



OREGON STATE BOARD OF EDUCATION

DEPARTMENT OF COMMUNITY COLLEGES AND WORKFORCE DEVELOPMENT
255 Capitol St. NE, Salem, OR 97310

April 21, 2003

To: Members, Ways and Means Sub-Committee on Education

From: Cam Preus-Braly, Commissioner 

RE: Questions from the 4/21/03 Hearing

Base Factor

Senator Gordly asked for the consultant's report about the small schools base factor.

Please see:

Attachment A: Reflecting Economies of Scale in the Oregon Community College Fund.

The "gap"

Representative Morgan asked for the matrix that illustrates "the gap."

Moving from a funding formula that contained floors (which prevented any college from receiving less state funding in a given year than it received the year before) to a formula that was based primarily on funding following students required an element to ensure that no college would suffer unacceptably large decreases in state funding from one year to the next during the transition period. That element is called the gap adjustment.

The gap provides a glide slope (both for colleges who would lose funds and for colleges that would gain funds) over the course of a five-year period. The calculation used in the gap is:

- formula is run as if fully implemented (base + FTE Distribution = formula resources)
- the result is compared to formula resources for the prior year
- each college's gain or loss is moderated by an adjustment as follows:
 - 1999-2000 – 20% adjustment
 - 2000-2001 – 25% adjustment
 - 2001-2002 – 33.3% adjustment
 - 2002-2003 – 50% adjustment
 - 2003-2004 – 75% adjustment
 - 2004-2005 – no gap adjustment

Using the chart below as an example, in 2001-02 Blue Mountain Community College received \$276,580 more than had the gap adjustment not existed. Colleges with negative numbers did not gain as much as they would have without the gap adjustment. If all other



factors had remained equal, the Blue Mountain trend line (that is, smaller and smaller numbers as we head towards a \$0 adjustment in 2004-05) would have held true for all colleges; however, variations in each district's property tax revenues and enrollment trends have caused the gap adjustment to have varying effects on different colleges.

Community College	1999-2000 Gap Adjustment	2000-01 Gap Adjustment	2001-02 Gap Adjustment	2002-03 Gap Adjustment	2003-04 Gap Adjustment
Blue Mountain	\$562,322	\$316,038	\$276,580	\$191,862	\$134,973
Central Oregon	(\$681,594)	(\$680,798)	(\$393,012)	(\$85,046)	\$6,924
Chemeketa	\$408,562	\$919,407	\$1,018,309	\$705,202	\$336,945
Clackamas	(\$694,311)	(\$325,387)	\$6,429	\$12,057	(\$116,661)
Clatsop	\$129,511	\$85,180	(\$68,286)	(\$133,214)	(\$47,351)
Columbia Gorge	(\$199,938)	(\$147,474)	(\$289,101)	(\$229,080)	(\$100,950)
Klamath	\$185,168	(\$18,926)	(\$308,609)	(\$411,017)	(\$276,146)
Lane	\$1,136,454	\$1,478,246	\$1,470,113	\$759,241	\$217,545
Linn-Benton	\$341,095	\$242,262	\$241,198	\$122,047	\$117,217
Mt. Hood	(\$1,092,328)	(\$1,052,983)	(\$1,085,891)	(\$478,588)	\$19,727
Oregon Coast	\$92,387	\$118,443	\$27,033	(\$32,001)	(\$18,379)
Portland	(\$889,129)	(\$1,093,719)	(\$748,635)	(\$938,179)	(\$561,479)
Rogue	\$1,538,079	\$535,154	(\$93,915)	\$191,699	\$13,212
Southwestern Oregon	(\$132,860)	(\$346,734)	(\$172,382)	\$83,539	\$129,628
Tillamook Bay	(\$87,678)	\$8,997	(\$36,013)	(\$69,053)	(\$52,337)
Treasure Valley	(\$89,286)	\$76,071	\$306,546	\$311,015	\$144,770
Umpqua	(\$526,454)	(\$113,776)	(\$150,364)	(\$485)	\$52,362

Household Tax Burden

Representative Morgan and Representative Bates asked for information about the tax burden for households and how that tax burden might be translated to community college students specifically.

We have used information from the Oregon Department of Revenue and per capita salary information provided to the committee by Steve Bender last week to answer this question. The attachment shows, by county:

- the average value of all improved residential properties for 2001-02 (the last year available);
- the permanent tax rate for the community college in each county (for simplicity in displaying the information we have only shown one college rate for each county, though several counties contain portions of more than one district);
- the yearly tax burden that results from applying the rate to the average value;
- the 2001-02 tuition per credit hour of the college in the district;

- the combined cost of 45 credit hours of tuition and the tax rate for the average household;
- per capita household income (please note that this is for 2000); and,
- the one year cost of the college as a percentage of per capita income.

This approach does exclude other types of property tax revenues generated in the county and is a look back at historical information but we do hope that this provides a useful answer to the question posed by Rep. Bates and Rep. Morgan.

Please see:

Attachment B: Community College Tax Burden for the Average Homeowner

FTE by County

Representative March asked to see the Oregon map with student FTE rather than headcount.

Please see:

Attachment C: Total FTE by Student County of Residence

Teacher Prep Budget Note

Senator Gordly asked about community college partnerships with OUS and with the independent colleges on teacher preparation.

The partnerships with the Chancellor's Office, Oregon University System (OUS) and CCWD, as well as among the colleges, is very strong. Interactions with the independent colleges are less frequent. Beginning in 2001, CCWD has participated in a series of meetings hosted by the Oregon Department of Education that brought community college and university programs (both public and private) together to discuss articulation and other programmatic issues, particularly in support of the teacher education programs. Several community colleges also have very specific articulation agreements with their independent college partners.

