b>REVENUE CATEGORIES</b>						
<b>GENERAL FUND APPROPRIATION</b>						
<b>0050 General Fund Appropriation</b>						
8000 General Fund	-	6,035,608	14,972,691	21,008,299	21,010,445	12,912,353
<b>REVENUES</b>						
8000 General Fund	-	6,035,608	14,972,691	21,008,299	21,010,445	12,912,353
<b>AVAILABLE REVENUES</b>						
8000 General Fund	-	6,035,608	14,972,691	21,008,299	21,010,445	12,912,353
<b>EXPENDITURES</b>						
<b>PERSONAL SERVICES</b>						
<b>SALARIES &amp; WAGES</b>						
<b>3110 Class/Unclass Sal. and Per Diem</b>						
8000 General Fund	-	2,573,424	45,669	2,619,093	2,613,972	927,762
<b>3190 All Other Differential</b>						
8000 General Fund	-	287,904	-	287,904	287,904	104,975
<b>TOTAL SALARIES &amp; WAGES</b>						
8000 General Fund	-	2,861,328	45,669	2,906,997	2,901,876	1,032,737
<b>TOTAL SALARIES &amp; WAGES</b>	-	<b>\$2,861,328</b>	<b>\$45,669</b>	<b>\$2,906,997</b>	<b>\$2,901,876</b>	<b>\$1,032,737</b>
<b>OTHER PAYROLL EXPENSES</b>						
<b>3210 Empl. Rel. Bd. Assessments</b>						

**Oregon Education Investment Board**

**Agency Number: 52400**

Agency Worksheet - Revenues & Expenditures

Version: V - 01 - Agency Request Budget

2015-17 Biennium

Cross Reference Number: 52400-000-00-00-00000

Oregon Education Investment Board

DESCRIPTION	2011-13 Actuals	2013-15 Leg Adopted Budget	2013-15 Emergency Boards	2013-15 Leg Approved Budget	2015-17 Base Budget	2015-17 Current Service Level
8000 General Fund	-	600	-	600	660	660
<b>3220 Public Employees' Retire Cont</b>						
8000 General Fund	-	419,333	6,581	425,914	457,724	162,587
<b>3221 Pension Obligation Bond</b>						
8000 General Fund	-	100,000	73,480	173,480	173,480	63,844
<b>3230 Social Security Taxes</b>						
8000 General Fund	-	203,462	3,494	206,956	214,992	79,002
<b>3250 Worker's Comp. Assess. (WCD)</b>						
8000 General Fund	-	885	-	885	1,035	1,035
<b>3260 Mass Transit Tax</b>						
8000 General Fund	-	19,488	274	19,762	19,762	6,182
<b>3270 Flexible Benefits</b>						
8000 General Fund	-	457,920	6,678	464,598	457,920	-
<b>TOTAL OTHER PAYROLL EXPENSES</b>						
8000 General Fund	-	1,201,688	90,507	1,292,195	1,325,573	313,310
<b>TOTAL OTHER PAYROLL EXPENSES</b>	-	<b>\$1,201,688</b>	<b>\$90,507</b>	<b>\$1,292,195</b>	<b>\$1,325,573</b>	<b>\$313,310</b>
<b>P.S. BUDGET ADJUSTMENTS</b>						
<b>3465 Reconciliation Adjustment</b>						
8000 General Fund	-	143,956	-	143,956	-	-
<b>3991 PERS Policy Adjustment</b>						

**Oregon Education Investment Board**

**Agency Number: 52400**

Agency Worksheet - Revenues & Expenditures

Version: V - 01 - Agency Request Budget

2015-17 Biennium

Cross Reference Number: 52400-000-00-00-00000

Oregon Education Investment Board

DESCRIPTION	2011-13 Actuals	2013-15 Leg Adopted Budget	2013-15 Emergency Boards	2013-15 Leg Approved Budget	2015-17 Base Budget	2015-17 Current Service Level
8000 General Fund	-	(117,845)	-	(117,845)	-	-
<b>TOTAL P.S. BUDGET ADJUSTMENTS</b>						
8000 General Fund	-	26,111	-	26,111	-	-
<b>TOTAL P.S. BUDGET ADJUSTMENTS</b>	-	<b>\$26,111</b>	-	<b>\$26,111</b>	-	-
<b>TOTAL PERSONAL SERVICES</b>						
8000 General Fund	-	4,089,127	136,176	4,225,303	4,227,449	1,346,047
<b>TOTAL PERSONAL SERVICES</b>	-	<b>\$4,089,127</b>	<b>\$136,176</b>	<b>\$4,225,303</b>	<b>\$4,227,449</b>	<b>\$1,346,047</b>
<b>SERVICES &amp; SUPPLIES</b>						
<b>4100 Instate Travel</b>						
8000 General Fund	-	125,258	-	125,258	77,500	28,258
<b>4150 Employee Training</b>						
8000 General Fund	-	32,190	-	32,190	17,667	6,438
<b>4175 Office Expenses</b>						
8000 General Fund	-	33,090	-	33,090	25,000	9,115
<b>4200 Telecommunications</b>						
8000 General Fund	-	37,815	-	37,815	37,815	13,788
<b>4225 State Gov. Service Charges</b>						
8000 General Fund	-	285,000	-	285,000	32,200	15,133
<b>4250 Data Processing</b>						
8000 General Fund	-	-	-	-	87,379	31,860

Oregon Education Investment Board

Agency Number: 52400

Agency Worksheet - Revenues & Expenditures

Version: V - 01 - Agency Request Budget

2015-17 Biennium

Cross Reference Number: 52400-000-00-00-00000

Oregon Education Investment Board

DESCRIPTION	2011-13 Actuals	2013-15 Leg Adopted Budget	2013-15 Emergency Boards	2013-15 Leg Approved Budget	2015-17 Base Budget	2015-17 Current Service Level
<b>4275 Publicity and Publications</b>						
8000 General Fund	-	55,742	-	55,742	47,500	17,319
<b>4300 Professional Services</b>						
8000 General Fund	-	1,374,000	-	1,374,000	1,374,000	501,134
<b>4325 Attorney General</b>						
8000 General Fund	-	-	-	-	-	6,372
<b>4375 Employee Recruitment and Develop</b>						
8000 General Fund	-	4,500	-	4,500	4,500	1,641
<b>4400 Dues and Subscriptions</b>						
8000 General Fund	-	5,698	-	5,698	5,698	2,078
<b>4425 Facilities Rental and Taxes</b>						
8000 General Fund	-	64,144	-	64,144	64,144	39,143
<b>4650 Other Services and Supplies</b>						
8000 General Fund	-	10,193	-	10,193	175,614	64,032
<b>4675 Undistributed (S.S.)</b>						
8000 General Fund	-	(123,176)	30,794	(92,382)	-	-
<b>4700 Expendable Prop 250 - 5000</b>						
8000 General Fund	-	21,759	-	21,759	8,000	2,917
<b>4715 IT Expendable Property</b>						
8000 General Fund	-	20,268	-	20,268	20,268	7,390

Oregon Education Investment Board

Agency Number: 52400

Agency Worksheet - Revenues & Expenditures

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2015-17 Biennium

Cross Reference Number: 52400-000-00-00-00000

Oregon Education Investment Board

DESCRIPTION	2011-13 Actuals	2013-15 Leg Adopted Budget	2013-15 Emergency Boards	2013-15 Leg Approved Budget	2015-17 Base Budget	2015-17 Current Service Level
<b>TOTAL SERVICES &amp; SUPPLIES</b>						
8000 General Fund	-	1,946,481	30,794	1,977,275	1,977,275	746,618
<b>TOTAL SERVICES &amp; SUPPLIES</b>	-	<b>\$1,946,481</b>	<b>\$30,794</b>	<b>\$1,977,275</b>	<b>\$1,977,275</b>	<b>\$746,618</b>
<b>SPECIAL PAYMENTS</b>						
<b>6085 Other Special Payments</b>						
8000 General Fund	-	-	14,805,721	14,805,721	14,805,721	10,819,688
<b>EXPENDITURES</b>						
8000 General Fund	-	6,035,608	14,972,891	21,008,299	21,010,445	12,912,353
<b>ENDING BALANCE</b>						
8000 General Fund	-	-	-	-	-	-
<b>TOTAL ENDING BALANCE</b>	-	-	-	-	-	-
<b>AUTHORIZED POSITIONS</b>						
8150 Class/Unclass Positions	-	15	-	15	15	15
<b>AUTHORIZED FTE POSITIONS</b>						
8250 Class/Unclass FTE Positions	-	15.00	-	15.00	15.00	5.25

Oregon Education Investment Board

Agency Number: 52400

Agency Worksheet - Revenues & Expenditures  
 2015-17 Biennium  
 Oregon Education Investment Board

Version: V - 01 - Agency Request Budget  
 Cross Reference Number: 52400-001-00-00-00000

DESCRIPTION	2011-13 Actuals	2013-15 Leg Adopted Budget	2013-15 Emergency Boards	2013-15 Leg Approved Budget	2015-17 Base Budget	2015-17 Current Service Level
<b>REVENUE CATEGORIES</b>						
<b>GENERAL FUND APPROPRIATION</b>						
0050 General Fund Appropriation						
8000 General Fund	-	6,035,608	14,972,691	21,008,299	21,010,445	12,912,353
<b>REVENUES</b>						
8000 General Fund	-	6,035,608	14,972,691	21,008,299	21,010,445	12,912,353
<b>AVAILABLE REVENUES</b>						
8000 General Fund	-	6,035,608	14,972,691	21,008,299	21,010,445	12,912,353
<b>EXPENDITURES</b>						
<b>PERSONAL SERVICES</b>						
<b>SALARIES &amp; WAGES</b>						
3110 Class/Unclass Sal. and Per Diem						
8000 General Fund	-	2,573,424	45,669	2,619,093	2,613,972	927,762
3190 All Other Differential						
8000 General Fund	-	287,904	-	287,904	287,904	104,975
<b>TOTAL SALARIES &amp; WAGES</b>						
8000 General Fund	-	2,861,328	45,669	2,906,997	2,901,876	1,032,737
<b>TOTAL SALARIES &amp; WAGES</b>	-	<b>\$2,861,328</b>	<b>\$45,669</b>	<b>\$2,906,997</b>	<b>\$2,901,876</b>	<b>\$1,032,737</b>
<b>OTHER PAYROLL EXPENSES</b>						
3210 Empl. Rel. Bd. Assessments						

**Oregon Education Investment Board**

**Agency Number: 52400**

Agency Worksheet - Revenues & Expenditures

Version: V - 01 - Agency Request Budget

2015-17 Biennium

Cross Reference Number: 52400-001-00-00-00000

Oregon Education Investment Board

DESCRIPTION	2011-13 Actuals	2013-15 Leg Adopted Budget	2013-15 Emergency Boards	2013-15 Leg Approved Budget	2015-17 Base Budget	2015-17 Current Service Level
8000 General Fund	-	600	-	600	660	660
<b>3220 Public Employees' Retire Cont</b>						
8000 General Fund	-	419,333	6,581	425,914	457,724	162,587
<b>3221 Pension Obligation Bond</b>						
8000 General Fund	-	100,000	73,480	173,480	173,480	63,844
<b>3230 Social Security Taxes</b>						
8000 General Fund	-	203,462	3,494	206,956	214,992	79,002
<b>3250 Worker's Comp. Assess. (WCD)</b>						
8000 General Fund	-	885	-	885	1,035	1,035
<b>3260 Mass Transit Tax</b>						
8000 General Fund	-	19,488	274	19,762	19,762	6,182
<b>3270 Flexible Benefits</b>						
8000 General Fund	-	457,920	6,678	464,598	457,920	-
<b>TOTAL OTHER PAYROLL EXPENSES</b>						
8000 General Fund	-	1,201,688	90,507	1,292,195	1,325,573	313,310
<b>TOTAL OTHER PAYROLL EXPENSES</b>	-	<b>\$1,201,688</b>	<b>\$90,507</b>	<b>\$1,292,195</b>	<b>\$1,325,573</b>	<b>\$313,310</b>
<b>P.S. BUDGET ADJUSTMENTS</b>						
<b>3465 Reconciliation Adjustment</b>						
8000 General Fund	-	143,956	-	143,956	-	-
<b>3991 PERS Policy Adjustment</b>						

Oregon Education Investment Board

Agency Number: 52400

Agency Worksheet - Revenues & Expenditures  
 2015-17 Biennium  
 Oregon Education Investment Board

Version: V - 01 - Agency Request Budget  
 Cross Reference Number: 52400-001-00-00-00000

DESCRIPTION	2011-13 Actuals	2013-15 Leg Adopted Budget	2013-15 Emergency Boards	2013-15 Leg Approved Budget	2015-17 Base Budget	2015-17 Current Service Level
8000 General Fund	-	(117,845)	-	(117,845)	-	-
<b>TOTAL P.S. BUDGET ADJUSTMENTS</b>						
8000 General Fund	-	26,111	-	26,111	-	-
<b>TOTAL P.S. BUDGET ADJUSTMENTS</b>	-	<b>\$26,111</b>	-	<b>\$26,111</b>	-	-
<b>TOTAL PERSONAL SERVICES</b>						
8000 General Fund	-	4,089,127	136,176	4,225,303	4,227,449	1,346,047
<b>TOTAL PERSONAL SERVICES</b>	-	<b>\$4,089,127</b>	<b>\$136,176</b>	<b>\$4,225,303</b>	<b>\$4,227,449</b>	<b>\$1,346,047</b>
<b>SERVICES &amp; SUPPLIES</b>						
<b>4100 Instate Travel</b>						
8000 General Fund	-	125,258	-	125,258	77,500	28,258
<b>4150 Employee Training</b>						
8000 General Fund	-	32,190	-	32,190	17,657	6,438
<b>4175 Office Expenses</b>						
8000 General Fund	-	33,090	-	33,090	25,000	9,115
<b>4200 Telecommunications</b>						
8000 General Fund	-	37,815	-	37,815	37,815	13,788
<b>4225 State Gov. Service Charges</b>						
8000 General Fund	-	285,000	-	285,000	32,200	15,133
<b>4250 Data Processing</b>						
8000 General Fund	-	-	-	-	87,379	31,860

