



Public University Support Fund (PUSF) Briefing

October 30th, 2018

Tuition and Fees Advisory Board

Discussion Topics

- PUSF Overview
- Comparative University Funding
- Detailed Funding Categories
- Future HECC initiatives

PUSF Overview

The PUSF is the state's primary direct funding contribution for university operations and is distributed via the Student Success and Completion Model (SSCM).

Components of PUSF:

- Activity Based Funding: Student Credit Hours (SCH)
- Outcomes Based Funding: Degrees & Certificates
- Mission Differentiation Funding

Other Non-PUSF funding streams:

- State Programs
- Statewide Public Service Programs
- Sports Lottery



Comparative University Funding

| FY2018 | EOU | OIT | OSU | PSU | SOU | UO | WOU | Total |
|---------------------------|----------------|----------------|-----------------|----------------|----------------|----------------|----------------|-----------------|
| Enrollment Based | \$3.3M | \$5.2M | \$40.2M | \$32.5M | \$5.3M | \$25.8M | \$7.0M | \$119.2M |
| Outcomes Based | \$5.5M | \$8.1M | \$57.8M | \$51.3M | \$7.4M | \$37.7M | \$10.1M | \$177.9M |
| Mission Differentiation | \$11.1M | \$12.7M | \$16.8M | \$4.1M | \$8.2M | \$4.2M | \$6.8M | \$63.9M |
| State Programs | \$152k | \$1.2M | \$10.2M | \$5.2M | \$248k | \$2.1M | \$295k | \$19.5M |
| State Wide Public Service | - | - | \$72.5M | - | - | - | - | \$72.5M |
| Sports Lottery | \$457k | \$457k | \$515k | \$1.1M | \$457k | \$515k | \$581k | \$4.1M |
| Total | \$20.5M | \$27.7M | \$198.1M | \$94.3M | \$21.6M | \$70.4M | \$24.7M | \$457.2M |



Comparative University Funding

| FY2018 | EOU | OIT | OSU | PSU | SOU | UO | WOU | Total |
|---|-----------------|-----------------|-----------------|----------------|----------------|----------------|----------------|----------------|
| Fundable Students | 1,668 | 2,143 | 17,519 | 15,940 | 2,523 | 13,017 | 3,589 | 56,399 |
| PUSF Funding | \$19.9M | \$26.0M | \$114.8M | \$87.9M | \$20.8M | \$67.8M | \$23.8M | \$361.0M |
| PUSF Funding Per Fundable Student | \$11,930 | \$12,150 | \$6,553 | \$5,515 | \$8,261 | \$5,206 | \$6,639 | \$6,402 |
| Total Funding | \$20.5M | \$27.7M | \$198.1M | \$94.3M | \$21.6M | \$70.4M | \$24.7M | \$457.2M |
| Total Funding Per Fundable Student | \$12,295 | \$12,933 | \$11,306 | \$5,913 | \$8,541 | \$5,409 | \$6,883 | \$8,106 |



Comparative University Funding

| FY2018 | EOU | OIT | OSU | PSU | SOU | UO | WOU | Total |
|--|------------|------------|------------|------------|------------|------------|------------|------------|
| PUSF | \$19.9M | \$26.0M | \$114.8M | \$87.9M | \$20.8M | \$67.8M | \$23.8M | \$361.0M |
| State Programs | \$152k | \$1.2M | \$10.2M | \$5.2M | \$248k | \$2.1M | \$295k | \$19.5M |
| State Wide Public Service Programs | - | - | \$72.5M | - | - | - | - | \$72.5M |
| Sport Lottery | \$457k | \$457k | \$515k | \$1.1M | \$457k | \$515k | \$581k | \$4.1M |
| Total | \$20.5M | \$27.7M | \$198.1M | \$94.3M | \$21.6M | \$70.4M | \$24.7M | \$457.2M |
| | | | | | | | | |
| Total E & G | \$39.9M | \$59.1M | \$641.8M | \$340.6M | \$61.8M | \$519.9M | \$93.0M | \$1.8B |
| Percentage of E & G Funded with State Appropriations* | 51% | 47% | 31% | 28% | 35% | 13% | 27% | 26% |

*Does not include Sports Lottery Funding as significant portion funds auxiliary programs

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Activity and Outcomes Based Funding