Community college programs are active and regular collaborators with their OUS partners. The Oregon Technology Infusion Project, a Preparing Tomorrow's Teachers with Technology (PT3) grant was a partnership between five community colleges and two universities. This project utilized distance delivery methods to deliver course work between the colleges. The collaborators in this partnership are preparing to write a PT3 "dissemination grant" to fund the continuation of the project and to involve additional colleges. Other examples of community college initiatives and partnerships with OUS, K12 and independent institutions are excerpted from the Minority Teacher Report: Response to the Minority Teacher Act of 1991 in Attachment D.

Community college education program staff were also active collaborators with the OUS in the preparation of the advising guide for teacher preparation programs *How To Become A Teacher, 2002*. At a recent articulation meeting hosted by OUS, community colleges participated in a full day of information sharing and program discussions with public four-year universities, and independent colleges.

Please see:

Attachment D: Excerpts from the Oregon Minority Teacher Report

OYCC Funding

On April 16th, Representative March asked whether there were other funding streams that might support OYCC's work.

Regarding other sources of revenue to support the OYCC program, OYCC has worked with every likely state and federal agency and with local providers. This ongoing effort has increased the local match from less than 3-1 to 3.5-1 for summer crews in the last four years, a difference of at least \$200,000 for youth salaries. Many statewide contributors (Nature Conservancy, AmeriCorps, Duck Unlimited, etc.) in partnerships at the local level, have leverage OYCC funds for additional activities. Other outside providers of funding (Meyer, Ford Family Foundation, and others) have asserted that they will not backfill state funding shortfalls.

OYCC staff and advisors will continue to search for revenue and expense options that impact access as little as possible and retain quality.

Please see:

Attachment E: OYCC Summer Programs

Management to Staff Ratios

Senator Messerle asked about the ratio of managers to staff and whether it is too high.

There are eight Executive/Management Service staff in the agency who have direct supervisory responsibilities. As mentioned yesterday, two additional Management Service positions are under review and will likely be moved to classified service next fiscal year. These eight managers provide oversight and accountability for staff administering six major funding streams in the agency; these funds are distributed to a variety of local service providers, including community colleges, local workforce areas, GED testing sites, and OYCC programs located in each county.

- the combined cost of 45 credit hours of tuition and the tax rate for the average household;
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October 16, 2000

Cam Preus-Braly, Commissioner
Department of Community Colleges & Workforce Development
255 Capital Street NE
Salem, OR 97310

Subject: Reflecting Economies of Scale in the Oregon Community College Funding Model

Dear Commissioner Preus-Braly:

The purpose of this letter is to summarize the findings of a study of the thirty formula funding models across the United States with respect to how they reflect economies of scale, and to make recommendations regarding how to reflect this factor in the Oregon community college funding model.

Economies of Scale

Economies of scale occurs when mass producing a good or service results in lower average cost. Exemplified in simplest terms, let us say that it costs \$1 million in human and material base costs to develop the infrastructure to produce a particular item. The cost per item for 100 items would be \$10,000 (\$1 million divided by 100 = \$10,000); for 1,000 items, the cost per item would be \$1,000 per item; for 10,000 the cost per item would be \$100; and so on.

Though generally applied and researched relative to manufacturing, economies of scale has also been studied and found valid in education. Applied specifically to community colleges:

- *Every* community college, regardless of size, must have a minimal administrative and staffing infrastructure: a president, core of central and academic administrators; staff to perform basic functions such as accounting, admissions, registration, financial aid, counseling, etc.
- *Every* community college, regardless of size, needs a minimal number of faculty in certain basic academic disciplines in order to have the intellectual infrastructure to serve the educational needs of students: language, literature, sciences, mathematics, selected vocational program areas, etc.
- *Every* community college, regardless of size, must invest in certain "material" base costs: electrical infrastructure; technology infrastructure; HVAC power plant; facilities; computer labs; etc.

Moreover, economies of scale come into play on a day to day basis when operating a campus. For example, larger campuses are able to purchase goods in larger quantities, hence lowering average costs. When borrowing funds, larger districts and schools are often able to negotiate more favorable interest rates than their smaller counterparts, also lowering average costs.

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Differing Approaches to Reflect Economies of Scale in Funding Models

As I reported in my report of August 14, 2000, a funding model is a mathematical approach to distributing funds across a diverse set of institutions. It is helpful to view them as equations, where $a + b + c + d + \dots$ equals a certain dollar amount; and, where "a", "b", "c", etc. are derived from "sub-formulas" used to calculate budget needs for the standard categories used to report expenditures all across American higher education: Instruction; Research; Academic Support; Student Services; Public Service; Operations and Maintenance of Plant; Institutional Support. Hence, a state with a funding model that has a sub-formula for each category would describe its formula as $I + R + AS + SS + PS + OMP + IS = \text{Formula Generated Need}$.

An analysis of the thirty state funding models reveals that relatively few reflect differences in institutional size, hence economies of scale, in either their sub-formulas or overall funding model. Some, however, do, whether explicitly or indirectly. Following are the most common ways that funding models take into account institutional size, hence economies of scale.

Benchmarking

As outlined in my August 14, 2000 report, the benchmarking approach uses data from peers to calculate formula generated need. For example, the benchmark approach multiplies Campus A's total number of full-time equivalent students (FTES) by the actual instructional cost per FTES for selected peers to arrive at the Instructional allocation to Campus A; and, it multiplies Campus A's assignable square feet by the actual cost per square feet for selected peers to arrive at the Operations and Maintenance of Plant allocation for Campus A; and, so on for each component of the formula funding model.

Institutional size is often one of the factors often cited in the selection of peers (e.g., Kentucky, Tennessee, Louisiana).

Moreover, the benchmarking approach is sometimes chosen for competitive reasons. That is, a state desires to have all of its community colleges funded on a par with other states that are competing for economic expansion, workforce development and other state priorities requiring intellectual capital. In some states (e.g., Maryland) schools are allowed to add "aspirational peers" to their peer groups, which, not surprisingly, have average funding considerably higher than themselves or other peers.