**Oregon Education Investment Board**

**Agency Number: 52400**

Agency Worksheet - Revenues & Expenditures

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DESCRIPTION	2011-13 Actuals	2013-15 Leg Adopted Budget	2013-15 Emergency Boards	2013-15 Leg Approved Budget	2015-17 Base Budget	2015-17 Current Service Level
<b>4275 Publicity and Publications</b>						
8000 General Fund	-	55,742	-	55,742	47,500	17,319
<b>4300 Professional Services</b>						
8000 General Fund	-	1,374,000	-	1,374,000	1,374,000	501,134
<b>4325 Attorney General</b>						
8000 General Fund	-	-	-	-	-	6,372
<b>4375 Employee Recruitment and Develop</b>						
8000 General Fund	-	4,500	-	4,500	4,500	1,641
<b>4400 Dues and Subscriptions</b>						
8000 General Fund	-	5,698	-	5,698	5,698	2,078
<b>4425 Facilities Rental and Taxes</b>						
8000 General Fund	-	64,144	-	64,144	64,144	39,143
<b>4650 Other Services and Supplies</b>						
8000 General Fund	-	10,193	-	10,193	175,614	64,032
<b>4675 Undistributed (S.S.)</b>						
8000 General Fund	-	(123,176)	30,794	(92,382)	-	-
<b>4700 Expendable Prop 250 - 5000</b>						
8000 General Fund	-	21,759	-	21,759	8,000	2,917
<b>4715 IT Expendable Property</b>						
8000 General Fund	-	20,268	-	20,268	20,268	7,390

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Agency Worksheet - Revenues & Expenditures  
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Version: V - 01 - Agency Request Budget  
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DESCRIPTION	2011-13 Actuals	2013-15 Leg Adopted Budget	2013-15 Emergency Boards	2013-15 Leg Approved Budget	2015-17 Base Budget	2015-17 Current Service Level
<b>TOTAL SERVICES &amp; SUPPLIES</b>						
8000 General Fund	-	1,946,481	30,794	1,977,275	1,977,275	746,618
<b>TOTAL SERVICES &amp; SUPPLIES</b>	-	<b>\$1,946,481</b>	<b>\$30,794</b>	<b>\$1,977,275</b>	<b>\$1,977,275</b>	<b>\$746,618</b>
<b>SPECIAL PAYMENTS</b>						
6085 Other Special Payments						
8000 General Fund	-	-	14,805,721	14,805,721	14,805,721	10,819,688
<b>EXPENDITURES</b>						
8000 General Fund	-	6,035,608	14,972,691	21,008,299	21,010,445	12,912,353
<b>ENDING BALANCE</b>						
8000 General Fund	-	-	-	-	-	-
<b>TOTAL ENDING BALANCE</b>	-	-	-	-	-	-
<b>AUTHORIZED POSITIONS</b>						
8150 Class/Unclass Positions	-	15	-	15	15	15
<b>AUTHORIZED FTE POSITIONS</b>						
8250 Class/Unclass FTE Positions	-	15.00	-	15.00	15.00	5.25

**Oregon Education Investment Board**

**Agency Number: 52400**

**Detail Revenues & Expenditures - Requested Budget**

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**Oregon Education Investment Board**

Description	2015-17 Base Budget	Essential Packages	2015-17 Current Service Level	Policy Packages	2015-17 Agency Request Budget
<b>REVENUE CATEGORIES</b>					
<b>GENERAL FUND APPROPRIATION</b>					
<b>0050 General Fund Appropriation</b>					
8000 General Fund	21,010,445	(8,098,092)	12,912,353	(230,164)	12,682,189
<b>AVAILABLE REVENUES</b>					
8000 General Fund	21,010,445	(8,098,092)	12,912,353	(230,164)	12,682,189
<b>EXPENDITURES</b>					
<b>PERSONAL SERVICES</b>					
<b>SALARIES &amp; WAGES</b>					
<b>3110 Class/Unclass Sal. and Per Diem</b>					
8000 General Fund	2,613,972	(1,686,210)	927,762	131,808	1,059,570
<b>3190 All Other Differential</b>					
8000 General Fund	287,904	(182,929)	104,975	191,565	296,540
<b>TOTAL SALARIES &amp; WAGES</b>					
8000 General Fund	2,901,876	(1,869,139)	1,032,737	323,373	1,356,110
<b>OTHER PAYROLL EXPENSES</b>					
<b>3210 Empl. Rel. Bd. Assessments</b>					
8000 General Fund	660	-	660	44	704
<b>3220 Public Employees' Retire Cont</b>					
8000 General Fund	457,724	(295,137)	162,587	51,061	213,648
<b>3221 Pension Obligation Bond</b>					
8000 General Fund	173,480	(109,636)	63,844	-	63,844
<b>3230 Social Security Taxes</b>					

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Detail Revenues & Expenditures - Requested Budget  
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Oregon Education Investment Board

Description	2015-17 Base Budget	Essential Packages	2015-17 Current Service Level	Policy Packages	2015-17 Agency Request Budget
8000 General Fund	214,992	(135,990)	79,002	24,738	103,740
<b>3250 Worker's Comp. Assess. (WCD)</b>					
8000 General Fund	1,035	-	1,035	69	1,104
<b>3260 Mass Transit Tax</b>					
8000 General Fund	19,762	(13,580)	6,182	12,072	18,254
<b>3270 Flexible Benefits</b>					
8000 General Fund	457,920	(457,920)	-	30,528	30,528
<b>3280 Other OPE</b>					
8000 General Fund	-	-	-	2,648,884	2,648,884
<b>TOTAL OTHER PAYROLL EXPENSES</b>					
8000 General Fund	1,325,573	(1,012,263)	313,310	2,767,396	3,080,706
<b>TOTAL PERSONAL SERVICES</b>					
8000 General Fund	4,227,449	(2,881,402)	1,346,047	3,090,769	4,436,816
<b>SERVICES &amp; SUPPLIES</b>					
<b>4100 Instate Travel</b>					
8000 General Fund	77,500	(49,242)	28,258	52,258	80,516
<b>4150 Employee Training</b>					
8000 General Fund	17,657	(11,219)	6,438	15,332	21,770
<b>4175 Office Expenses</b>					
8000 General Fund	25,000	(15,885)	9,115	18,683	27,798
<b>4200 Telecommunications</b>					
8000 General Fund	37,815	(24,027)	13,788	26,697	40,485
<b>4225 State Gov. Service Charges</b>					

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Oregon Education Investment Board

Description	2015-17 Base Budget	Essential Packages	2015-17 Current Service Level	Policy Packages	2015-17 Agency Request Budget
8000 General Fund	32,200	(17,067)	15,133	30,868	46,001
<b>4250 Data Processing</b>					
8000 General Fund	87,379	(55,519)	31,860	58,806	90,666
<b>4275 Publicity and Publications</b>					
8000 General Fund	47,500	(30,181)	17,319	32,118	49,437
<b>4300 Professional Services</b>					
8000 General Fund	1,374,000	(872,866)	501,134	914,498	1,415,632
<b>4325 Attorney General</b>					
8000 General Fund	-	6,372	6,372	11,628	18,000
<b>4375 Employee Recruitment and Develop</b>					
8000 General Fund	4,500	(2,859)	1,641	3,404	5,045
<b>4400 Dues and Subscriptions</b>					
8000 General Fund	5,898	(3,620)	2,078	4,303	6,381
<b>4425 Facilities Rental and Taxes</b>					
8000 General Fund	64,144	(25,001)	39,143	78,713	117,856
<b>4650 Other Services and Supplies</b>					
8000 General Fund	175,614	(111,582)	64,032	117,362	181,394
<b>4700 Expendable Prop 250 - 5000</b>					
8000 General Fund	8,000	(5,083)	2,917	7,781	10,698
<b>4715 IT Expendable Property</b>					
8000 General Fund	20,268	(12,878)	7,390	13,486	20,876
<b>TOTAL SERVICES &amp; SUPPLIES</b>					
8000 General Fund	1,977,275	(1,230,657)	746,618	1,385,937	2,132,555

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Oregon Education Investment Board

Description	2015-17 Base Budget	Essential Packages	2015-17 Current Service Level	Policy Packages	2015-17 Agency Request Budget
<b>SPECIAL PAYMENTS</b>					
6085 Other Special Payments					
8000 General Fund	14,805,721	(3,986,033)	10,819,688	(4,706,870)	6,112,818
<b>TOTAL EXPENDITURES</b>					
8000 General Fund	21,010,445	(8,098,092)	12,912,353	(230,164)	12,682,189
<b>AUTHORIZED POSITIONS</b>					
8150 Class/Unclass Positions	15	-	15	1	16
<b>AUTHORIZED FTE</b>					
8250 Class/Unclass FTE Positions	15.00	(9.75)	5.25	1.00	6.25
8280 FTE Reconciliation	-	-	-	9.75	9.75
<b>TOTAL AUTHORIZED FTE</b>	<b>15.00</b>	<b>(9.75)</b>	<b>5.25</b>	<b>10.75</b>	<b>16.00</b>

**Oregon Education Investment Board**

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**Detail Revenues & Expenditures - Requested Budget  
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**Oregon Education Investment Board**

Description	2015-17 Base Budget	Essential Packages	2015-17 Current Service Level	Policy Packages	2015-17 Agency Request Budget
<b>REVENUE CATEGORIES</b>					
<b>GENERAL FUND APPROPRIATION</b>					
<b>0050 General Fund Appropriation</b>					
8000 General Fund	21,010,445	(8,098,092)	12,912,353	(230,164)	12,682,189
<b>AVAILABLE REVENUES</b>					
8000 General Fund	21,010,445	(8,098,092)	12,912,353	(230,164)	12,682,189
<b>EXPENDITURES</b>					
<b>PERSONAL SERVICES</b>					
<b>SALARIES &amp; WAGES</b>					
<b>3110 Class/Unclass Sal. and Per Diem</b>					
8000 General Fund	2,613,972	(1,686,210)	927,762	131,808	1,059,570
<b>3190 All Other Differential</b>					
8000 General Fund	287,904	(182,929)	104,975	191,565	296,540
<b>TOTAL SALARIES &amp; WAGES</b>					
8000 General Fund	2,901,876	(1,869,139)	1,032,737	323,373	1,356,110
<b>OTHER PAYROLL EXPENSES</b>					
<b>3210 Emp. Rel. Bd. Assessments</b>					
8000 General Fund	660	-	660	44	704
<b>3220 Public Employees' Retire Cont</b>					
8000 General Fund	457,724	(295,137)	162,587	51,061	213,648
<b>3221 Pension Obligation Bond</b>					
8000 General Fund	173,480	(109,636)	63,844	-	63,844
<b>3230 Social Security Taxes</b>					

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Oregon Education Investment Board

Description	2015-17 Base Budget	Essential Packages	2015-17 Current Service Level	Policy Packages	2015-17 Agency Request Budget
8000 General Fund	214,992	(135,990)	79,002	24,738	103,740
<b>3250 Worker's Comp. Assess. (WCD)</b>					
8000 General Fund	1,035	-	1,035	69	1,104
<b>3260 Mass Transit Tax</b>					
8000 General Fund	19,762	(13,580)	6,182	12,072	18,254
<b>3270 Flexible Benefits</b>					
8000 General Fund	457,920	(457,920)	-	30,528	30,528
<b>3280 Other OPE</b>					
8000 General Fund	-	-	-	2,648,884	2,648,884
<b>TOTAL OTHER PAYROLL EXPENSES</b>					
8000 General Fund	1,325,573	(1,012,263)	313,310	2,767,396	3,080,706
<b>TOTAL PERSONAL SERVICES</b>					
8000 General Fund	4,227,449	(2,881,402)	1,346,047	3,090,769	4,436,816
<b>SERVICES &amp; SUPPLIES</b>					
<b>4100 Instate Travel</b>					
8000 General Fund	77,500	(49,242)	28,258	52,258	80,516
<b>4150 Employee Training</b>					
8000 General Fund	17,657	(11,219)	6,438	15,332	21,770
<b>4175 Office Expenses</b>					
8000 General Fund	25,000	(15,885)	9,115	18,683	27,798
<b>4200 Telecommunications</b>					
8000 General Fund	37,815	(24,027)	13,788	26,697	40,485
<b>4225 State Gov. Service Charges</b>					

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Oregon Education Investment Board

Description	2015-17 Base Budget	Essential Packages	2015-17 Current Service Level	Policy Packages	2015-17 Agency Request Budget
8000 General Fund	32,200	(17,067)	15,133	30,868	46,001
<b>4250 Data Processing</b>					
8000 General Fund	87,379	(55,519)	31,860	58,806	90,666
<b>4275 Publicity and Publications</b>					
8000 General Fund	47,500	(30,181)	17,319	32,118	49,437
<b>4300 Professional Services</b>					
8000 General Fund	1,374,000	(872,866)	501,134	914,498	1,415,632
<b>4325 Attorney General</b>					
8000 General Fund	-	6,372	6,372	11,628	18,000
<b>4375 Employee Recruitment and Develop</b>					
8000 General Fund	4,500	(2,859)	1,641	3,404	5,045
<b>4400 Dues and Subscriptions</b>					
8000 General Fund	5,698	(3,620)	2,078	4,303	6,381
<b>4425 Facilities Rental and Taxes</b>					
8000 General Fund	64,144	(25,001)	39,143	78,713	117,856
<b>4650 Other Services and Supplies</b>					
8000 General Fund	175,614	(111,582)	64,032	117,362	181,394
<b>4700 Expendable Prop 250 - 5000</b>					
8000 General Fund	8,000	(5,083)	2,917	7,781	10,698
<b>4715 IT Expendable Property</b>					
8000 General Fund	20,268	(12,878)	7,390	13,486	20,876
<b>TOTAL SERVICES &amp; SUPPLIES</b>					
8000 General Fund	1,977,275	(1,230,657)	746,618	1,385,937	2,132,555

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Detail Revenues & Expenditures - Requested Budget  
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Oregon Education Investment Board