- “Fundable Students” mainly include Oregon residents
- Calculations based on 3-year rolling averages
- FY19: Outcomes – Degrees and Certificates - 60% of model
- FY19: Activity – Student Credit Hours (SCH) - 40% of model
- Credit hours and degrees are cost-weighted based on student level and field of study (Based on old data from 1990’s Delaware Cost Study)
- Outcomes Weighting: Extra points awarded for certain areas of study (STEM, Health, and Bilingual Education), and targeted student populations (underrepresented minority, rural, low-income and veteran)
- Transition period to outcomes based funding (stop loss / stop gain) ends in FY2020



Activity and Outcomes Based Funding

| FY2018 | EOU | OIT | OSU | PSU | SOU | UO | WOU | Total |
|---|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Fundable Students | 1,668 | 2,143 | 17,519 | 15,940 | 2,523 | 13,017 | 3,589 | 56,399 |
| Enrollment Based Funding | \$3.3M | \$5.2M | \$40.2M | \$32.5M | \$5.3M | \$25.8M | \$7.0M | \$119.2M |
| Outcomes Based Funding | \$5.5M | \$8.1M | \$57.8M | \$51.3M | \$7.4M | \$37.7M | \$10.1M | \$177.9M |
| Total Activity & Outcomes Based Funding | \$8.8M | \$13.3M | \$98.0M | \$83.8M | \$12.6M | \$63.5M | \$17.1M | \$297.1M |
| Total Activity & Outcomes Based Funding Per Fundable Student | \$5,252 | \$6,209 | \$5,595 | \$5,258 | \$5,013 | \$4,881 | \$4,755 | \$5,269 |



PUSF Overview

- Activity Based Funding – Enrollment: distributes resources based on student credit hour (SCH) completions of fundable students
- Outcomes Based Funding: rewards degree and certificate completions by fundable students
- Mission Differentiation Funding: supports the unique regional, research and public service missions and activities of each university. It represents “line item” funding for services, programs or operations.

Mission Differentiation Funding

| FY2018 | EOU | OIT | OSU | PSU | SOU | UO | WOU | Total |
|---------------|----------------|----------------|----------------|---------------|---------------|---------------|---------------|----------------|
| Mission | \$1.0M | \$5.2M | \$11.2M | \$2.3M | \$683k | \$2.4M | \$514k | \$23.3M |
| Regional | \$9.8M | \$6.9M | \$2.7M | - | \$6.8M | - | \$5.6M | \$31.8M |
| Research | \$87k | \$87k | \$2.9M | \$914k | \$133k | \$1.8M | \$204k | \$6.1M |
| Dual Credit | \$278k | \$525k | - | \$922k | \$570k | - | \$403k | \$2.7M |
| Total | \$11.1M | \$12.7M | \$16.8M | \$4.1M | \$8.2M | \$4.2M | \$6.8M | \$63.9M |