When a state uses a benchmarking approach that takes into account institutional size; and, it uses peers that are relatively well funded and whose funding is well aligned with their institutional mission, goal setting and aspirations, economies of scale is reflected, even if unintentionally.

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Special Formula Allocation in the "Base" for Small Campuses

Some states, Illinois (for community colleges) and Oregon (for universities) begin their formulas with a "base calculation" for each campus, and then apply a special allocation to the "base calculation" to their small campuses in recognition of economies of scale.

In Illinois, schools/districts with enrollments of less than 2,500 students receive "Small College Grants" of varying amounts depending on school/district size. (Please note that Illinois also provides "Equalization Grants" for districts that have property-tax-revenue-per-student lower than the state average. In order to fund the "Equalization Grants" at a higher level, there has been some discussion of phasing out the "Small College Grants" and moving the funds to the "Equalization Grants" category.)

In the new funding model used by the Oregon University System (adopted by its Board on September 13, 1999), the budget begins with a base that is the general-funds-per-FTE-student for the past biennium. This "base" is an equal amount for all campuses. However, there is an additional allocation to campuses with smaller enrollments. For the 2001-2003 biennium the small college factor is proposed to be as follows:

1. At the beginning of every year each school would receive an approved FTES enrollment target.
2. After the approved FTES targets are approved, some schools would receive additional dollars from a "Small School Formula Fund". The amount allocated is proposed to be \$650 for every FTES below 7,000. (The \$650 and 7,000 FTES figures were selected based upon considerations of equity, reasonableness and affordability.)
3. At the close of the fiscal year, there would be a "year-end settling up", whereby schools falling below target would receive additional funds, in the amount of \$650 per FTE; and those falling above target would make a refund in the amount of \$650 per FTES. Please note that schools retain tuition revenue, which is higher than \$650 per FTES. So, those above target (hence making a refund) would experience a greater financial benefit than the allocation from the "Small School Formula Fund".

Special Temporary Treatment for Small Campuses

The University and Community College System of Nevada approved a new formula funding model in June, 2000 which has uniform permanent factors *except* that it assigned *richer* temporary factors in certain sub-formulas for its two smallest community colleges. These temporary factors will remain in effect until their enrollments reach 3,000 FTES.



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Reflecting Institutional Size in the Institutional Support Sub-Formula

Though formulas can vary, in terms of precisely what is included in the calculation of each of its sub-formulas, the Institutional Support sub-formula often includes many of the costs that are described as the “fixed” or “base” costs. In his recent report, “Community College Cost Per Student”, Bret West characterized Institutional Support as “the day-to-day costs of operation including general administrative services, executive direction and planning, legal services, and fiscal operations.” Because Institutional support includes many of the fixed costs incurred regardless of institutional size, some formulas (e.g., Tennessee and Nevada, being prime examples) have special factors in their Institutional Support sub-formulas that reflect institutional size.

Tennessee begins its Institutional Support sub-formula for community colleges with a base amount of \$150,000 and adds to this, 10.5% of the first \$12 million of the sum of all of the other sub-formulas (Instruction, Academic Support, Student Services, etc.) and 7.59% of the remaining sum of all of the other sub-formulas.

Nevada calculates its Institutional Support sub-formula for community colleges by multiplying 15% of the first \$17.5 million of the sum of all of the other sub-formulas (Instruction, Academic Support, Student Services, etc.); 10% for the second \$17.5 million of the sum of all of the other sub-formulas; and 7.5% of the sum of all of the other sub-formulas over \$35 million. Institutional Support is one of the sub-formulas that is impacted by a temporary small school factor mentioned in the prior section. Until the two smallest community colleges reach 3,000 FTES, they will receive 17% of the first \$17.5 million of the sum of all of the other sub-formulas; 10% for the second \$17.5 million of the sum of all of the other sub-formulas; and 7.5% of the sum of all of the other sub-formulas over \$35 million.

The California Community College Formula Funding Model

The calculations in the California community college funding model are the most intricate in the nation. The model contains a multitude of factors, and it is also the most sensitive to institutional size and economies of scale. Primarily student driven, it multiplies an amount times *FTE Students* to arrive at Instructional and Instructional Support needs; an amount times *student headcount* for Student Services needs; amounts times campus space to arrive at Maintenance and Operations needs; and a set percentage of the *sum* of Instruction, Instructional Services, Student Services, and Maintenance and Operations for Institutional Support. To control for economies of scale, the model applies a complex calculation that produces a “College Size Factor” in the Instruction and Student Services sub-formulas.

The “college size” calculation is based upon a study conducted in the mid-1980’s. The study measured the impact of institutional size on *all* average costs: Instruction; Instructional Services; Student Services; Maintenance and Operations; and Institutional Support. (Not included were costs for capital outlay and other special appropriations.) The study revealed that institutional size impacted costs in a curvilinear fashion until enrollment reaches 5,000 FTES. A formula to achieve the curvilinear effect was developed.

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The “college size” calculation for Instruction, which is based upon FTES, produces the following:

<u>FTES</u>	<u>College Size Factor</u>
500	.35134268
1,000	.27842145
1,500	.20623582
2,000	.13478579
2,500	.06407136
3,000	.01084147
3,500	.00813101
4,000	.00542056
4,500	.00271011
5,000 and over	.00000000

As a result of applying the “College Size Factors”, the California community college funding recognizes institutional size and, hence, economies of scale for Instruction and Student Services. Also, because the formula for Instructional Support is indexed to FTE students, and Operations and Maintenance is indexed to the amount of campus space, these two categories are also sensitive to institutional size. Further, because, the institutional support budget is calculated by multiplying the sub-formula-driven totals for *all* other categories (with economies of scale being reflected for Instruction and Student Services, and size a determinant for Institutional Support and Maintenance and Operations) it, too, is sensitive to size and economies of scale.