Description	2015-17 Base Budget	Essential Packages	2015-17 Current Service Level	Policy Packages	2015-17 Agency Request Budget
<b>SPECIAL PAYMENTS</b>					
6085 Other Special Payments					
8000 General Fund	14,805,721	(3,986,033)	10,819,688	(4,706,870)	6,112,818
<b>TOTAL EXPENDITURES</b>					
8000 General Fund	21,010,445	(8,098,092)	12,912,353	(230,164)	12,682,189
<b>AUTHORIZED POSITIONS</b>					
8150 Class/Unclass Positions	15	-	15	1	16
<b>AUTHORIZED FTE</b>					
8250 Class/Unclass FTE Positions	15.00	(9.75)	5.25	1.00	6.25
8280 FTE Reconciliation	-	-	-	9.75	9.75
<b>TOTAL AUTHORIZED FTE</b>	<b>15.00</b>	<b>(9.75)</b>	<b>5.25</b>	<b>10.75</b>	<b>16.00</b>

BDV004B

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Oregon Education Investment Board

Description	Total Essential Packages	Pkg: 010 Non-PICS Psnl Svc / Vacancy Factor  Priority: 00	Pkg: 021 Phase-in  Priority: 00	Pkg: 031 Standard Inflation  Priority: 00	Pkg: 032 Above Standard inflation  Priority: 00	Pkg: 060 Technical Adjustments  Priority: 00
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REVENUE CATEGORIES

GENERAL FUND APPROPRIATION

0050 General Fund Appropriation

8000 General Fund (8,098,092) 15,232 15,820,210 68,901 1,079 (24,003,514)

AVAILABLE REVENUES

8000 General Fund (8,098,092) 15,232 15,820,210 68,901 1,079 (24,003,514)

**TOTAL AVAILABLE REVENUES (\$8,098,092) \$15,232 \$15,820,210 \$68,901 \$1,079 (\$24,003,514)**

EXPENDITURES

PERSONAL SERVICES

SALARIES & WAGES

3110 Class/Unclss Sal. and Per Diem

8000 General Fund (1,686,210) - - - - (1,686,210)

3190 All Other Differential

8000 General Fund (182,929) 8,637 - - - (191,566)

SALARIES & WAGES

8000 General Fund (1,869,139) 8,637 - - - (1,877,776)

**TOTAL SALARIES & WAGES (\$1,869,139) \$8,637 - - - (\$1,877,776)**

OTHER PAYROLL EXPENSES

3220 Public Employees Retire Cont

8000 General Fund (295,137) 1,364 - - - (296,501)

3221 Pension Obligation Bond

8000 General Fund (109,536) 6,869 - - - (116,505)

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Oregon Education Investment Board

Description	Total Essential Packages	Pkg: 010	Pkg: 021	Pkg: 031	Pkg: 032	Pkg: 060
		Non-PICS Psnl Svc / Vacancy Factor	Phase-in	Standard Inflation	Above Standard Inflation	Technical Adjustments
		Priority: 00	Priority: 00	Priority: 00	Priority: 00	Priority: 00
<b>3230 Social Security Taxes</b>						
8000 General Fund	(135,990)	661	-	-	-	(136,651)
<b>3260 Mass Transit Tax</b>						
8000 General Fund	(13,580)	(2,299)	-	-	-	(11,281)
<b>3270 Flexible Benefits</b>						
8000 General Fund	(457,920)	-	-	-	-	(457,920)
<b>OTHER PAYROLL EXPENSES</b>						
8000 General Fund	(1,012,263)	6,595	-	-	-	(1,018,858)
<b>TOTAL OTHER PAYROLL EXPENSES</b>	<b>(\$1,012,263)</b>	<b>\$6,595</b>	-	-	-	<b>(\$1,018,858)</b>
<b>PERSONAL SERVICES</b>						
8000 General Fund	(2,881,402)	15,232	-	-	-	(2,896,634)
<b>TOTAL PERSONAL SERVICES</b>	<b>(\$2,881,402)</b>	<b>\$15,232</b>	-	-	-	<b>(\$2,896,634)</b>
<b>SERVICES &amp; SUPPLIES</b>						
<b>4100 Instate Travel</b>						
8000 General Fund	(49,242)	-	-	2,325	-	(51,567)
<b>4150 Employee Training</b>						
8000 General Fund	(11,219)	-	-	530	-	(11,749)
<b>4175 Office Expenses</b>						
8000 General Fund	(15,865)	-	-	750	-	(16,635)
<b>4200 Telecommunications</b>						
8000 General Fund	(24,027)	-	-	1,134	-	(25,161)
<b>4225 State Gov. Service Charges</b>						

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Oregon Education Investment Board

Description	Total Essential Packages	Pkg: 010	Pkg: 021	Pkg: 031	Pkg: 032	Pkg: 060
		Non-PICS Psnl Svc / Vacancy Factor	Phase-in	Standard Inflation	Above Standard Inflation	Technical Adjustments
		Priority: 00	Priority: 00	Priority: 00	Priority: 00	Priority: 00
8000 General Fund	(17,067)	-	-	10,550	-	(27,617)
<b>4250 Data Processing</b>						
8000 General Fund	(55,519)	-	-	2,621	-	(58,140)
<b>4275 Publicity and Publications</b>						
8000 General Fund	(30,181)	-	-	1,425	-	(31,606)
<b>4300 Professional Services</b>						
8000 General Fund	(872,866)	-	-	41,220	412	(914,498)
<b>4325 Attorney General</b>						
8000 General Fund	6,372	-	18,000	-	-	(11,628)
<b>4375 Employee Recruitment and Develop</b>						
8000 General Fund	(2,859)	-	-	135	-	(2,994)
<b>4400 Dues and Subscriptions</b>						
8000 General Fund	(3,620)	-	-	171	-	(3,791)
<b>4425 Facilities Rental and Taxes</b>						
8000 General Fund	(25,001)	-	43,839	1,924	667	(71,431)
<b>4650 Other Services and Supplies</b>						
8000 General Fund	(111,582)	-	-	5,268	-	(116,850)
<b>4700 Expendable Prop 250 - 5000</b>						
8000 General Fund	(5,083)	-	-	240	-	(5,323)
<b>4715 IT Expendable Property</b>						
8000 General Fund	(12,878)	-	-	608	-	(13,486)
<b>SERVICES &amp; SUPPLIES</b>						
8000 General Fund	(1,230,657)	-	61,839	68,901	1,079	(1,362,478)

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Description	Total Essential Packages	Pkg: 010 Non-PICS Psnl Svc / Vacancy Factor  Priority: 00	Pkg: 021 Phase-in  Priority: 00	Pkg: 031 Standard Inflation  Priority: 00	Pkg: 032 Above Standard Inflation  Priority: 00	Pkg: 060 Technical Adjustments  Priority: 00
<b>TOTAL SERVICES &amp; SUPPLIES</b>	<b>(\$1,230,657)</b>	-	<b>\$61,839</b>	<b>\$68,901</b>	<b>\$1,079</b>	<b>(\$1,362,476)</b>
<b>SPECIAL PAYMENTS</b>						
6085 Other Special Payments						
8000 General Fund	(3,986,033)	-	15,758,371	-	-	(19,744,404)
<b>EXPENDITURES</b>						
8000 General Fund	(8,098,092)	15,232	15,820,210	68,901	1,079	(24,003,514)
<b>TOTAL EXPENDITURES</b>	<b>(\$8,098,092)</b>	<b>\$15,232</b>	<b>\$15,820,210</b>	<b>\$68,901</b>	<b>\$1,079</b>	<b>(\$24,003,514)</b>
<b>ENDING BALANCE</b>						
8000 General Fund	-	-	-	-	-	-
<b>TOTAL ENDING BALANCE</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>AUTHORIZED FTE</b>						
8250 Class/Unclass FTE Positions	(9.75)	-	-	-	-	(9.75)

Oregon Education Investment Board

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Cross Reference Number: 52400-001-00-00-00000

Oregon Education Investment Board

Description	Total Essential Packages	Pkg: 010 Non-PICS Psnl Svc / Vacancy Factor  Priority: 00	Pkg: 021 Phase-in  Priority: 00	Pkg: 031 Standard Inflation  Priority: 00	Pkg: 032 Above Standard Inflation  Priority: 00	Pkg: 060 Technical Adjustments  Priority: 00
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REVENUE CATEGORIES

GENERAL FUND APPROPRIATION

0050 General Fund Appropriation

8000 General Fund (8,098,092) 15,232 15,820,210 68,901 1,079 (24,003,514)

AVAILABLE REVENUES

8000 General Fund (8,098,092) 15,232 15,820,210 68,901 1,079 (24,003,514)

**TOTAL AVAILABLE REVENUES (\$8,098,092) \$15,232 \$15,820,210 \$68,901 \$1,079 (\$24,003,514)**

EXPENDITURES

PERSONAL SERVICES

SALARIES & WAGES

3110 Class/Unclass Sal. and Per Diem

8000 General Fund (1,686,210) - - - - (1,686,210)

3190 All Other Differential

8000 General Fund (182,929) 8,637 - - - (191,566)

SALARIES & WAGES

8000 General Fund (1,869,139) 8,637 - - - (1,877,776)

**TOTAL SALARIES & WAGES (\$1,869,139) \$8,637 - - - (\$1,877,776)**

OTHER PAYROLL EXPENSES

3220 Public Employees Retire Cont

8000 General Fund (295,137) 1,364 - - - (296,501)

3221 Pension Obligation Bond

8000 General Fund (109,636) 6,869 - - - (116,505)

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Oregon Education Investment Board

Description	Total Essential Packages	Pkg: 010	Pkg: 021	Pkg: 031	Pkg: 032	Pkg: 060
		Non-PICS Psnl Svc / Vacancy Factor	Phase-in	Standard Inflation	Above Standard Inflation	Technical Adjustments
		Priority: 00	Priority: 00	Priority: 00	Priority: 00	Priority: 00
<b>3230 Social Security Taxes</b>						
8000 General Fund	(135,990)	661	-	-	-	(136,651)
<b>3260 Mass Transit Tax</b>						
8000 General Fund	(13,580)	(2,299)	-	-	-	(11,281)
<b>3270 Flexible Benefits</b>						
8000 General Fund	(457,920)	-	-	-	-	(457,920)
<b>OTHER PAYROLL EXPENSES</b>						
8000 General Fund	(1,012,263)	6,595	-	-	-	(1,018,858)
<b>TOTAL OTHER PAYROLL EXPENSES</b>	<b>(\$1,012,263)</b>	<b>\$6,595</b>	-	-	-	<b>(\$1,018,858)</b>
<b>PERSONAL SERVICES</b>						
8000 General Fund	(2,881,402)	15,232	-	-	-	(2,896,634)
<b>TOTAL PERSONAL SERVICES</b>	<b>(\$2,881,402)</b>	<b>\$15,232</b>	-	-	-	<b>(\$2,896,634)</b>
<b>SERVICES &amp; SUPPLIES</b>						
<b>4100 Instate Travel</b>						
8000 General Fund	(49,242)	-	-	2,325	-	(51,567)
<b>4150 Employee Training</b>						
8000 General Fund	(11,219)	-	-	530	-	(11,749)
<b>4175 Office Expenses</b>						
8000 General Fund	(15,885)	-	-	750	-	(16,635)
<b>4200 Telecommunications</b>						
8000 General Fund	(24,027)	-	-	1,134	-	(25,161)
<b>4225 State Gov. Service Charges</b>						

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Description	Total Essential Packages	Pkg: 010 Non-PICS Psnl Svc / Vacancy Factor  Priority: 00	Pkg: 021 Phase-In  Priority: 00	Pkg: 031 Standard Inflation  Priority: 00	Pkg: 032 Above Standard Inflation  Priority: 00	Pkg: 060 Technical Adjustments  Priority: 00
8000 General Fund	(17,067)	-	-	10,550	-	(27,617)
<b>4250 Data Processing</b>						
8000 General Fund	(55,519)	-	-	2,621	-	(58,140)
<b>4275 Publicity and Publications</b>						
8000 General Fund	(30,181)	-	-	1,425	-	(31,606)
<b>4300 Professional Services</b>						
8000 General Fund	(872,866)	-	-	41,220	412	(914,498)
<b>4325 Attorney General</b>						
8000 General Fund	6,372	-	18,000	-	-	(11,628)
<b>4375 Employee Recruitment and Develop</b>						
8000 General Fund	(2,859)	-	-	135	-	(2,994)
<b>4400 Dues and Subscriptions</b>						
8000 General Fund	(3,620)	-	-	171	-	(3,791)
<b>4425 Facilities Rental and Taxes</b>						
8000 General Fund	(25,001)	-	43,839	1,924	667	(71,431)
<b>4650 Other Services and Supplies</b>						
8000 General Fund	(111,582)	-	-	5,268	-	(116,850)
<b>4700 Expendable Prop 250 - 5000</b>						
8000 General Fund	(5,083)	-	-	240	-	(5,323)
<b>4715 IT Expendable Property</b>						
8000 General Fund	(12,878)	-	-	608	-	(13,486)
<b>SERVICES &amp; SUPPLIES</b>						
8000 General Fund	(1,230,657)	-	61,839	68,901	1,079	(1,362,476)

Oregon Education Investment Board

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Description	Total Essential Packages	Pkg: 010 Non-PICS Psnl Svc / Vacancy Factor  Priority: 00	Pkg: 021 Phase-in  Priority: 00	Pkg: 031 Standard Inflation  Priority: 00	Pkg: 032 Above Standard Inflation  Priority: 00	Pkg: 060 Technical Adjustments  Priority: 00
<b>TOTAL SERVICES &amp; SUPPLIES</b>	<b>(\$1,230,657)</b>	-	<b>\$61,839</b>	<b>\$68,901</b>	<b>\$1,079</b>	<b>(\$1,362,476)</b>
<b>SPECIAL PAYMENTS</b>						
6085 Other Special Payments						
8000 General Fund	(3,986,033)	-	15,758,371	-	-	(19,744,404)
<b>EXPENDITURES</b>						
8000 General Fund	(8,098,092)	15,232	15,820,210	68,901	1,079	(24,003,514)
<b>TOTAL EXPENDITURES</b>	<b>(\$8,098,092)</b>	<b>\$15,232</b>	<b>\$15,820,210</b>	<b>\$68,901</b>	<b>\$1,079</b>	<b>(\$24,003,514)</b>
<b>ENDING BALANCE</b>						
8000 General Fund	-	-	-	-	-	-
<b>TOTAL ENDING BALANCE</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>AUTHORIZED FTE</b>						
8250 Class/Unclass FTE Positions	(9.75)	-	-	-	-	(9.75)