Mission Differentiation Funding

| 2017-18 MISSION DIFFERENTIATION ALLOCATION BY LINE ITEM | | | | | | | | | | |
|---|--|----------------------|----------------------|---------------------|---------------------|---------------------|---------------------|---------------------|----------------------|---------------------|
| | | EOU | OIT | OSU | OSU-CC | PSU | SOU | UO | WOU | Total |
| Mission Support | Law & Legal Studies (CIP 22) | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 639,490 | \$ - | \$ 639,490 |
| | Pharmacy (CIP 51.2) | \$ - | \$ - | \$ 1,098,365 | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 1,098,365 |
| | Vet. Med (CIP 51.24) | \$ - | \$ - | \$ 3,665,707 | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 3,665,707 |
| | Engineering Technology Undergraduate | \$ - | \$ 1,581,874 | \$ - | \$ - | \$ 18,251 | \$ - | \$ - | \$ 3,486 | \$ 1,603,611 |
| | Engineering Graduate | \$ - | \$ 41,420 | \$ 2,399,872 | \$ - | \$ 621,782 | \$ - | \$ 3,257 | \$ - | \$ 3,066,331 |
| | Collaborative OUS Nursing Program | \$ 23,397 | \$ 13,733 | \$ - | \$ - | \$ - | \$ 39,516 | \$ - | \$ 25,939 | \$ 102,585 |
| | Regional Solutions | \$ 13,892 | \$ - | \$ - | \$ 13,892 | \$ 13,892 | \$ - | \$ 13,892 | \$ - | \$ 55,568 |
| | Statewide Access | \$ - | \$ 881,430 | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 881,430 |
| | Campus Public Service Programs | \$ 235,494 | \$ - | \$ - | \$ - | \$ 605,796 | \$ 105,061 | \$ 574,178 | \$ 1,618 | \$ 1,522,147 |
| | Bldg. Maintenance / SWPS | \$ - | \$ - | \$ 1,893,951 | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 1,893,951 |
| | Southwestern Oregon University Center (SOUC) | \$ 119,610 | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 119,610 |
| | OCATE | \$ - | \$ - | \$ - | \$ - | \$ 618,508 | \$ - | \$ - | \$ - | \$ 618,508 |
| | Oregon Wide-Area Education Network (OWEN) | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 429,191 | \$ - | \$ 429,191 |
| | Chancellor's Office Operations | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| | Systemwide Expenses / Programs | \$ 58,647 | \$ 55,728 | \$ 827,826 | \$ - | \$ 253,926 | \$ 134,536 | \$ 737,942 | \$ 156,649 | \$ 2,225,254 |
| | Veterinary Diagnostic Lab | \$ - | \$ - | \$ 1,301,044 | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 1,301,044 |
| | Health Professions Programs | \$ 292,909 | \$ 2,402,433 | \$ - | \$ - | \$ - | \$ 404,131 | \$ - | \$ 326,754 | \$ 3,426,227 |
| | PSU-NEW Leadership Oregon | \$ - | \$ - | \$ - | \$ - | \$ 69,471 | \$ - | \$ - | \$ - | \$ 69,471 |
| | Rural Access | \$ 268,553 | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 268,553 |
| | PSU-Oregon Biodiversity Information Center (prev | \$ - | \$ - | \$ - | \$ - | \$ 52,351 | \$ - | \$ - | \$ - | \$ 52,351 |
| OIT AA SCH Adjustment Beginning FY16 | \$ - | \$ 212,229 | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 212,229 | |
| Subtotal | \$ 1,012,502 | \$ 5,188,847 | \$ 11,186,765 | \$ 13,892 | \$ 2,253,977 | \$ 683,244 | \$ 2,397,950 | \$ 514,446 | \$ 23,251,623 | |
| Regional Support | Regional University Support Adjustment | \$ 2,926,441 | \$ 2,688,243 | \$ - | \$ 2,077,936 | \$ - | \$ 2,497,330 | \$ - | \$ 1,962,392 | \$ 12,152,342 |
| | Retrenchment | \$ 206,687 | \$ 206,789 | \$ - | \$ 137,846 | \$ - | \$ 206,782 | \$ - | \$ 206,744 | \$ 964,848 |
| | Retention & Graduation | \$ 361,702 | \$ 361,879 | \$ - | \$ 241,231 | \$ - | \$ 361,870 | \$ - | \$ 361,802 | \$ 1,688,484 |
| | Underpinning | \$ 361,702 | \$ 361,879 | \$ - | \$ 241,231 | \$ - | \$ 361,870 | \$ - | \$ 361,802 | \$ 1,688,484 |
| | 11-13 Regional Support | \$ 838,452 | \$ 838,453 | \$ - | \$ - | \$ - | \$ 838,454 | \$ - | \$ 838,453 | \$ 3,353,812 |
| | Regional Access | \$ 900,012 | \$ 387,482 | \$ - | \$ - | \$ - | \$ 290,603 | \$ - | \$ 96,852 | \$ 1,674,949 |
| | IT Fifth Site/OCATE/Southwest Oregon/OWEN | \$ 507,247 | \$ 507,247 | \$ - | \$ - | \$ - | \$ 507,247 | \$ - | \$ 507,247 | \$ 2,028,988 |
| | EOU Resident/Fundable Adjustment Beginning FY16 | \$ 2,113,119 | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 2,113,119 |
| | TRU Shared Services | \$ 1,545,061 | \$ 1,578,357 | \$ - | \$ - | \$ - | \$ 1,744,707 | \$ - | \$ 1,307,445 | \$ 6,175,570 |
| Subtotal | \$ 9,760,423 | \$ 6,930,329 | \$ - | \$ 2,698,244 | \$ - | \$ 6,808,863 | \$ - | \$ 5,642,737 | \$ 31,840,596 | |
| Research | Sponsored Research | \$ 45,956 | \$ 17,516 | \$ 2,248,685 | \$ - | \$ 372,844 | \$ 35,030 | \$ 1,106,943 | \$ 132,069 | \$ 3,959,043 |
| | Faculty Salaries - Research | \$ 41,380 | \$ 69,003 | \$ 628,497 | \$ - | \$ 541,136 | \$ 98,132 | \$ 736,643 | \$ 72,053 | \$ 2,186,844 |
| | Subtotal | \$ 87,336 | \$ 86,519 | \$ 2,877,182 | \$ - | \$ 913,980 | \$ 133,162 | \$ 1,843,586 | \$ 204,122 | \$ 6,145,887 |
| Dual Credit | \$ 277,820 | \$ 525,420 | \$ - | \$ - | \$ 921,715 | \$ 570,300 | \$ - | \$ 402,069 | \$ 2,697,324 | |
| Total | \$ 11,138,081 | \$ 12,731,115 | \$ 14,063,947 | \$ 2,712,136 | \$ 4,089,672 | \$ 8,195,569 | \$ 4,241,536 | \$ 6,763,374 | \$ 63,935,430 | |



Other Operating Funds (Outside of PUSF)

- State Programs: largely non-academic programs at public universities focusing on a public university's public service mission.