Summary

The current formula for Oregon Community Colleges may be summarized as follows:

1. A campus receives a “base amount” that correlates to campus size, i.e., smaller campuses receive a smaller “base amount” than do the larger campuses.
2. A campus receive an allocation that is calculated by multiplying total Fall FTE by a dollar amount that is the same for all schools.
3. The sum of step 1 and step 2 is the campus allocation.

The Oregon Board of Education has determined that it wishes to retain the current structure for formula funding for Oregon’s community colleges, except that it will consider changes that reflect institutional size and economies of scale. Moreover, any changes must adhere to four basic principles that were established at the onset of this project:

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1. The process of campus acquisition of funds shall be independent from campus distribution of funds. That is, however the funds are allocated, campuses may use funds as they deem appropriate to meet needs.
2. FTE shall remain the primary determinant of how funds are allocated.
3. If the base amount distributed to campuses is to be refined, it needs to be adjusted each year to remain current.
4. The formula will be easy to understand.

Options

If the Department of Community Colleges and Workforce Development desires to modify its formula to reflect differences in institutional size and economies of scale, I recommend the following options for consideration:

Option One

Adopt an approach similar to the Oregon University System: Select a fixed dollar amount per FTES as a "small college factor" and multiply it by every FTES below a certain campus total FTE. Similar to the Oregon University System, the numbers selected would be based upon considerations of equity, reasonableness, affordability, and political viability.

Option Two

Use the California "college size" approach to reflect differences in institutional size, hence economies of scale. However, rather than applying the complex formula, I would recommend that the Department of Community Colleges and Workforce Development establish a simpler approach by developing FTES ranges (based upon the California model), with "College Size Factors" to the ten-thousandth decimal point associated with each range:

<u>FTES</u>	<u>College Size Factor</u>
0- 750	.3513
750-1,250	.2784
1,250-1,750	.2062
1,751-2,250	.1347
2,251-2,750	.0641
2,751-3,250	.0108
3,251-3,750	.0081
3,751-4,250	.0054
4,251-4,999	.0027
5,000 and over	.0000

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There can be different approaches to using this table. Among them:

A. Apply the "College Size Factors" to the Instructional Budget

- (1) From the total cost-per-FTES used in the current formula, calculate the amount per FTES for Instruction;
- (2) Multiply the amount calculated in step 1 by the appropriate "College Size Factor" listed above, depending on the size of the campus.
- (3) Add the resulting amount to the campus allocation derived from the current formula. It can be added to the base; to Instruction; or, it can be given a unique category such as "College Size Allocation", "Economies of Scale Allocation", or similar title.

B. Apply the "College Size Factors" to the Base Allocation

- (1) Calculate a *single, common* base allocation for all campuses, one that is considered a reasonable "fixed cost" regardless of institutional size;
- (2) Multiply the amount calculated in step 1 by the appropriate "College Size Factor" listed above, depending on the size of the campus.
- (3) Add the result of step 2 to the base (step 1) for each campus.

Recommendation

Each of the above approaches – or variations of them – could be used to refine the current Oregon community colleges formula to reflect institutional size and economies of scale. However, I would recommend using the Option Two B., *Apply the "College Size Factors" to the Base Allocation*, for the following reasons:

- (1) It preserves the fundamental approach of the current formula;
- (2) It adheres to the four principles listed above;
- (3) This refinement does not preclude enhancing other aspects of the formula later should the Department of Community Colleges and Workforce Development wish to do so;
- (4) It flows very well from the principle of economies of scale, i.e., a common fixed cost modified to reflect diminishing average costs (relative to fixed costs), based upon institutional size;
- (5) The "college size factors" are grounded in research using a large sample (California) of over 100 schools that reflects all institutional variations – small, large, urban, rural, university preparatory, vocational, etc.
- (6) It applies a "best practice" approach (California has the most sophisticated methodology for reflecting economies of scale); but, it does not copy its use. Rather, it applies the "best practice" in a way that suits Oregon's situation and needs.

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- (7) Because, as noted in item 3 above, the approach aligns so well with the principle of economies of scale -- more than California, actually -- I believe that it applies a "best practice" approach to achieve a "better than best practice" outcome.

Concluding Thoughts

It has been a pleasure to develop this report. I would be pleased to provide additional information if you wish, and answer any questions that you have.

Sincerely,

STRATUS



Sal D. Rinella, Ph.D.
Vice President

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There are eight Executive/Management Service staff in the agency who have direct supervisory responsibilities. As mentioned yesterday, two additional Management Service positions are under review and will likely be moved to classified service next fiscal year. These eight managers provide oversight and accountability for staff administering six major funding streams in the agency; these funds are distributed to a variety of local service providers, including community colleges, local workforce areas, GED testing sites, and OYCC programs located in each county.

**Community College Tax Burden
for the Average Homeowner**

Attachment B

County	Improved Residential Property - 2001-02 Average Account	Community College Tax Rate per Thousand	Yearly Tax Burden on Average Residential Property	Tuition per Credit Hour - 2001-02	Cost of Yearly Taxes and Tuition @ 45 Credit Hours in 2001-02	Per Capita Personal Income in 2000	One Year of College as % of Per Capita Income
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Wallowa	46.21
Wasco	648.41
Washington	10,772.55
Wheeler	9.41
Yamhill	1,553.24
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Oregon Minority Teacher Report, 2003