**Oregon Education Investment Board**

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Oregon Education Investment Board

Description	Total Policy Packages	Pkg: 101 Removal of OEIB sunset  Priority: 00	Pkg: 102 Reconfiguration of ETIC funding  Priority: 00			
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**REVENUE CATEGORIES**

**GENERAL FUND APPROPRIATION**

**0050 General Fund Appropriation**

8000 General Fund (230,164) 24,003,513 (24,233,677)

**AVAILABLE REVENUES**

8000 General Fund (230,164) 24,003,513 (24,233,677)

**TOTAL AVAILABLE REVENUES (\$230,164) \$24,003,513 (\$24,233,677)**

**EXPENDITURES**

**PERSONAL SERVICES**

**SALARIES & WAGES**

**3110 Class/Unclass Sal. and Per Diem**

8000 General Fund 131,808 - 131,808

**3190 All Other Differential**

8000 General Fund 191,565 191,565 -

**SALARIES & WAGES**

8000 General Fund 323,373 191,565 131,808

**TOTAL SALARIES & WAGES \$323,373 \$191,565 \$131,808**

**OTHER PAYROLL EXPENSES**

**3210 Empl. Rel. Bd. Assessments**

8000 General Fund 44 - 44

**3220 Public Employees Retire Cont**

8000 General Fund 51,061 30,248 20,813

Oregon Education Investment Board

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Oregon Education Investment Board

Description	Total Policy Packages	Pkg: 101 Removal of OEIB sunset  Priority: 00	Pkg: 102 Reconfiguration of ETIC funding  Priority: 00			
<b>3230 Social Security Taxes</b>						
8000 General Fund	24,738	14,855	10,083			
<b>3250 Workers Comp. Assess. (WCD)</b>						
8000 General Fund	69	-	69			
<b>3260 Mass Transit Tax</b>						
8000 General Fund	12,072	11,281	791			
<b>3270 Flexible Benefits</b>						
8000 General Fund	30,528	-	30,528			
<b>3280 Other OPE</b>						
8000 General Fund	2,648,884	2,648,884	-			
<b>OTHER PAYROLL EXPENSES</b>						
8000 General Fund	2,767,396	2,705,068	62,328			
<b>TOTAL OTHER PAYROLL EXPENSES</b>	<b>\$2,767,396</b>	<b>\$2,705,068</b>	<b>\$62,328</b>			
<b>PERSONAL SERVICES</b>						
8000 General Fund	3,090,769	2,896,633	194,136			
<b>TOTAL PERSONAL SERVICES</b>	<b>\$3,090,769</b>	<b>\$2,896,633</b>	<b>\$194,136</b>			
<b>SERVICES &amp; SUPPLIES</b>						
<b>4100 Instate Travel</b>						
8000 General Fund	52,258	51,567	691			
<b>4150 Employee Training</b>						
8000 General Fund	15,332	11,749	3,583			
<b>4175 Office Expenses</b>						

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Description	Total Policy Packages	Pkg: 101	Pkg: 102			
		Removal of OEIB sunset	Reconfiguration of ETIC funding			
		Priority: 00	Priority: 00			
8000 General Fund	18,683	16,635	2,048			
<b>4200 Telecommunications</b>						
8000 General Fund	26,697	25,161	1,536			
<b>4225 State Gov. Service Charges</b>						
8000 General Fund	30,868	27,617	3,251			
<b>4250 Data Processing</b>						
8000 General Fund	58,806	58,140	666			
<b>4275 Publicity and Publications</b>						
8000 General Fund	32,118	31,606	512			
<b>4300 Professional Services</b>						
8000 General Fund	914,498	914,498	-			
<b>4325 Attorney General</b>						
8000 General Fund	11,628	11,628	-			
<b>4375 Employee Recruitment and Develop</b>						
8000 General Fund	3,404	2,994	410			
<b>4400 Dues and Subscriptions</b>						
8000 General Fund	4,303	3,791	512			
<b>4425 Facilities Rental and Taxes</b>						
8000 General Fund	78,713	71,431	7,282			
<b>4650 Other Services and Supplies</b>						
8000 General Fund	117,362	116,850	512			
<b>4700 Expendable Prop 250 - 5000</b>						
8000 General Fund	7,781	5,323	2,458			

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Description	Total Policy Packages	Pkg: 101 Removal of OEIB sunset  Priority: 00	Pkg: 102 Reconfiguration of ETIC funding  Priority: 00			
4715 IT Expendable Property						
8000 General Fund	13,486	13,486	-			
<b>SERVICES &amp; SUPPLIES</b>						
8000 General Fund	1,385,937	1,362,476	23,461			
<b>TOTAL SERVICES &amp; SUPPLIES</b>	<b>\$1,385,937</b>	<b>\$1,362,476</b>	<b>\$23,461</b>			
<b>SPECIAL PAYMENTS</b>						
6085 Other Special Payments						
8000 General Fund	(4,706,870)	19,744,404	(24,451,274)			
<b>EXPENDITURES</b>						
8000 General Fund	(230,164)	24,003,513	(24,233,677)			
<b>TOTAL EXPENDITURES</b>	<b>(\$230,164)</b>	<b>\$24,003,513</b>	<b>(\$24,233,677)</b>			
<b>ENDING BALANCE</b>						
8000 General Fund	-	-	-			
<b>TOTAL ENDING BALANCE</b>	<b>-</b>	<b>-</b>	<b>-</b>			
<b>AUTHORIZED POSITIONS</b>						
8150 Class/Unclass Positions	1	-	1			
<b>AUTHORIZED FTE</b>						
8250 Class/Unclass FTE Positions	1.00	-	1.00			
8280 FTE Reconciliation	9.75	9.75	-			
<b>TOTAL AUTHORIZED FTE</b>	<b>10.75</b>	<b>9.75</b>	<b>1.00</b>			

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Description	Total Policy Packages	Pkg: 101 Removal of OEIB sunset	Pkg: 102 Reconfiguration of ETIC funding			
		Priority: 00	Priority: 00			

REVENUE CATEGORIES

GENERAL FUND APPROPRIATION

0050 General Fund Appropriation

8000 General Fund (230,164) 24,003,513 (24,233,677)

AVAILABLE REVENUES

8000 General Fund (230,164) 24,003,513 (24,233,677)

TOTAL AVAILABLE REVENUES

(\$230,164) \$24,003,513 (\$24,233,677)

EXPENDITURES

PERSONAL SERVICES

SALARIES & WAGES

3110 Class/Unclass Sal. and Per Diem

8000 General Fund 131,808 - 131,808

3190 All Other Differential

8000 General Fund 191,565 191,565 -

SALARIES & WAGES

8000 General Fund 323,373 191,565 131,808

TOTAL SALARIES & WAGES

\$323,373 \$191,565 \$131,808

OTHER PAYROLL EXPENSES

3210 Empl. Rel. Bd. Assessments

8000 General Fund 44 - 44

3220 Public Employees Retire Cont

8000 General Fund 51,061 30,248 20,813

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Oregon Education Investment Board

Description	Total Policy Packages	Pkg: 101	Pkg: 102			
		Removal of OEIB sunset	Reconfiguration of ETIC funding			
		Priority: 00	Priority: 00			
<b>3230 Social Security Taxes</b>						
8000 General Fund	24,738	14,655	10,083			
<b>3250 Workers Comp. Assess. (WCD)</b>						
8000 General Fund	69	-	69			
<b>3260 Mass Transit Tax</b>						
8000 General Fund	12,072	11,281	791			
<b>3270 Flexible Benefits</b>						
8000 General Fund	30,528	-	30,528			
<b>3280 Other OPE</b>						
8000 General Fund	2,648,884	2,648,884	-			
<b>OTHER PAYROLL EXPENSES</b>						
8000 General Fund	2,767,396	2,705,068	62,328			
<b>TOTAL OTHER PAYROLL EXPENSES</b>	<b>\$2,767,396</b>	<b>\$2,705,068</b>	<b>\$62,328</b>			
<b>PERSONAL SERVICES</b>						
8000 General Fund	3,090,769	2,896,633	194,136			
<b>TOTAL PERSONAL SERVICES</b>	<b>\$3,090,769</b>	<b>\$2,896,633</b>	<b>\$194,136</b>			
<b>SERVICES &amp; SUPPLIES</b>						
<b>4100 Instate Travel</b>						
8000 General Fund	52,258	51,567	691			
<b>4150 Employee Training</b>						
8000 General Fund	15,332	11,749	3,583			
<b>4175 Office Expenses</b>						

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Oregon Education Investment Board

Description	Total Policy Packages	Pkg: 101 Removal of OEIB sunset  Priority: 00	Pkg: 102 Reconfiguration of ETIC funding  Priority: 00			
8000 General Fund	18,683	16,635	2,048			
<b>4200 Telecommunications</b>						
8000 General Fund	26,697	25,161	1,536			
<b>4225 State Gov. Service Charges</b>						
8000 General Fund	30,868	27,617	3,251			
<b>4250 Data Processing</b>						
8000 General Fund	58,806	58,140	666			
<b>4275 Publicity and Publications</b>						
8000 General Fund	32,118	31,606	512			
<b>4300 Professional Services</b>						
8000 General Fund	914,498	914,498	-			
<b>4325 Attorney General</b>						
8000 General Fund	11,628	11,628	-			
<b>4375 Employee Recruitment and Develop</b>						
8000 General Fund	3,404	2,994	410			
<b>4400 Dues and Subscriptions</b>						
8000 General Fund	4,303	3,791	512			
<b>4425 Facilities Rental and Taxes</b>						
8000 General Fund	78,713	71,431	7,282			
<b>4650 Other Services and Supplies</b>						
8000 General Fund	117,362	116,850	512			
<b>4700 Expendable Prop 250 - 5000</b>						
8000 General Fund	7,781	5,323	2,458			

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Oregon Education Investment Board

Description	Total Policy Packages	Pkg: 101 Removal of OEIB sunset  Priority: 00	Pkg: 102 Reconfiguration of ETIC funding  Priority: 00			
4715 IT Expendable Property						
8000 General Fund	13,486	13,486	-			
<b>SERVICES &amp; SUPPLIES</b>						
8000 General Fund	1,385,937	1,362,476	23,461			
<b>TOTAL SERVICES &amp; SUPPLIES</b>	<b>\$1,385,937</b>	<b>\$1,362,476</b>	<b>\$23,461</b>			
<b>SPECIAL PAYMENTS</b>						
6085 Other Special Payments						
8000 General Fund	(4,706,870)	19,744,404	(24,451,274)			
<b>EXPENDITURES</b>						
8000 General Fund	(230,164)	24,003,513	(24,233,677)			
<b>TOTAL EXPENDITURES</b>	<b>(\$230,164)</b>	<b>\$24,003,513</b>	<b>(\$24,233,677)</b>			
<b>ENDING BALANCE</b>						
8000 General Fund	-	-	-			
<b>TOTAL ENDING BALANCE</b>	<b>-</b>	<b>-</b>	<b>-</b>			
<b>AUTHORIZED POSITIONS</b>						
8150 Class/Unclass Positions	1	-	1			
<b>AUTHORIZED FTE</b>						
8250 Class/Unclass FTE Positions	1.00	-	1.00			
8280 FTE Reconciliation	9.75	9.75	-			
<b>TOTAL AUTHORIZED FTE</b>	<b>10.75</b>	<b>9.75</b>	<b>1.00</b>			

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 REPORT: SUMMARY LIST BY PKG BY SUMMARY XREF  
 AGENCY:52400 OREGON EDUCATION INVESTMENT BD  
 SUMMARY XREF:001-00-00 000 Oregon Education Inv

DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM

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 PICS SYSTEM: BUDGET PREPARATION

PKG	CLASS	COMP	DESCRIPTION	POS CNT	FTE	MOS	AVERAGE RATE	GF SAL	OF SAL	FF SAL	LF SAL	AF SAL
000	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	0.00	3,060				3,060
000	MEAHZ	7016	HA PRINCIPAL EXECUTIVE/MANAGER I	1	1.00	24.00	13,348.00	320,352				320,352
000	MENNZ	0830	AA EXECUTIVE ASSISTANT	1	1.00	24.00	4,305.00	103,320				103,320
000	MENNZ	7010	AA PRINCIPAL EXECUTIVE/MANAGER F	3	3.00	72.00	8,094.66	582,816				582,816
000	MENNZ	7012	AA PRINCIPAL EXECUTIVE/MANAGER G	2	2.00	48.00	10,306.00	494,688				494,688
000	MESNZ	7014	AA PRINCIPAL EXECUTIVE/MANAGER H	1	1.00	24.00	11,362.00	272,688				272,688
000	MMS	X0833	AA SUPV EXECUTIVE ASSISTANT	1	1.00	24.00	5,764.00	138,336				138,336
000	MMS	X7012	AA PRINCIPAL EXECUTIVE/MANAGER G	1	1.00	24.00	10,306.00	247,344				247,344
000	UA	C0119	AA EXECUTIVE SUPPORT SPECIALIST 2	2	2.00	48.00	3,145.00	150,960				150,960
000	UA	C0870	AA OPERATIONS & POLICY ANALYST 1	1	1.00	24.00	4,571.00	109,704				109,704
000	UA	C1117	AA RESEARCH ANALYST 3	2	2.00	48.00	3,973.00	190,704				190,704
000				15	15.00	360.00	4,029.18	2,613,972				2,613,972

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 REPORT: SUMMARY LIST BY PKG BY SUMMARY XREF  
 AGENCY:52400 OREGON EDUCATION INVESTMENT BD  
 SUMMARY XREF:001-00-00 060 Oregon Education Inv

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 PICS SYSTEM: BUDGET PREPARATION