State Programs Funding

| 2017-18 PUBLIC UNIVERSITY STATE PROGRAMS | | | | | | | | |
|--|-------------------|---------------------|----------------------|---------------------|-------------------|---------------------|-------------------|----------------------|
| | EOU | OIT | OSU | PSU | SOU | UO | WOU | Total |
| Engr Technology Sustaining Funds | \$ 152,353 | \$ 1,220,901 | \$ 6,902,678 | \$ 3,223,021 | \$ 248,459 | \$ 500,000 | \$ 294,931 | \$ 12,542,343 |
| Dispute Resolution | - | - | - | \$ 451,733 | - | \$ 838,932 | - | \$ 1,290,665 |
| Oregon Solutions | - | - | - | \$ 1,157,965 | - | - | - | \$ 1,157,965 |
| OSU Fermentation Science | - | - | \$ 635,857 | - | - | - | - | \$ 635,857 |
| Signature Research | - | - | \$ 253,539 | \$ 26,688 | - | \$ 253,538 | - | \$ 533,765 |
| Labor Education Research Center (LERC) | - | - | - | - | - | \$ 348,061 | - | \$ 348,061 |
| OSU Ocean Vessels Research | - | - | \$ 317,928 | - | - | - | - | \$ 317,928 |
| Population Research Center | - | - | - | \$ 223,296 | - | - | - | \$ 223,296 |
| Institute for Natural Resources | - | - | \$ 204,721 | - | - | - | - | \$ 204,721 |
| Clinical Legal Education | - | - | - | - | - | \$ 178,548 | - | \$ 178,548 |
| Oregon Climate Change Research Institute | - | - | \$ 160,470 | - | - | - | - | \$ 160,470 |
| TallWood Design Institute | - | - | \$ 1,743,717 | - | - | - | - | \$ 1,743,717 |
| PSU Profiling Study | - | - | - | \$ 128,459 | - | - | - | \$ 128,459 |
| Total | \$ 152,353 | \$ 1,220,901 | \$ 10,218,910 | \$ 5,211,162 | \$ 248,459 | \$ 2,119,079 | \$ 294,931 | \$ 19,465,795 |



Other Operating Funds (Outside of PUSF)

- State Programs: largely non-academic programs at public universities focusing on a public university's public service mission.
- Statewide Public Service Programs: three programs at Oregon State University
 - Agricultural Experiment Station
 - Extension Service (also including Lottery Funds for the voter-approved Outdoor School Program)
 - Forest Research Laboratory

State Wide Public Service Program Funding (Hosted at OSU)

| 2017-19 Statewide Public Service Programs (Estimated) | Agriculture Experiment Station | Extension Service | Forest Research Laboratory | Total |
|---|--------------------------------|-------------------|----------------------------|----------------|
| SB 5524 – State General Fund | \$32.4M | \$23.4M | \$5.0M | \$60.8M |
| SB 5524 – State Lottery Fund | - | \$11.8M | - | \$11.8M |
| Total | \$32.4M | \$35.1M | \$5.0M | \$72.5M |



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- Statewide Public Service Programs: three programs at Oregon State University
 - Agricultural Experiment Station
 - Extension Service (also including Lottery Funds for the voter-approved Outdoor School Program)
 - Forest Research Laboratory
- Sports Lottery: resources provided to support athletic programs and student scholarships.

Sports Lottery Funding

| | 2018-19 |
|--------------|---------------|
| EOU | \$457k |
| OIT | \$457k |
| OSU | \$515k |
| PSU | \$1.1M |
| SOU | \$457k |
| UO | \$515k |
| WOU | \$581k |
| Total | \$4.1M |



Comparative University Funding

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Future HECC Initiatives

- Task force to update the cost-weighting factors embedded in the activity based and outcomes based cell values. Task force scope will also include analyzing impact of multiple “bonus” factors
- Comprehensive review of the entire SSCM model expected to occur in year 6 of the model (FY2021).