Prepared by Oregon University System

Examples of Community College Initiatives

- Treasure Valley Community College's Para-Educator/Bilingual Assistant program is preparing individuals to assist a teacher in regular classroom settings or in providing instruction and supervision to special student populations, such as bilingual/bicultural students, adult learners, and students learning English. The program includes instruction in techniques of general classroom supervision, such as maintaining order, assisting with lessons, and carrying out related assignments. The Para-Educator/Bilingual Assistant Associate of Applied Science Degree program is designed to prepare students to work in school districts as an integral part of the quality delivery of instruction and other services to children, youth, and their families. Students in this program will participate in a variety of experiences, including theory, hands-on learning, small group training, and field-based practicum experience.
- Blue Mountain Community College offers associate degree courses for the elementary teaching licensure program for EOU. Students can take their pre-education coursework at the college and receive their Associate of Arts Oregon Transfer degree (AAOT). In addition, EOU has its teacher licensure baccalaureate program on the college campus in Pendleton. Students do not have to travel to La Grande, 50-100 miles and over a mountainous area in the winter months, thus affording an excellent opportunity for students in the Umatilla/Morrow county area of Northeastern Oregon to participate. There are an increasing number of minorities, especially Hispanic education assistants, who are taking advantage of this program. Many of the courses are also offered at a distance.
- Lane Community College offers a career ladder program for future teachers that attracts a diverse group of students. They take the Foundation of Education classes for two terms while working nine hours a week as practicum teachers in classes throughout Lane County and surrounding counties. After completing Foundation classes (CW 206) and two practica (FE 207), they complete a third practicum at the end of the college's summer term, which is a September Experience class, helping a teacher set up his/her class for the new year. While working in the practicum classroom, students keep connected and reflected journals and share their experiences with others. Spanish-speaking college students are sometimes the only link for young children to their home language. LCC students work at all three immersion schools in Eugene and also work in the poorest schools in Springfield, Eugene, and elsewhere. The LCC practicum teacher, often the first in his/her family to go to college, brings a unique perspective into the cooperating classroom. Native and African American students in the LCC program serve as role models for children of all backgrounds in the public schools. In addition to the cooperative education-teaching program at LCC, students take classes in Children's Literature and Math for Elementary School Teachers at Lane. Students apply for transfer to Pacific University (which has developed a seamless program with LCC), to the UO, or to Northwest Christian College, as well as to more distant schools like WOU and OSU. The coordinator in the teaching program at LCC meets regularly with the faculty and staff from the colleges and universities with teacher preparation programs to assure that students are well served. UO sends students to LCC to get hands-on experience in the classroom before beginning in the graduate teaching program at the university.

- Portland Community College is in the third year of a four-year federal Health & Human Services grant to assist Head Start teachers of Hispanic children to attain their Associate of Applied Science degrees in Early Childhood Education. PCC has nearly 100 students in the project, called the “Hispanic Head Start Initiative.” The majority of these ECE students are Hispanic themselves. As with the majority of PCC’s Early Childhood students, they attend classes part-time while working. This program is tailored to fit the needs of part-time, non-traditional students. These students and other PCC program graduates will be eligible to transfer 81 of their 90 credits to Portland State University’s Child and Family Studies degree program. The Child and Families Studies degree is a common pathway for those interested in working with Early Elementary children who are seeking to enter Teacher Education 5th Year programs. The strategies that have been developed as a part of this grant project have also benefitted other minority students in PCC’s programs.

Examples of Special Initiatives Addressing Diversity Needs

Numerous initiatives are underway by campuses, regional consortia, and statewide collaboratives to increase the diversity of the educator workforce. Examples are provided below.

Project Title: Bilingual/ESOL Endorsements
Lead Institution: Western Oregon University
Partners: Salem-Keizer, Woodburn, Dundee, Silver Falls School Districts
Source of Funds: School Districts
Description: Western Oregon University offers a bilingual/endorsement program in partnership with school districts. The program uses a cohort model; it is offered at times/places convenient for teachers, has high standards, and is taught by diverse faculty/native speakers. An estimated 225 K-12 teachers and 6 higher education faculty are involved in the program.
Contact: Don Olcott, (503) 838-8826, <olcott@wou.edu>

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Project Title: Transition to Teaching
Lead Institution: Western Oregon University
Partners: Salem-Keizer School District
Source of Funds: ESEA federal grant obtained by the school district
Description: This is a teacher preparation program coordinated by Salem-Keizer schools in partnership with Western Oregon University designed to recruit and prepare bilingual/ESL teachers and bilingual Special Education teachers. Students complete a combined initial licensure and bilingual/ESOL endorsement in 10 terms while employed in bilingual schools in the district. Funds help pay tuition, test fees, and the services of a mentor for each candidate. In addition, bilingual resource teachers in the districts and university supervisors provide additional support for the candidates.
Contact: Mary Reynolds, (503) 838-8830, <reynolm@wou.edu>

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Project Title: Bilingual Teacher Pathway Program
Lead Institution: Portland State University
Partners: Mt. Hood Community College, Portland Community College, Clark College (Vancouver, Washington), Chemeketa Community College (Salem), and eight local school districts including Portland Public, Hillsboro, Beaverton, Woodburn
Source of Funds: Federal Grant, Office of Bilingual Education
Description: This is a teacher preparation program designed to fill critical shortages of bilingual education/ESL teachers in the Portland/Vancouver metropolitan and Southwest Washington area, by recruiting and supporting educational assistants and secondary students so that they can become licensed teachers. The purposes of the program are to: (1) recruit bilingual educational paraprofessionals and secondary students into the BTP program; (2) implement a teacher licensure and degree program; (3) coordinate a seamless program of coursework and field experience for bilingual students among community colleges, Portland State University, and school districts; (4) support and retain BTP students at every step toward teaching licensure through individualized advising, assessment, services, financial support, mentors and community building, and provisional licensure/teacher salary while completing their B.A., M.Ed., and Continuing License; and (5) build capacity and commitment for a permanent BTP program in the region. Over 100 preservice candidates are participating in this program.
Contact: Julie Esparza Brown, (503) 725-4696, <jebrown@pdx.edu>

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Project Title: ESOL in the Treasure Valley
Lead Institution: Eastern Oregon University
Partners: Malheur ESD, Nyssa School District, Treasure Valley Community College
Source of Funds: University, School Districts, Community College
Description: Based on the need in the Treasure Valley area for teachers with enhanced skills in literacy/second language acquisition, the School of Education and Business at Eastern Oregon University in collaboration with the Malheur Education Service District, the Nyssa School District, and Treasure Valley Community College has developed an endorsement in ESOL (English for Speakers of Other Languages), specialty coursework in bilingual education, and enhanced work in literacy acquisition. Students pursuing the Early Childhood and Elementary license at Ontario may graduate with the endorsement in ESOL and have additional preparation in the teaching of reading. Current teachers have access to professional development in bilingual education and may add the ESOL endorsement or the bilingual minor.
Contact: Michael Jaeger, (541) 962-3682, <mjaeger@eou.edu>