PKG	CLASS	COMP	DESCRIPTION	POS CNT	FTE	MOS	AVERAGE RATE	GF SAL	OF SAL	FF SAL	LF SAL	AF SAL
060	MEAHZ7016	HA	PRINCIPAL EXECUTIVE/MANAGER I		.65-	15.50-	13,348.00	206,894-				206,894-
060	MENNZ0830	AA	EXECUTIVE ASSISTANT		.65-	15.50-	4,305.00	66,727-				66,727-
060	MENNZ7010	AA	PRINCIPAL EXECUTIVE/MANAGER F		1.95-	46.50-	8,094.66	376,401-				376,401-
060	MENNZ7012	AA	PRINCIPAL EXECUTIVE/MANAGER G		1.30-	31.00-	10,306.00	319,486-				319,486-
060	MESNZ7014	AA	PRINCIPAL EXECUTIVE/MANAGER H		.65-	15.50-	11,362.00	176,111-				176,111-
060	MMS X0833	AA	SUPV EXECUTIVE ASSISTANT		.65-	15.50-	5,764.00	89,342-				89,342-
060	MMS X7012	AA	PRINCIPAL EXECUTIVE/MANAGER G		.65-	15.50-	10,306.00	159,743-				159,743-
060	UA C0119	AA	EXECUTIVE SUPPORT SPECIALIST 2		1.30-	31.00-	3,145.00	97,494-				97,494-
060	UA C0870	AA	OPERATIONS & POLICY ANALYST 1		.65-	15.50-	4,571.00	70,850-				70,850-
060	UA C1117	AA	RESEARCH ANALYST 3		1.30-	31.00-	3,973.00	123,162-				123,162-
060					9.75-	232.50-	7,252.53	1,686,210-				1,686,210-

07/30/14 REPORT NO.: PPDELBUDCL  
 REPORT: SUMMARY LIST BY PKG BY SUMMARY XREF  
 AGENCY:52400 OREGON EDUCATION INVESTMENT BD  
 SUMMARY XREF:001-00-00 102 Oregon Education Inv

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PKG	CLASS	COMP	DESCRIPTION	POS CNT	FTE	MOS	AVERAGE RATE	GF SAL	OF SAL	FF SAL	LF SAL	AF SAL
102	MMN	X0863	AA PROGRAM ANALYST 4	1	1.00	24.00	5,492.00	131,808				131,808
102				1	1.00	24.00	5,492.00	131,808				131,808
				16	6.25	151.50	5,721.65	1,059,570				1,059,570
				16	6.25	151.50	5,721.65	1,059,570				1,059,570

07/30/14 REPORT NO.: PPDPLBUDCL  
REPORT: SUMMARY LIST BY PKG BY SUMMARY XREF  
AGENCY:52400 OREGON EDUCATION INVESTMENT BD  
SUMMARY XREF:001-00-00 102 Oregon Education Inv

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PKG	CLASS	COMP	DESCRIPTION	POS CNT	FTE	MOS	AVERAGE RATE	GF SAL	OF SAL	FF SAL	LF SAL	AF SAL
				16	6.25	151.50	5,721.65	1,059,570				1,059,570

07/30/14 REPORT NO.: PPDBLAGYCL  
 REPORT: SUMMARY LIST BY PKG BY AGENCY  
 AGENCY:52400 OREGON EDUCATION INVESTMENT BD

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PKG	CLASS	COMP	DESCRIPTION	POS CNT	FTE	MOS	AVERAGE RATE	GF SAL	OF SAL	FF SAL	LF SAL	AF SAL
000	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	0.00	3,060				3,060
060	MEAHZ	7016	HA PRINCIPAL EXECUTIVE/MANAGER I	1	.35	8.50	13,348.00	113,458				113,458
060	MENNZ	0830	AA EXECUTIVE ASSISTANT	1	.35	8.50	4,305.00	36,593				36,593
060	MENNZ	7010	AA PRINCIPAL EXECUTIVE/MANAGER F	3	1.05	25.50	8,094.66	206,415				206,415
060	MENNZ	7012	AA PRINCIPAL EXECUTIVE/MANAGER G	2	.70	17.00	10,306.00	175,202				175,202
060	MESNZ	7014	AA PRINCIPAL EXECUTIVE/MANAGER H	1	.35	8.50	11,362.00	96,577				96,577
102	MMN	X0863	AA PROGRAM ANALYST 4	1	1.00	24.00	5,492.00	131,808				131,808
060	MMS	X0833	AA SUPV EXECUTIVE ASSISTANT	1	.35	8.50	5,764.00	48,994				48,994
060	MMS	X7012	AA PRINCIPAL EXECUTIVE/MANAGER G	1	.35	8.50	10,306.00	87,601				87,601
060	UA	C0119	AA EXECUTIVE SUPPORT SPECIALIST 2	2	.70	17.00	3,145.00	53,466				53,466
060	UA	C0870	AA OPERATIONS & POLICY ANALYST 1	1	.35	8.50	4,571.00	38,854				38,854
060	UA	C1117	AA RESEARCH ANALYST 3	2	.70	17.00	3,973.00	67,542				67,542
				16	6.25	151.50	5,721.65	1,059,570				1,059,570

07/30/14 REPORT NO.: PPDLGXYCL  
REPORT: SUMMARY LIST BY PKG BY AGENCY  
AGENCY:52400 OREGON EDUCATION INVESTMENT BD

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PKG	CLASS	COMP	DESCRIPTION	POS CNT	FTE	MOS	AVERAGE RATE	GF SAL	OF SAL	FF SAL	LF SAL	AF SAL
				16	6.25	151.50	5,721.65	1,059,570				1,059,570

07/30/14 REPORT NO.: PPDPWSDUD  
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 AGENCY: 52400 OREGON EDUCATION INVESTMENT BD  
 SUMMARY XREF: 001-00-00 060 Oregon Education Inv

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POSITION NUMBER	AUTH NO	ORG STRUC	F POS PKG Y TYP	CLASS COMP	S T POS RNG P	CNT	FTE	BUDGET RATE	MOS	GF SAL	OF SAL	FF SAL	LF SAL	T R K
5240001	001213450	001-01-00-00000	060 0 PF	MEAHZ7016 HA	42X 09	1-	1.00-	13,348.00	24.00-	320,352-				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240001	001213450	001-01-00-00000	060 0 PF	MEAHZ7016 HA	42X 09	1	.35	13,348.00	8.50	113,458				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240002	001213460	001-01-00-00000	060 0 PF	MESNZ7014 AA	40X 09	1-	1.00-	11,362.00	24.00-	272,688-				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240002	001213460	001-01-00-00000	060 0 PF	MESNZ7014 AA	40X 09	1	.35	11,362.00	8.50	96,577				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240003	001213470	001-01-00-00000	060 0 PF	MENNZ7012 AA	38X 09	1-	1.00-	10,306.00	24.00-	247,344-				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240003	001213470	001-01-00-00000	060 0 PF	MENNZ7012 AA	38X 09	1	.35	10,306.00	8.50	87,601				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240004	001213480	001-01-00-00000	060 0 PF	MMS X7012 AA	38X 09	1-	1.00-	10,306.00	24.00-	247,344-				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240004	001213480	001-01-00-00000	060 0 PF	MMS X7012 AA	38X 09	1	.35	10,306.00	8.50	87,601				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240005	001213490	001-01-00-00000	060 0 PF	MENNZ7010 AA	35X 06	1-	1.00-	7,701.00	24.00-	184,824-				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240005	001213490	001-01-00-00000	060 0 PF	MENNZ7010 AA	35X 06	1	.35	7,701.00	8.50	65,459				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240006	001213500	001-01-00-00000	060 0 PF	MENNZ0830 AA	25 03	1-	1.00-	4,305.00	24.00-	103,320-				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240006	001213500	001-01-00-00000	060 0 PF	MENNZ0830 AA	25 03	1	.35	4,305.00	8.50	36,593				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240007	001213510	001-01-00-00000	060 0 PF	MMS X0833 AA	26 08	1-	1.00-	5,764.00	24.00-	138,336-				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240007	001213510	001-01-00-00000	060 0 PF	MMS X0833 AA	26 08	1	.35	5,764.00	8.50	48,994				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240009	001213530	001-01-00-00000	060 0 PF	MENNZ7010 AA	35X 07	1-	1.00-	8,087.00	24.00-	194,088-				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240009	001213530	001-01-00-00000	060 0 PF	MENNZ7010 AA	35X 07	1	.35	8,087.00	8.50	68,740				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														

07/30/14 REPORT NO.: PPDPLWSBUD  
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POSITION NUMBER	AUTH NO	ORG STRUC	F POS PKG Y TYP	CLASS .COMP	RNG P	S T POS CNT	FTE	BUDGET RATE	MOS	GF SAL	OF SAL	FF SAL	LF SAL	T R K
5240010	001213540	001-01-00-00000	060 0 PF	MENNZ7012 AA	38X 09	1-	1.00-	10,306.00	24.00-	247,344-				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240010	001213540	001-01-00-00000	060 0 PP	MENNZ7012 AA	38X 09	1	.35	10,306.00	8.50	87,601				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240011	001213550	001-01-00-00000	060 0 PF	UA C0119 AA	19 03	1-	1.00-	2,999.00	24.00-	71,976-				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240011	001213550	001-01-00-00000	060 0 PP	UA C0119 AA	19 03	1	.35	2,999.00	8.50	25,492				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240012	001226140	001-01-00-00000	060 0 PF	UA C0119 AA	19 05	1-	1.00-	3,291.00	24.00-	78,984-				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240012	001226140	001-01-00-00000	060 0 PP	UA C0119 AA	19 05	1	.35	3,291.00	8.50	27,974				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240014	001213710	001-01-00-00000	060 0 PF	UA C1117 AA	26 02	1-	1.00-	3,973.00	24.00-	95,352-				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240014	001213710	001-01-00-00000	060 0 PP	UA C1117 AA	26 02	1	.35	3,973.00	8.50	33,771				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240015	001213720	001-01-00-00000	060 0 PF	UA C1117 AA	26 02	1-	1.00-	3,973.00	24.00-	95,352-				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240015	001213720	001-01-00-00000	060 0 PP	UA C1117 AA	26 02	1	.35	3,973.00	8.50	33,771				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240020	001226150	001-01-00-00000	060 0 PF	UA C0870 AA	23 08	1-	1.00-	4,571.00	24.00-	109,704-				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240020	001226150	001-01-00-00000	060 0 PP	UA C0870 AA	23 08	1	.35	4,571.00	8.50	38,854				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240021	001226160	001-01-00-00000	060 0 PF	MENNZ7010 AA	35X 08	1-	1.00-	8,496.00	24.00-	203,904-				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
5240021	001226160	001-01-00-00000	060 0 PP	MENNZ7010 AA	35X 08	1	.35	8,496.00	8.50	72,216				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
							060	9.75-	232.50-	1,686,210-				

07/30/14 REPORT NO.: PPDELWSBUD  
 REPORT: DETAIL LISTING BY SUMMARY XREF AGENCY  
 AGENCY: 52400 OREGON EDUCATION INVESTMENT BD  
 SUMMARY XREF: 001-00-00 102 Oregon Education Inv

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POSITION NUMBER	AUTH NO	ORG STRUC	F POS PKG Y TYP	CLASS COMP	S T POS RNG P	CNT	FTE	BUDGET RATE	MOS	GF SAL	OF SAL	FF SAL	LF SAL	T R K
5240022	001244960	001-01-00-00000	102 0 PF	MMN X0863 AA	31 02	1	1.00	5,492.00	24.00	131,808				
EST DATE: 2015/07/01 EXP DATE: 9999/01/01														
			102			1	1.00		24.00	131,808				
						1	8.75-		208.50-	1,554,402-				
						1	8.75-		208.50-	1,554,402-				





## Engineering and Technology Industry Council FY15 Funding Allocation Recommendation

Draft to be approved by ETIC 9/5/14 and submitted for OEIB approval 9/9/14.

### 2013 Legislative Assembly, HB5031-A, 2013-15 Approved Budget OUS Engineering Technology and Industry Council (ETIC) \$29,030,827

ETIC 2013-2015 Allocation	\$29,030,827
FY14	\$14,225,105
<b>FY15</b>	<b>\$14,805,722</b>

FY15 ETIC Recommended Allocations	Sustaining	Renewable	Total
OUS/Eastern Oregon University	175,480	0	175,480
OUS/Oregon Institute of Technology	539,532	352,763	892,295
OUS/Southern Oregon University	204,418	0	204,418
OUS/Western Oregon University	288,545	0	288,545
Oregon Health and Science University	0	330,000	330,000
Oregon State University	7,498,884	568,673	8,067,557
Portland State University	2,924,844	576,856	3,501,700
University of Oregon	0	1,299,109	1,299,109
Unallocated		46,618	46,618
<b>TOTAL</b>	<b>\$11,631,703</b>	<b>\$3,174,019</b>	<b>\$14,805,722</b>

### Purpose of ETIC Fund (from ORS 351.663 as amended in 2014):

*The Engineering and Technology Industry Council is established. A majority of the council members are representatives of high technology companies in Oregon. The council shall be consulted on the work plans and resource allocations for engineering education.*

*(2) The council shall establish criteria and measurements that will be used for determining investments made from the account established under section 5 of this 2014 Act*

*(3) The criteria and measurements established by the council shall include:*

*(a) Responding to the urgent engineering educational needs of Oregon's fast growing high technology industry.*

*(b) Increasing this state's faculty and program capacity to meet the graduate level, professional education needs of engineers working in Oregon's high technology industry through investments in public and private institutions.*

*(c) Creating additional opportunities for Oregonians to pursue education in electrical engineering, computer engineering and other engineering disciplines critical to the advancement of Oregon's high technology industry.*

*(d) Investing relatively scarce state financial resources to:*

*(A) Address the high technology industry's most demonstrated and pressing needs;*

*(B) Produce the greatest amount of educational benefits with the least short- and long-term costs to the public;*

*(C) Avoid duplicating existing public or private resources; and*

*(D) Leverage existing and future private resources for the public benefit.*

## ETIC FY15 Sustaining Funds

These funds are for existing programs initiated under ETIC during past biennia that qualify for sustaining funding. Funds are explicitly directed to continue the progress towards ETIC goals of 2x graduates and 5x external research dollars within disciplines meeting ETIC's core mission.

To qualify as a sustaining program, the funds must be for on-going faculty support that cannot be removed without jeopardizing graduate production; used solely for qualifying disciplines including computer science, electrical engineering, computer engineering and other engineering disciplines as identified by the ETIC council; and be a follow-on of ETIC programs funded prior to 2012.