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Project Title: Southern Oregon Regional Bilingual Education Endorsement (SORBEE)
Lead Institution: Southern Oregon University
Partners: 13 school districts in Klamath, Josephine, and Jackson Counties
Source of Funds: U.S. Department of Education, Title VII, Bilingual Education Teachers and Personnel, \$911,432 over five years
Description: Southern Oregon University in a consortium with 13 local school districts in Jackson, Josephine, and Klamath counties is implementing a program to help alleviate the shortage of qualified teachers for limited English proficient students in the three-county area. SORBEE is assisting 60 currently certified teachers and 15 preservice teachers in obtaining their ESOL/bilingual endorsement at SOU. The program provides financial

support for program teachers and preservice teachers to obtain their ESOL/bilingual endorsement and improve their proficiency in Spanish and/or the Klamath language. To increase access to SOU, alternative delivery of instruction is provided, including an intensive two-week summer institute, and a variety of ESOL courses offered in three weekend sessions each term. The ESOL/bilingual endorsement program at SOU is committed to the development of education environments and teaching practices that enable students from diverse racial, ethnic, and linguistic groups to succeed.

Contact: Gerald McCain, (541) 552-6329, <mccaing@sou.edu>

* * * * *

Project Title: Southern Oregon Consortium for Bilingual Education Careers
Lead Institution: Southern Oregon University
Partners: Jackson Education Service District, Rogue Community College, Klamath Community College, and 13 school districts in Jackson, Klamath, and Josephine Counties
Source of Funds: Title VII, Bilingual Education: Career Ladder Program, \$1,231,387 over five years
Description: Southern Oregon University in a consortium with Rogue Community College, Klamath Community College, and 13 local school districts is implementing a Career Ladder Program. The program aims to alleviate the shortage of qualified teachers needed to teach limited English proficient students in English as a second language and bilingual education programs in three counties. The project expects to graduate approximately 15 licensed teachers with an ESOL/bilingual endorsement, 25 with undergraduate degrees, and 20 graduates with an Associate of Arts degree ready to pursue higher education and a master's in Teaching. Current Career Ladder participants are bilingual in English and Spanish, and there are two Language Specialists from the Klamath Tribes Culture and Heritage Department in Chiloquin. The program provides support for tuition, books, child care, and transportation. Flexible learning opportunities such as distance learning, summer institutes, and tutorial assistance are being implemented. School districts in the consortium agree to assist in the recruitment of participants, allow them flexibility to work while attending school, and hire the program's career-ladder graduates as ESL and bilingual teachers (contingent on available positions).

Contact: Larry Nollenberger, (541) 552-6261, <nollenberger@sou.edu>

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Project Title: Career in Teaching Program
Lead Institution: Oregon State University
Partners: Chemeketa Community College, Salem-Keizer School District
Source of Funds: U.S. Department of Education, Office of Bilingual Education and Minority Languages Affairs, Title VII Career Ladder Grant
Description: The Career In Teaching Program serves non-licensed instructional assistants employed by the Salem-Keizer School District. The program's purposes are to recruit, prepare, and retain in the teaching profession instructional assistants who have demonstrated they are highly skilled working with children in a primary/elementary classroom setting. These instructional assistants represent diverse social, cultural, and linguistic populations. They have demonstrated they are culturally and linguistically responsive to the needs of all learners. The program will result in all students able to learn from a broad range of perspectives; minority students to have more positive role models with whom they can identify; and all students to be better prepared to enter an increasingly multicultural workforce. Most candidates admitted to CITP have not completed bachelor's degrees. The program is designed to help them complete the Associate of General Studies degree at Chemeketa Community College and, simultaneously, the Education Certificate

program; and meet Oregon State University requirements for a baccalaureate degree in Liberal Studies, and, at the same time, those for an Initial Teaching license through course work and practicum experiences delivered entirely in Salem.

Contact: Eileen Waldschmidt, (541) 737-3576, <waldshe@orst.edu>

* * * * *

Project Title: Portland Teachers Program (PTP)

Lead Institution: Quatro-Institutional Partnership

Partners: Portland Community College, Portland State University, Portland Public Schools, University of Portland

Source of Funds: Partner Institutions

Description: The Portland Teachers Program (PTP) was implemented in 1989 as a collaborative effort to increase the number of teachers of color in Portland schools. The University of Portland joined the partnership in 2002. The program's current mission is to increase the number of culturally competent teachers, with a special focus on the recruitment of historically underrepresented groups in the teaching profession. As a retention and scholarship program, PTP assists selected students in completing teacher education and training through regular coursework at Portland Community College, Portland State University, and the University of Portland. PTP provides tuition, seminars, colloquia and other support services for students from college freshman through their graduate year. Graduates must apply for employment with Portland Public Schools (PPS), and if hired, teach there for a minimum of three years. Over 80 students have graduated from the program; most are now working in PPS (one is a vice principal and others are working on administrative licensure). About 60-65 students participate in PTP at any given time.

Contact: Deborah Cochrane, (503) 978-5444, <dcochran@pcc.edu>

* * * * *

Project Title: Immersion for Social Change and Pedagogical Strength in Math and Science

Lead Institution: Oregon State University

Partners: Portland Public School District 1J; Salem/Keizer School District 24J

Source of Funds: Oregon Eisenhower Higher Education Professional Development Grant

Description: The purpose of the project is to provide an immersion experience for preservice teachers in a predominantly minority elementary school. The project provides learning opportunities to strengthen classroom practices of preservice and inservice teachers in science and mathematics while assisting regular classroom teachers of students in a high-poverty, culturally diverse K-5 school. OSU's School of Education, in partnership with Portland Public School District 1J, is designing and implementing a series of workshops for OSU preservice teachers and Portland Public School inservice teachers that address the needs of minority children, particularly in identified benchmarks in mathematics and science. The project includes a three-week placement for preservice teachers in a Portland K-5 school (85% African American) or a highly diverse, bilingual Salem-Keizer school, during which pairs of preservice teachers will work with a mentor teacher. University faculty will provide onsite support. Outcomes expected: (1) Preparation of elementary teachers who are competent in all subject areas, particularly math and science, and who have the pedagogical knowledge and skills for teaching culturally diverse populations. (2) Inservice teachers will gain a clear understanding of strategies they currently use with students in their classrooms and strategies they will be encouraged to add from attending the workshops. (3) Inservice and preservice teachers

will begin to address National Board Certification Standards. Participants: 35 teachers, 60 preservice teachers; 5 OSU faculty.

Contact: Jean Moule, (541) 737-3529, <moulej@orst.edu>

* * * * *

Project Title: Web Course: Racial/Cultural Harmony in the K-12 Classroom
Lead Institution: Oregon State University
Partners: Salem-Keizer School District
Source of Funds: OSU Statewide Distance Education Grant, \$6,048
Description: This course provides an overview of the issues particular to an increasingly racially diverse student population present in public schools today. Implications concerning curriculum design, teaching strategies, parent/teacher interactions, student/teacher interactions are considered in this course. Instructional goals are to assist inservice teachers in their appreciation of the depth and scope of various and compelling racial and cultural issues impacting American public schools today, specifically those of the Salem-Keizer School District; and to facilitate personal growth and understanding in areas of equity. Participants satisfactorily completing this course will be moving toward the following outcomes: to understand their own cultural perspectives; view students as individuals with diverse backgrounds and abilities; value racial and cultural diversity; evaluate critical racial and cultural issues in the Salem-Keizer School District; and synthesize these new perspectives into their own teaching.

Contact: Jean Moule, (541) 737-3529, <moulej@orst.edu>

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Project Title: Oregon Quality Assurance in Teaching Program (O-QAT)
Lead Institution: Oregon University System, Governor's Office, Teacher Standards and Practices Commission
Partners: Oregon Department of Education; Oregon Department of Community Colleges and Workforce Development, Center for Teaching/Learning at Oregon Education Association; 17 higher education partners (public/independent colleges and universities that prepare teachers; Confederation for Oregon School Administrators
Source of Funds: Title II Teacher Quality Enhancement Program, U.S. Department of Education, \$5.2 million, 1999-2003
Description: O-QAT is a partnership of educational agencies and higher education institutions supporting implementation of reforms to improve the quality of teacher education in Oregon. The project emphasizes changes in policy and implementation to ensure systemic, long-term impacts to enhance teacher quality. There are five objectives for the project: (1) Develop improved methods for holding institutions accountable for high-quality teacher preparation through establishing, piloting, and implementing new statewide accountability guidelines, including first-time report card for new teachers, and alignment of state's required tests (Praxis) and performance assessment (Teacher Work Samples) with K-12 standards. (2) Assist institutions to implement yet-needed components of the redesigned programs that lead to the Initial License with a focus on initiatives in the area of enhanced content preparation. (3) Assist institutions to develop and implement needed components of the redesigned programs that lead to Continuing License with focus on developing assessments to be used to determine when/how teachers have met Continuing License requirements. (4) Expand the state's capacity to address critical teacher shortage areas including a diverse educator workforce via new recruitment strategies and alternative pathways to teaching that address populations unserved through traditional teacher preparation programs. (5) Improve state-level

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2003 Oregon Youth Conservation Corps Proposals