## ETIC FY15 Renewable Fund Awards

OHSU	2015-02	Dorsa/Quantitative Bioscience & Biomedical Engineering	330,000
OIT	2014-07	Aboy/New Program Development & Capacity Increases for High-Demand Engineering & Technology Degrees	236,093
OIT	2014-08	Chiasson/Grid Integration of Renewable Energy Sources	50,000
OIT*	2014-11	Rytkonen/Oregon Power Engineering Education Project	66,667
OSU	2014-09	Stone/Graduate Program in Robotics	292,000
OSU*	2014-11	Cotilla-Sanchez/Oregon Power Engineering Education Project	66,667
OSU*	2015-01	Fiez/Oregon Cybersecurity Consortium	60,000
OSU	2015-05	Jensen/Center for Systems and Software Evolution	150,003
PSU	2014-01	Harrison/New Beginnings Initiative: Helping College Graduates Migrate to Careers in Computing	195,000
PSU*	2014-11	Bass/Oregon Power Engineering Education Project	66,667
PSU*	2015-01	Feng/Oregon Cybersecurity Consortium	60,000
PSU	2015-08	Harrison/Educational Outreach to the Columbia Gorge	59,049
PSU	2015-10	McNames/Oregon Center for Interconnected Devices	167,696
PSU	2015-11	Campbell/Project-Based Radio Frequency Analog Education	28,441
UO	2014-10	Berglund/Graduate Internship Program in Bioinformatics and 'Big Data' Genomics	110,000
UO*	2015-01	Butler/Oregon Cybersecurity Consortium	60,000
UO	2015-13	Berglund/ETIC FY15 Renewable Year Two	1,129,109

\*indicates collaborative proposal with other universities

\$3,127,392



Ms. Irwin double majored in journalism and mass communications and in political science at Arizona State University. She began her career as a journalist in Phoenix, Arizona, focusing on issues related to children, families, and immigrants. As part of a team, she is a two-time winner of the Payne Award for Ethics in Journalism and has also received multiple Arizona Press Club awards for her coverage of vulnerable children and families in the Phoenix-metro area. Ms. Irwin has also worked in education advocacy, overseeing community organizing and family engagement programs in 11 states. She is the proud daughter of two public school teachers.

Dear Members of the Education Investment Board,

As a parent of a fourteen year old son with autism and as a teacher with a Master's degree in Special Education, I'm passionate about early childhood intervention. My son received outstanding services when we lived in Napa, California through the Napa Preschool Program. The services he received included the following: 1) one-on-one direct instruction in speech therapy 2) one-on-one direct instruction in occupational therapy 3) parent training to support 1 and 2 at home. Because of these outstanding services delivered by caring and competent professionals, my son has been able to thrive here in the Oregon public schools. That early investment (of both time and money) most certainly benefited my son and our entire family.

Unfortunately, my experiences with early intervention services in Oregon as a preschool teacher have been disheartening to say the least. Last year I had a delightful boy with Down's syndrome in my pre-k class at a small private preschool in Bend. I witnessed first-hand the bureaucratic farce that they call early intervention. This child desperately needed speech and occupational therapies but received neither. Instead the speech therapist came and visited him in our classroom a few times. No occupational therapy was given; all they did was give us a pair of modified scissors for him to use. Other "team" members visited to criticize and scrutinize my teaching and offer "helpful hints". They told me to carry this child from place to place!

I informed the team of concrete ways to help in the classroom ( e.g. Take the boy to the bathroom, preview the next letter in his alphabet book, work with him on activities to strengthen his fingers and hands-- stamps, stickers, play-dough, etc.-- but they made it clear that they were not there to take suggestions from me).

As a taxpayer and a teacher, all I could think was: What a waste of money, time, and resources! Why are these professionals driving from preschool to preschool just to visit and document? Why are they allowed to disrupt my teaching and disrespect me just because I'm a preschool teacher? Why do they add to my workload and stress when I make only \$14 an hour and they make much more?

I would really like to be a part of the effort to improve early intervention services in Oregon. I realize California has more money to spend on this than our state but, from what I experienced last year, money is not the issue. There are way too many cooks stirring the broth. Speech and occupational therapists need to be front and center (cut out the others who just visit and document) and build that connection between those professionals and the parents. Most parents want to be involved and they are the key to success. The early intervention program in Bend has the philosophy of bypassing the parents and putting the entire burden on the classroom teacher all in the name of inclusion.

Inclusion should not mean that the "team" sits back, observes, and criticizes. Inclusion should not mean that one-on-one speech and occupational services are not delivered. Inclusion should not mean that the classroom teacher and the other students are expected to continuously accommodate the child with special needs and tolerate his disruptive behavior like hitting and pushing. Inclusion should not be used as a way of delivering early intervention services " on the cheap".

As you can gather, I feel very passionate about this issue. Please let me know how I can help to bring quality early intervention services to Oregon.

Sincerely,  
Nancy Mitchell

**Dave Porter**  
**1113 SE Cora Street**  
**Portland, Oregon 97202**

8/29/14

Dear members of the Oregon Education Investment Board,

Please make international education, especially more dual language immersion programs and paid high school study abroad learning opportunities in Oregon's K-12 system, an investment priority equal to STEM education. Please recognize that we live in an era of radical global changes and that we need to adapt our educational system to prepare our next generations for these new global challenges. Let me cite three recent examples of the radical global changes taking place.

First, some states, like Utah, are ahead of Oregon in developing a multilingual workforce as a competitive economic advantage in the global economy. Utah has more dual language immersion programs in more economically strategic languages than Oregon. Consider the following chart.

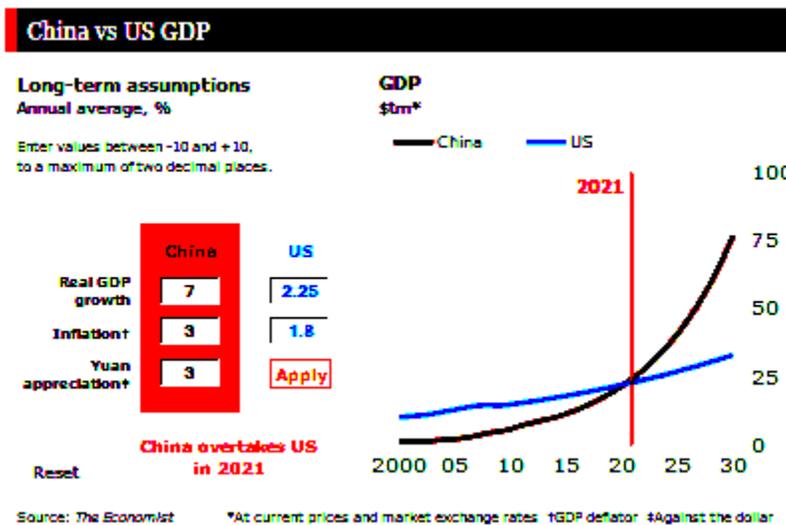
<b>Dual Language Immersion programs</b>		
<b>Elementary school level</b>		
<b>Fall 2014</b>		
	<b>Utah</b>	<b>Oregon</b>
<b>Spanish</b>	<b>54</b>	<b>49</b>
<b>Mandarin</b>	<b>31</b>	<b>3</b>
<b>French</b>	<b>13</b>	<b>2</b>
<b>Portuguese</b>	<b>6</b>	<b>0</b>
<b>German</b>	<b>2</b>	<b>0</b>
<b>Japanese</b>	<b>0</b>	<b>2</b>
<b>Russian</b>	<b>0</b>	<b>2</b>
<b>Vietnamese</b>	<b>0</b>	<b>1</b>
<b>Total</b>	<b>106</b>	<b>59</b>
<b>Total Statewide</b>		
<b>Enrollment 2013</b>	<b>595,799</b>	<b>567,100</b>

Second, in its 8/22/14 issue, the Economist magazine updates in prediction for when China's GDP will surpass that of the US. They write:

American growth has been a little lower than expected but inflation a bit higher, making that side of the projection quite accurate. The margin of error was bound to be larger with China,

given the speed at which it has been developing. We were nearly spot-on with our growth forecast, though are now revising down our expectation for the remainder of the decade to a 7% average annual pace as the economy matures. The bigger surprise has been the halt of yuan appreciation this year—a policy dictated by the government, not the market—and the sharp drop in inflation as producer prices have fallen. A yawning trade surplus still points to a stronger yuan, so we maintain our forecast for sustained appreciation, though expect the upward march to come in fits and starts. As for inflation, excess industrial capacity remains a drag but is gradually being worked out of the system; we nudge our forecast down to 3%.

We have plugged our expectations into the chart above (updated August 22nd 2014) as the default assumptions. Totting it all up, we now see 2021 as the year of China's re-emergence as world's biggest economy.



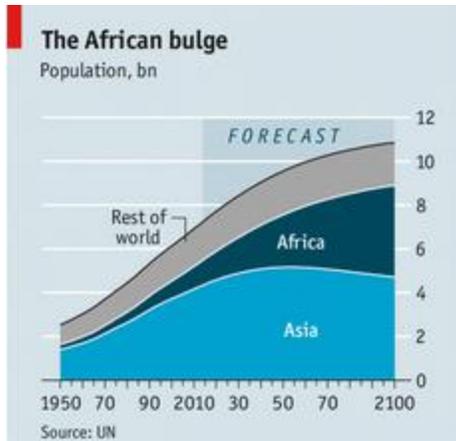
Note China's possible growth after 2021.

Third, from the same issue of the Economist:

A new study by Unicef, the UN children's agency, points out that, by 2100, on current rates, almost half the children under 18 in the world will be African. At the moment, the share is only a quarter.

This would be one of the most dramatic demographic shifts in history. By the end of the century, if current demographic patterns continue for another 85 years (which they may not), Africa would have 4.2 billion people, against 1.1 billion today. Nigeria, whose land mass is similar to Pakistan's or Venezuela's, would rise from 180m today to 910m, registering one in 12 of the world's births.

"The future of humanity is increasingly African," says Unicef's report, which shows a "massive shift in the world's child population towards Africa".



This is the world today's student will inhabit.

Thank you.

Respectfully - Dave Porter

Testimony for OEIB Board Meeting  
From Pat Muller [zettybobo@mac.com](mailto:zettybobo@mac.com) Oregon Save Our Schools  
ELL Teacher McMinnville School District

I took the liberty of sending out a survey to all of the Title III Directors listed on the contact sheet on the Oregon Department of Education Website. These are the people who are in charge of the ELL programs at the district level. An anonymous survey gives them the opportunity to express their opinions in a secure manner. As of the writing of this testimony on September 7<sup>th</sup>, there are 83 responses in the four days that the survey has been open. I will leave it open in case any more people have some good ideas.

Imagine that, it was fairly easy to get the feedback of educators; something the OEIB with all of its staff and resources was unable or unwilling to do. I put myself at your disposal if you would like to get educator opinions in the future. I would hate to succumb to a conspiracy theory that is running around in my head, that this whole thing is a sham and that the committee really doesn't **want** to facilitate feedback from educators. You can disprove this suspicion by taking some of this feedback into account and modifying the proposal, instead of only taking the advice from organizations such as the Oregon Business Association, Stand for Children, Chalkboard Project and other corporate education reformers.

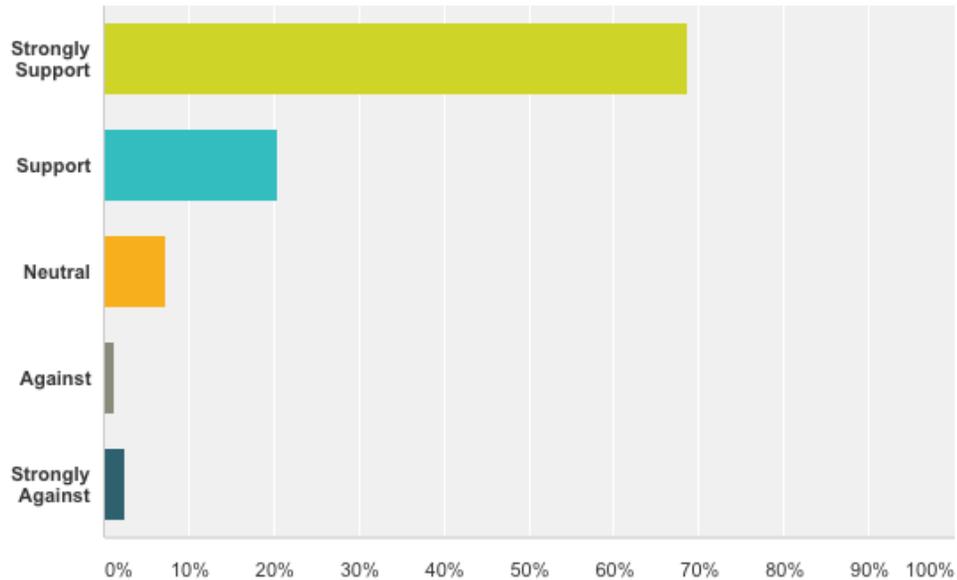
I'm hoping that committee member Hanna Vaandering gets the research she asked for at the last subcommittee meeting. Who were the educators that developed these proposals and where is the research showing that similar proposals have been successful?

The questions from the survey were taken from the powerpoint originally presented to this committee. The questions ask for a rating on each of the items and there was an open comment box at the end. I will present the graph of responses and all of the comments received, even those I don't agree with! You can come to your own conclusions, but they will hopefully be informed conclusions.

Sorry for the cut and paste and formatting challenges. I am an unpaid volunteer who also teaches full-time. Comments were not edited for spelling or other errors.

## Item 1: Districts claim an extra .6 (increase from .5) for ELL students

Answered: 83 Skipped: 0



**We of course could use more money to help ELL students. During the recession or “jobless recovery” period, workloads have increased along with expectations. Then educators are attacked for not meeting these expectations. Whenever the committee uses the word “leverage” I think cattle prod. Let’s “tighten” the noose and drive the final nail into the coffin. I laughed when I heard the term, “tight, tight, loose”. Let’s just admit, there is no loose in a high-stakes environment.**

Public Charter Schools providing their own ELL should receive 100% of the weight for ELL students!

There is a commitment, especially in small rural districts, to do whatever it takes to get ELL kids all the way through to graduation. This commitment requires resources in order to keep abreast of civil rights, teaching techniques, staffing etc...

Where is the additional .1 coming from? If it is decreasing the amount for all students, I am not in favor. I believe the issue is how districts allocate the weighted funding, NOT the amount of the weighted funding. In my opinion, .5 is sufficient if it could come with the requirement that it be spent on staff, resources, etc. that met the specific needs of English learners.

The new ELP standards extend into the gen ed classroom. this will be a challenge at the secondary level to support without additional staff resources.

Where is this additional funding coming from? Is it taking money from another weight funded group?

District should be required to distribute ELL funds to buildings based on ELL enrollments. More ELL kids ina building more funds.

Services and resources for students is very expensive - additional staff has worked extremely well for us, but the cost for staff is very high.

Depends. Will the extra funding for ELL students take away from funding schools receive in another category?

As our numbers decrease it becomes more difficult to maintain the level of services with the .5 funding. Any increase would be welcomed.

This would be welcome, but only if the funding is "new" money--as opposed to a re-shuffling of existing funds.

Is there any consideration of moving the years from 5 to 6 years in order to reach an ELPA 5. Studies show that it takes 5 to 7 years to reach proficiency.

The state and federal requirements for serving ELs have increased considerably over the 14 years I have been working with them, yet funding has not changed. This increase would be instrumental in helping districts address these increased demands.

You might consider an even higher amount for students in their first year. Newcomers require much more attention than students with experience in the US education system.

Of course more funding would be good. I worry about the strings that might be attached to the increased funding.

.5 is enough.....keep the money in the base and schools can decide how to invest.

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You are looking at this as if you have any idea how much it actually costs educate a student. This is all just a guess. I think more money is just a way of saying you have done something. It doesn't get at the real issues.

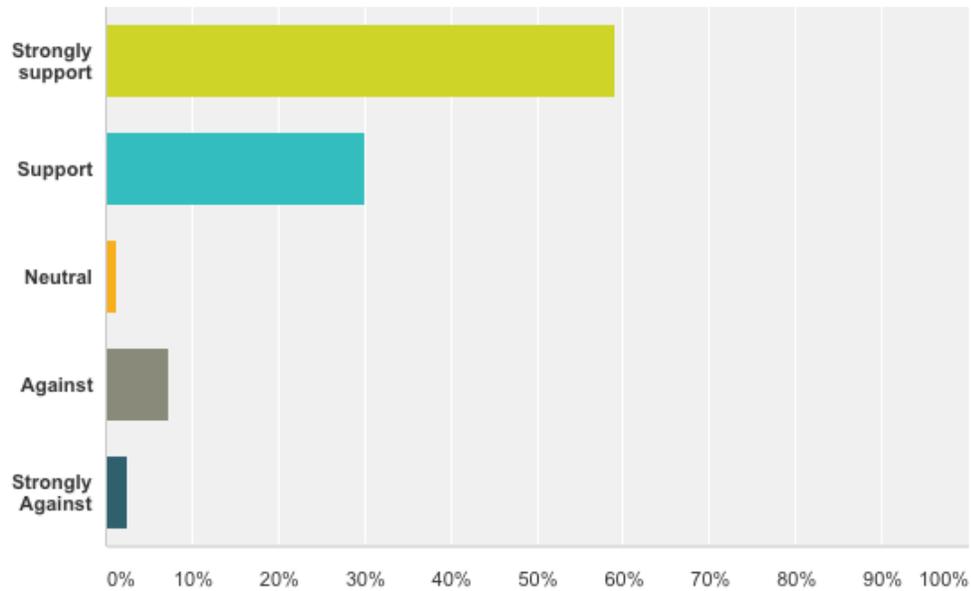
The outcomes necessary for students with the dollars currently funded is difficult. The smaller the district ell population the less efficient the resource.

Stipulations?

Consider a higher value for districts with total enrollments under 1000 to fully fund a proper ELL program. A tiered system based on total enrollment as one factor and a secondary tier for ELL population. This will ensure equity across the system.

**Item 2: Districts can receive the additional weight for 7 years for students initially identified at a Level 1 or 2 by the English Language Proficiency Assessment (ELPA).**

Answered: 83 Skipped: 0



**I won't bore the committee with the research that shows how long a student needs to learn a second language. That research has been consistently ignored, especially when the pressure to meet AMAO targets require a student to move up one level per year to meet the targets, and districts are dinged for not moving them forward fast enough. We must not be using that money wisely, or we might be spending it to install leather couches in the teacher staff room as teachers aren't working hard enough to make it happen and have a lot of time to spend in there. Of course people would be in favor of a longer funding time, but what about the strings attached? I really liked the comment that would rather have the .5 instead of an expiring .6.**

What would happen after the 7 years if the student is still enrolled in the ELL Pgm.? Are there any other implications? What would happen after the 7 years if the student is still enrolled in the ELL Pgm.? On the other hand, having a more stable funding source, would allow for better planning and services.

Most students entering the school system as a 1-2 level will need extra time to succeed with academic language, and their classes.

My concern here is that some highly impacted students with significant cognitive challenges who are dual identified in

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special ed and ELL struggle with meeting exit criteria. While it is not a large percentage or number of students it is a group that requires lots of specialized support. Currently, ODE has not provided sufficient guidance regarding the identification and progress monitoring and exit options for this subgroup - which, once identified will remain in program until graduation.

These students need additional support to access academic content as they are still learning basic language/social language.

I love the funding formula. Since ELPA does not provide initial identification function, using ELPA to determine student level for funding is problematic at this time.

Research shows that 7 years is a typical period of time to become proficient in a second language.

ELPA is not used to identify students, so I do not understand this statement. I am interpreting this as schools can ONLY receive the money for 7 years as it is assumed a student should exit after 7 years. Some students need more time. There are a variety of circumstances that result in a student needing more time such as inconsistencies in education, lack of proper ELD instruction, lack of teacher training, mobility, etc.

For some students, seven years may not be long enough for them to be at the level where they do not need additional help.

See above comment. Students and families who come in to our district at a Level 1 or 2 require quite a bit of help, both during the instructional day and through extra parent support systems.

These students often take double the resources in the beginning to move them to level 3 or above.

Most students exit EL programs in Oregon in less than 7 years, but some do not. There are several reasons, including learning disabilities, significant emotional trauma related to poverty, poor nutrition and inadequate health care, roadblocks in the acculturation process for students and their family members, and gaps in formal education due to poor attendance and high mobility. Long-term ELs need a specialized approach, intensive (sometimes individualized) instruction, and additional resources. Taking away the funding does nothing to address those needs, but would only force schools to either rob funds from instruction for students who have been in the program for less than 7 years, or water down their EL support for long term ELs--removing any hope of their exit from the EL program.

Yes! Read number #1 response of mine.

Research shows that students with special needs take 7-9 years to reach proficiency. Additionally, migrant students who are ELs often have disrupted education. Some students in our district miss a lot of school each year and keeps them from climbing levels.

I am assuming this means if we have a student in services for year 8 we would not receive funding. My fear is that if funding is cut off, there would be pressure to remove these students from services. For many of these Long Term ELs determining their academic needs is extremely difficult, including justifying keeping them in (or exiting them from) EL services. Will there be regulations in place to address this issue?

While I strongly agree with this, you might also consider graduated funding. For example, 1.0 for year 1, 0.9 for year 2, 0.8 for year 3, etc., or a more complicated graduated formula based on years in US and proficiency level.

What happens if the student needs ELL services longer? Again, you are approaching this as if money could solve the issues we have in this state.

Not sure if this means the weight ends after seven years... If that is the case... no... I would rather collect .5 as long as they are eligible than have a slightly higher amount for a limited period. Unless the .5 is still available for the duration of eligibility.

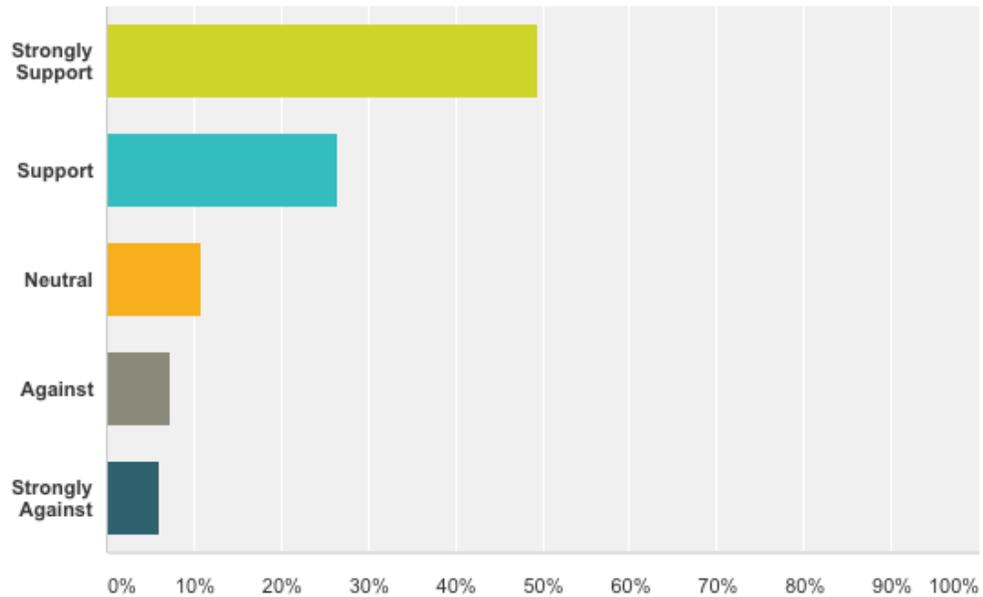
A nice plan for consistent money with an accountability goal/outcome of 7 years.

It needs to continue beyond 7 years.

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### Item 3: The extra weight is claimed for 4 years for Level 3 or 4 students.

Answered: 83 Skipped: 0



**Imagine a mindset where the students' needs are put first and not put on a timer like hard-boiling an egg. It would be a good idea for districts to test their new kindergarten students on the first day of school to make sure they do poorly to get the full 7 years of funding! We could use this extra money to give to the long-term students at the secondary level who would no longer be funded under the proposal. But at least it would provide additional money for services after the students have been exited from the ELL program, in acknowledgement that help is needed during the 2-year monitoring period or beyond.**

Same question/comment as above? What would happen after the 7 years if the student is still enrolled in the ELL Pgm.? Are there any other implications?

Seems reasonable.

With the increased academic standards, this sub group is one that is at great risk of not achieving and graduating.

I am against assuming this indicates districts would ONLY receive the funding for 4 years for a level 3 or 4 regardless if the student exits within the 4 years.

Should remain at 7 year for claiming.

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As stated for number 2, this may not be a lengthy enough period for these students to then not receive additional services.

These students still receive extra support during the instructional day, so extra support would be helpful.

Many students who are dual identified, ELL & SPED require more support. The research is clear that these dual identified student take additional years to become proficient in English (9 years). Given that these are our most challenging, as they have multiple barriers, I would highly recommend that they continue to receive funding for the length of time needed to move to an English proficient level.

I would echo my earlier comments. Most students easily progress beyond a level 3 within 4 years. However, some don't for a variety of reasons having to do with limited formal schooling prior to entering the US, PTS related to refugee experience, and learning disabilities (sometimes unidentified/ impossible to identify due to limited formal schooling outside the US). Other students suffer from the effects of sever poverty and interrupted schooling within the US. If they are to be effective, schools must have the tools and funding necessary to support these toughest cases.

Please see comments above

Again, this would allow for a gradual release support system versus a cut off of services the minute the student exits.

While I strongly agree with this, you might also consider graduated funding. For example, 1.0 for year 1, 0.9 for year 2, 0.8 for year 3, etc., or a more complicated graduated formula based on years in US and proficiency level.

I don't really understand this concept. Typically students who get stuck at 3 or 4 are there because of learning or environmental challenges.

Even if the student is ready to Exit? When are we going to deal with the real issues? We need to tackle what is happening in the general education classrooms, not in ELL. This all seems very surface level, and isn't addressing what matters.

The extra .5 weight for the duration of eligibility is currently fine. Not sure this whole thing needs any change.

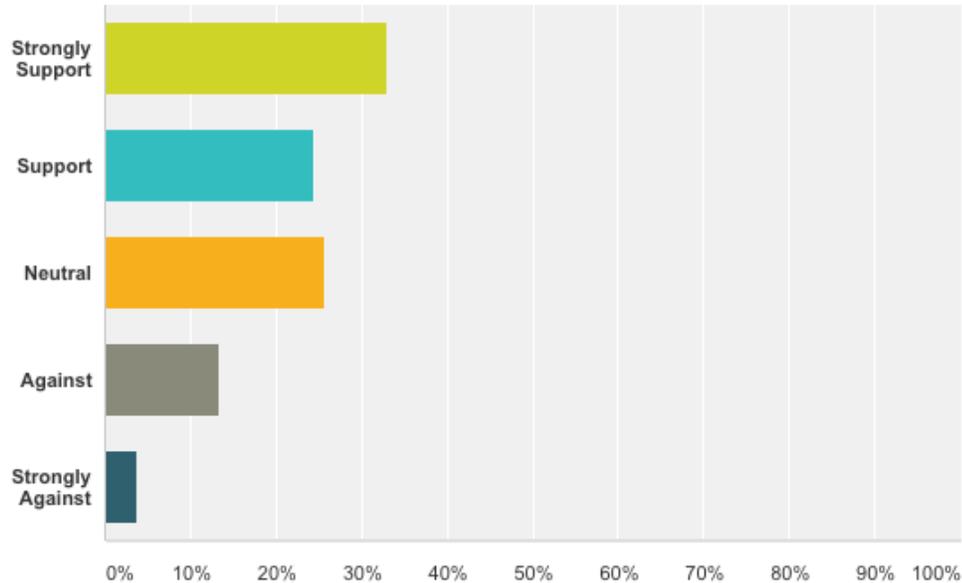
Good idea. They hopefully need less time to become proficient.

Level 3/4 based on what-ELPA? That's a lot of wright placed on one test. Too many potential inaccuracies.

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#### Item 4: Extra weight is claimed even if the student becomes proficient in English and exits the program in fewer than the 7 years.

Answered: 82 Skipped: 1



**As a stand-alone, this idea is great. It could be re-worded to say that ELL students will continue to receive the .5 for 2 years, regardless of time spent in the program.**

This could apply to our monitor students as they continue to need support and the current funding does not allow for this.

This addresses the needs of newly monitored students who still need additional content specific support during the first couple of years of transition out of the ELL program.

If the student is success, the support needed should reduce.