Attachment E

Proposal ID #	County	Program Sponsor	Amount Funded	Proposed Match	Ratio of Match	# of Youth	Avg. Program Length (Days)	Project work hours	# of Youth Crew Leaders	Program Length (Days)	Project work hours
SCC03-1	BAKER	Training and Employment Consortium	\$10,000.00	\$14,302.31	1.3	6	34	1632	0	0	0
SCC03-2	BENTON	Northwest Youth Corps	\$10,000.00	\$11,724.00	1.1	10	14	1050	1	14	112
SCC03-3	CLACKAMAS	Canby School District	\$5,000.00	\$28,600.00	2.6	6	28	1176	0	0	0
SCC03-3B	CLACKAMAS	Earth Crusaders	\$5,000.00	\$14,548.00	1.3	6	24	1152	1	28	224
SCC03-4	CLATSOP	Management & Training Corporation	\$10,000.00	\$33,073.00	3.0	12	32	2880	1	34	272
SCC03-5	COLUMBIA	City of Vernonia	\$10,000.00	\$15,916.00	1.4	5	44	1770	0	0	0
SCC03-6	COOS	SWOYA Boys and Girls Club	\$10,000.00	\$19,319.65	1.7	9	29	1827	0	0	0
SCC03-7	CROOK	Heart of Oregon Corps	\$10,000.00	\$62,061.00	5.6	13	40	4160	3	45	1080
SCC03-8	CURRY	Northwest Youth Corps	\$10,000.00	\$45,760.00	4.1	10	25	1850	1	33	264
SCC03-9	DESCHUTES	Heart of Oregon Corps	\$10,000.00	\$245,847.00	22.1	44	40	14080	7	45	2520
SCC03-10	DOUGLAS	Phoenix School of Roseburg	\$10,000.00	\$33,683.00	3.0	15	35	4200	0	0	0
SCC03-11	GILLIAM	Mid Columbia Council of Governments	\$10,000.00	\$17,959.00	1.6	4	32	1280	0	0	0
SCC03-12	GRANT	Training and Employment Consortium	\$10,000.00	\$76,050.00	6.9	25	32	6400	1	32	264
SCC03-13	HARNEY	Training and Employment Consortium	\$10,000.00	\$34,248.00	3.1	5	32	1600	0	0	0
SCC03-14	HOOD RIVER	Mid Columbia Council of Governments	\$10,000.00	\$71,818.00	6.5	22	32	7040	0	0	0
SCC03-15	JACKSON	The Job Council	\$10,000.00	\$31,048.00	2.8	6	32	1344	0	0	0
SCC03-16	JEFFERSON	Heart of Oregon Corps	\$10,000.00	\$75,771.00	3.0	20	40	6400	4	45	1440
SCC03-17	JOSEPHINE	The Job Council	\$5,000.00	\$13,305.00	1.2	6	35	1050	0	0	0
SCC03-17B	JOSEPHINE	Northwest Youth Corps	\$5,000.00	\$171,449.00	15.4	10	25	1850	1	33	264
SCC03-18	KLAMATH	Integral Youth Services	\$10,000.00	\$143,650.00	12.9	14	42	4392	0	0	0
SCC03-19B	LAKE	Northwest Youth Corps	\$10,000.00	\$147,734.00	13.3	10	25	1850	1	33	264
SCC03-20	LANE	Looking Glass Youth and Family Services	\$10,000.00	\$29,570.00	2.7	5	32	1280	0	0	0
SCC03-21	LINCOLN	City of Waldport	\$10,000.00	\$11,100.00	1.0	4	38	1216	1	43	340
SCC03-22	LINN	Santiam Canyon School District	\$10,000.00	\$27,361.00	2.5	8	44	2816	0	0	0
SCC03-23	MALHEUR	Training and Employment Consortium	\$10,000.00	\$42,646.00	3.8	10	32	3200	0	0	0
SCC03-24	MARION	The Oregon Garden	\$10,000.00	\$49,484.00	4.5	30	20	3600	3	43	903
SCC03-25	MORROW	CAPECO	\$10,000.00	\$22,810.00	2.1	10	40	2400	0	0	0
SCC03-26	MULTNOMAH	Project YESS	\$5,000.00	\$19,334.00	3.5	10	34	2380	0	0	0
SCC03-27	POLK	Confederated Tribes of Grand Ronde	\$10,000.00	\$62,564.00	5.6	14	40	4480	2	79	1264
SCC03-28	SHERMAN	Mid Columbia Council of Governments	\$10,000.00	\$18,759.00	1.7	4	32	1280	0	0	0
SCC03-29	TILLAMOOK	Nesucca Valley School District	\$8,670.00	\$9,584.00	1.1	6	30	1080	0	0	0
SCC03-30	UMATILLA	CAPECO	\$5,000.00	\$12,516.00	1.1	10	40	1600	0	0	0
SCC03-30B	UMATILLA	Northwest Youth Corps	\$5,000.00	\$25,525.00	2.3	10	14	1050	1	14	112
SCC03-31	UMATILLA	Training and Employment Consortium	\$10,000.00	\$29,981.00	2.7	8	32	2048	2	40	640

SCC03-32	WALLOWA	Training and Employment Consortium	\$10,000.00	\$22,962.00	2.1	5	22	1008	0	0	0
SCC03-33	WASCO	Mt Hood National Forest	\$10,000.00	\$42,717.00	3.9	10	40	3200	0	0	0
SCC03-34	WASHINGTON	Northwest Regional ESD	\$10,000.00	\$11,321.00	1.0	6	27	1053	0	0	0
SCC03-35	WHEELER	Mid Columbia Council of Governments	\$10,000.00	\$11,619.00	1.1	4	32	1280	0	0	0
SCC03-36	YAMHILL	Yamhill County Juvenile Department	\$10,000.00	\$14,450.00	1.3	5	34	1105	1	36	288
TOTAL			\$ 353,670.00								

2003 Marine Board Proposals

MB03-3B	CLACKAMAS	Earth Crusaders	\$8,346.00	\$13,635.00	1.6	6	16	768	1	18	144
MB03-5	COLUMBIA	St Helens School District	\$11,111.00	\$22,350.00	2	6	30	1440	0	0	0
MB03-9	DESCHUTES	Heart of Oregon Corps	\$9,250.00	\$20,250.00	2.2	5	40	1600	1	45	360
MB03-17	JOSEPHINE	The Job Council	\$6,000.00	\$22,778.00	3.8	6	32	1344	0	0	0
MB03-20	LANE	Looking Glass Youth and Family Svcs	\$10,829.00	\$15,525.00	1.4	5	32	1280	0	0	0
MB03-32	WALLOWA	Training and Employment Consortium	\$5,000.00	\$7,250.00	1.5	5	9.6	432	0	0	0
MB03-YRS	VARIOUS	Youth River Steward (OYCC)	\$3,000.00	\$14,900.00	5.0	50	15	40	0	0	0
TOTAL			\$525.00								
TOTAL			\$54,061.00								

2003 State Parks Proposals

SP03-1	BAKER	Training and Employment Consortium	\$12,000.00	\$14,848.00	1	6	34	1632	0	0	0
SP03-3	CLACKAMAS	RiverBend Youth Center	\$7,295.00	\$15,303.00	2.1	6	28	1008	0	0	0
SP03-15	JACKSON	The Job Council	\$9,200.00	\$31,865.00	3.5	6	32	1344	0	0	0
SP03-26	MULTNOMAH	Open Meadow	\$12,000.00	\$37,701.00	2.5	16	16	1792	0	0	0
SP03-34	WASHINGTON	Northwest Regional ESD	\$10,000.00	\$10,003.00	1.0	6	27	1053	0	0	0
SP03-YRS	VARIOUS	Youth River Steward (OYCC)	\$3,000.00	\$14,900.00	5.0	50	15	40	0	0	0
TOTAL			\$53,495.00								
CAT B	MULTIPLE	Northwest Youth Corps	\$98,775.00			30	33	7326			
TOTAL			\$98,775.00								