The language gap will remain even if an ELL is reclassified from focused language study and continued support will ensure that former ELLs receive academic support to be successful. All teachers must have the opportunities to learn how to address the language needs of former ELLs when these students no longer receive ESL services.

Lovely idea to reward districts who do well quickly

Extra weight should only be claimed for the duration of the time the student is in the program, regardless of how long it takes him/her to be proficient enough to exit the program.

We monitor these students and continue to provide school-to-home service, so extra support could be helpful. Again, I worry where the funds will come from and whether or not other critical programs and services will be affected as a result of increased funding here.

While ELLs may become proficient in English, they still require monitoring and often times extra interventions to support

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them as they access content.

We do not receive funding for the students who are on monitor status but we still have to provide other services to their families such as translations, as well as monitor their progress which takes time away from the funded students.

This would support those students who are in year one and year two of monitoring status.

If the purpose of additional ADMw is to provide funding to support students who need specialized English classes, then basing the formula for that funding, at least in part, on students who no longer need the specialized classes doesn't make much sense. What other program is funded this way? Following this logic, shouldn't schools continue to receive ADMw for any students who graduate early?

We often need to provide extra interventions and homework support as these students typically do not have support in the home for rigorous courses. Becoming proficient doesn't mean they won't struggle with higher level academic course work.

We currently have no funding to support ELs when they exit. Many struggle to find success, but our support system is a cliff where services are cut off as soon as a student exits. This change would allow us to provide a gradual re-entry system including sheltered courses designed specifically for ELs .

In addition, you might consider funding bonuses to districts for students who exit early.

This supports the fact that even though our students exit the program they continue to need support to be successful in higher level classes.

Not necessary. When a child no longer needs a service, we shouldn't be able to claim extra money for them. There are too many needs for the good of the whole student populace.

Creates a more stable long term funding structure.

The extra money can be used to help fund a program to monitor students. Currently, there is not enough finding to make true monitoring if exited students a reality.

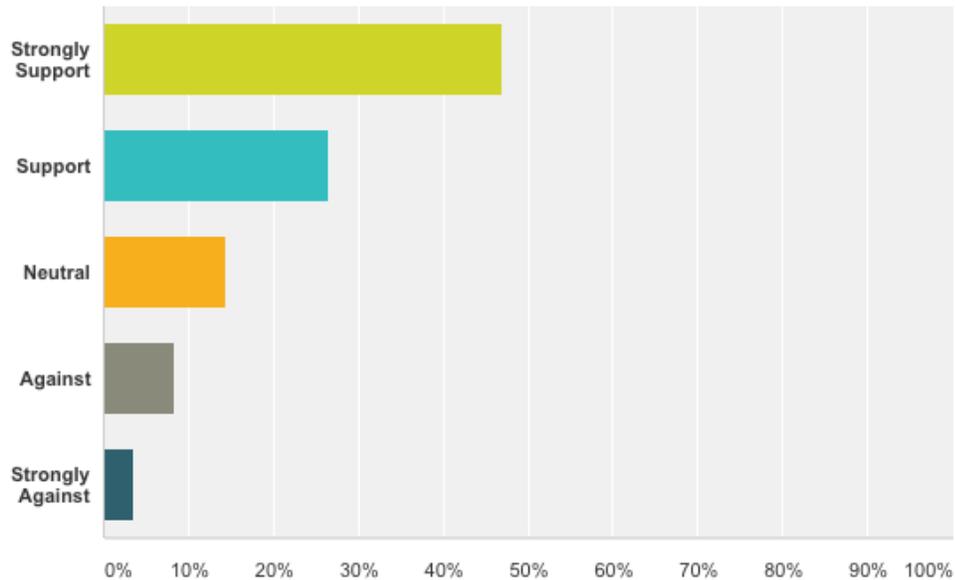
No

5 years is better to be able to maintain funding levels. Though most people will gladly take the money for longer.

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**Item 5: Districts are required to spend a minimum of 90% of the extra weight on ELL students.**

Answered: 83 Skipped: 0



**I'm seeing concern here about how time consuming the enforcement provision would be but also a desire to get the money to help the students. It's clear the directors want more money for their programs. I've heard that COSA is against this. But look at the results. Are Title III Directors members of COSA? Help me to understand if they are indeed members, why wouldn't their opinions be represented by their professional organization? I think this issue needs to be separated from the rest of the package and dealt with in a more thorough manner, with direct input from the directors.**

This would allow for more instructional support for our ELs (additional instructional aides, some after school support/curriculum/materials).

This is the critical element that needs to be addressed. The .5 added weight is currently a funding formula and not a spending formula. Simply adding spending parameters will make a significant difference to the resources available to address the academic needs of ELLs.

why not !00%?

We have to be careful how this is measured. they tap into a number of resources not just an ELL teacher; ELL assistants, counselors, gen ed classroom teacher, principal-parent meetings needed, etc. should be 'counted' as going towards the support of ELL students.

The ELLs are at risk of failing in our schools. The 90% minimum will send the message that less than 100% is OK, when ELLs need more than just this amount. While the new funding formula will be of a great support, the 90% will weaken the intent and the impact of additional funding. If we are serious about the support, why

not require 100%? Do we require 90% for any other student population? If we don't, such a requirement for ELLs would be inequitable. If our goal is equitable funding for all students and if we are serious about graduating 100% of our students, 100% should be the requirement.

If the basis for this takes into consideration the staffing needs and does not require redundant tracking or obsessive monitoring.

Every district spends their money differently for various reasons. Perhaps and MOE, such as in Special Education, would be a better option.

More information would be needed in order to answer this. Can the funding be used for supplies, PD, staff, etc., that is only used for ELL students. This type of funding, which Title 1A is requiring, is VERY negative to the overall atmosphere of the school. The focus should be ELL students, but not allowing teachers and TAs to work with nonELL students (even though their funding is from the additional ELL funds) creates a situation where parents and students do not understand the reasoning. Supplies and staff should be targeted toward ELL students, but not restricted to them.

This could be problematic, depending on how it is defined. There's no question that "spending tied to students" should include whatever costs are associated with instructional and program support, but increased administrative costs must be factored in as well. This is especially true in small districts where each administrator's duties are stretched to the limit.

I strongly believe that dollars generated by our ELL students should be spent on this population. We are all working hard to close the achievement gap and when the extra weight is used to balance the budget, at the district level, this totally defeats the purpose of the extra weighting.

You need to work with teachers/staff to determine what qualifies as spending on students.

" On ELL Students" needs to be defined for the Required aspect.

Rather than tracking \$\$ which is sometimes difficult as positions maybe split between several duties. I would prefer to measure outcomes for our ELLs and Ever ELLs.

It is extremely difficult to run a district-wide EL program with limited funding. If the money is earmarked for EL students, it should go to EL students. What would be helpful, in addition to this mandatory %, is parameters as to what it means to spend the money on ELs. For example, does this include FTE for an ELA teacher at the high school to teach a sheltered class to reduce class size so it can be half ELs? Does this include FTE for an intervention math class for non-math literate 9th graders who happen to be mostly ELs? Does this include a literacy teacher for middle school students arriving from refugee camps with little to no formal schooling? We are struggling with refugees arriving with little to no formal schooling at the 5th grade and above level, how best to and who should educate them, and what source of funds to provide the support they need.

I am concerned as to how this would be measured. Part of the support for ELLs is the content instruction they receive in their reading, English, math, science, and social studies classrooms. I believe that there should be a way of recognizing that support as part of the funding and support provided to ELLs in terms of Sheltered Instruction and using appropriate ELD strategies for content area support in regular classrooms.

Yes!!! I more than strongly support this proposal. This was one of the biggest weaknesses in way weighted funding has been. I understand that ELLs put a strain on the whole school system, but the emphasis of this funding should be on English language development.

While this would be ideal, in my small district EL students are served in some way in every classroom and the .5 funds are not currently spent only on EL students, I believe this type of requirement would create animosity. I would be in favor of a smaller %tage required to be spent on EL students.

I would like to see 100%.

Why would you require a district to spend money if the subgroup is performing well? This is micromanaging. It should be based on what is needed to help this subgroup perform, not a dollar amount!

This is critical. The weighted formula needs to change from a funding formula to an expenditure formula with accountability.

That makes sense

How would this actually be determined? Is it correct to assume that things like ESOL specialists and/or bilingual educational assistants' salaries and professional development directly related to ESOL would be considered spending on ELL students?

Need to ensure that the money is getting directly to students.

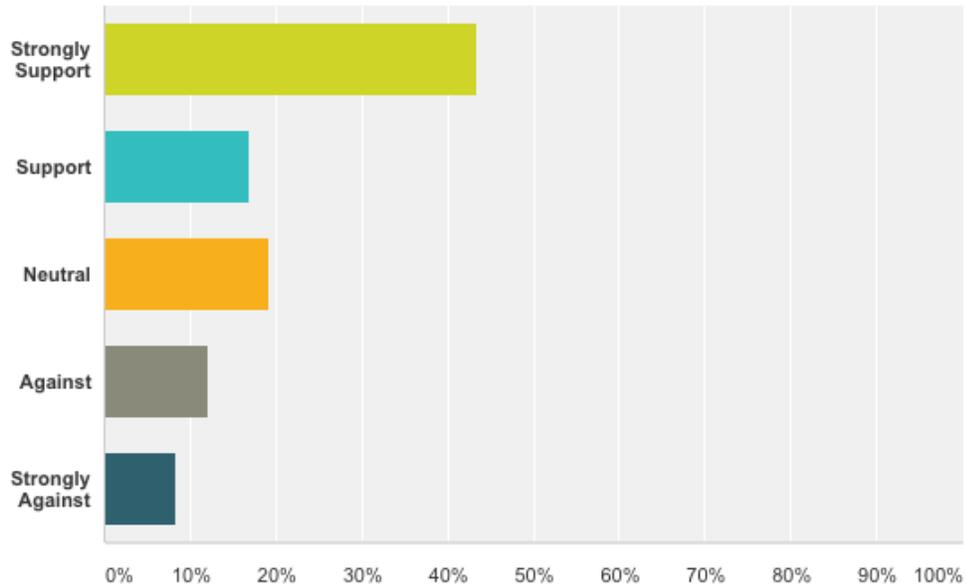
Districts need flexibility in how monies are used. I think most districts do there best to spend the money where it is needed to best support ELL students. We don't need more regulation.

ELL funding should be spent on the students-period.

In smaller districts this money could also be used to support the overall educational program which could benefit all students. I worry that too many restrictions will force smaller districts not to go after Title III funds all together. 75% would be a better number...districts still could spend more.

### Item 6: Districts receive an additional \$250 incentive when an "ever ELL" student graduates with a diploma.

Answered: 83 Skipped: 0



**This is an idea that needs to die its natural death. It doesn't really do anything to help current students. By the time a couple of years of awards are given, and the word of mouth goes out among the students, we will have already be labeled failing under the other multitude of accountability provisions. That**

## **amount of money isn't enough anyway to remove the obstacles that might prevent an ELL student from graduating.**

I wish it were proactive for districts like mine who have succeeded with graduating ELL lifers. This brings attention to this group of students and highlights successes.

Let's educate kids and not worry about getting \$250 for an ever ELL graduating with a diploma.

We should be committed to graduating all students. Attaching an incentive feels like we're going to work harder now. sends the wrong message.

Its our job to teach, the extra weighting formula is sufficient.

This could be seen as incentives that are less educational and more desperation.

What is the purpose of this? I agree it should go to the student.

This would be a great incentive, but not necessary. All schools should have the goal of all students, regardless of their subgroup, to graduate from high school with a regular diploma.

I think this idea makes sense and provides incentive for school programs that support students stay engaged throughout the 9-12 years.

What would be the purpose of this proposal?

If that money goes back into ELL services.

With this incentive, we will all have to focus more on our language learners who have exited the EL Program.

This proposal would not allow schools to spend the \$250 on the students who actually needed it--but only on those who follow after. EL teachers are not entrepreneurs waiting to be motivated by a prize for discovering how to exit ELs. We are professionals who know what to do and work hard to accomplish it--but need more funding and tools. Offering the funding in retrospect would be like offering to pay hospitals for cancer treatments once a patient is cured.

Why would the district get that? It's insulting to make a claim that a group of students receiving a diploma is worthy of a district receiving money. Would we ever consider giving a district money for an "ever poor colored student" getting a diploma? We do not buy diplomas. Does a surgeon get more money if the patient doesn't die on the table? Give the student the money in terms of a tuition voucher or a savings bond, etc. to use for post high school work.

No incentive should be given. All ELL should be graduating with a diploma. We have worked and continue to work hard to ensure that everyone in the organization takes ownership for our ELs. A \$250 incentive would shift that thinking to monetary win instead of our moral obligation to ensure all students regardless of race/language attain HS diploma.

Our graduation rate for our Hispanic students has been increasing over the years. It would be nice to recognize the extra effort it takes to support the students.

There is an underlying theme in this survey suggesting that districts would be doing a better job of exiting ELs if they had a monetary incentive - either by losing funding or getting a bonus. This approach underscores the lack of awareness relative to the complexities of EL achievement. The one question that is good is making it mandatory that districts use the weighted funding (90%) on ELs.

Love the idea of recognizing that language acquisition is a life long idea. However, will this be a stigma the student carries through high school graduation? Or will this label be hidden in our data in a way that is unknown to the student? We know that remaining labeled EL increases drop out rates, which is why I am asking. If the student will knowingly carry the label, the incentive is not worth it.

Only for a standard diploma.

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In addition, you might consider funding bonuses to districts for students who exit early.

What type of diploma is this? Standard or modified or either?

This would be a great incentive for districts to track and support ever EL students.

No... we should be working hard to get all students across the podium. We shouldn't need an incentive to be paid extra if this happens. Other issues around the EL population have not even been addressed here.. what if an EL is also SPED... how about we keep the second weight for SPED, plus the .5 weight for EL? that makes sense to me.

Like the incentive based outcomes. For some it will make a difference.

The Ever ELL students that graduate are not the biggest concern. It is the Highschool kids that are "stuck" in the ELD program and have lost hope and motivation and end up dropping out because they are unsuccessful. We need to look at ways of intervening in elementary school to increase their chances of exiting an ELL program.

Hmmmm...4 years? 5 years? No.

Too hard to police...districts become competitive.