

SUMMARY OF PROPOSED PRELIMINARY RECOMMENDATIONS
 PORTLAND STATE BUDGET
 2009-10

The proposed preliminary recommendations for the 2009-10 Portland State Budget are built on some important assumptions which are identified below and which are very much subject to change. The State Legislature and Governor are just now engaged in the State budget decision making process. Several key decisions including the level of student tuition and level of salaries are yet to be finally determined. Further, as the State and University move into the next budget year, economic circumstances may require modifications of the beginning year budget during the year. Based on the plan presented below, the total number of vacancies eliminated and layoffs is 68. (Should reduction be higher, the figure could be 108).

BUDGET SHORTFALL & RECOMMENDED ACTIONS:

Expected 22% State appropriation reduction (combined with other adjustments/factors) results in shortfall	\$28,400,000
Expected Tuition Revenue Loss (due to capacity loss)	800,000
Expected Tuition Revenue Increase (based on 13% Res UG/ 10% all other groups and 0% enrollment growth)*	13,500,000
Salary/FTE Reduction/Furlough Days of 4.6%	3,900,000
Overhead Charge Increase 4% (self support/auxiliaries)	1,200,000
Summer Session Contribution Increase	500,000
Reductions in leases/moves/utilities/campus closures and miscellaneous	2,000,000
Services & Supplies Reduction 3%	500,000
Academic (Instructional) Reductions (see attached detail)	1,860,000
Administrative & Academic Support Units Reductions (see attached detail)	4,000,000
Other Administrative Reductions / Revenue Offset	1,740,000

**Enrollment assumption of 0% based on higher tuition growth; if enrollment is higher, additional revenue will cover shortfall, instructional costs, support for instructional costs and required reserve*
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TOTAL PRELIMINARY PROPOSED E & G BUDGET*	\$240,000,000
Minus Unanticipated Shortfall on Above Items	(\$2, 000,000 to 4,000,000)
REVISED TOTAL EDUCATION & GENERAL	\$ 238,000,000 to 236,000,000

**Prior to other revenue adjustments / projections.*

This box recalculates new PLAN A target based on data input from Interactive Area of tab "1 - The Big Picture"

2009-10 Summary of Reduction - ORIGINAL **UNIT TARGETS**

	Adj. BASE Fund 001100	Reduction TARGET 7.50% Fund 001100	Reduction TARGET 12.50% Fund 001100	Reduction TARGET TOTAL Fund 001100
Major Teaching Units:				
CLAS	40,051,798	3,003,885		3,003,885
Undergraduate Studies	5,550,074	416,256		416,256
GSSW	4,353,334	326,500		326,500
SBA	9,200,702	690,053		690,053
GSE	6,538,724	490,404		490,404
MCECS	10,780,935	808,570		808,570
FPA	7,301,478	547,611		547,611
CUPA	10,038,221	752,867		752,867
GSR - System Science	470,657	35,299		35,299
Total Teaching Units	94,285,923	7,071,444	-	7,071,444
Non-Teaching Units:				
GSR	1,241,033		155,129	155,129
Undergraduate Studies - CAE	1,067,618		133,452	133,452
Library	9,780,977		1,222,622	1,222,622
Office of Student Affairs	6,982,098		872,762	872,762
Office of Academic Affairs	1,992,402		249,050	249,050
Office of International Affairs	1,267,997		158,500	158,500
Extended Studies	140,118		17,515	17,515
Total OAA	116,758,166	7,071,444	2,809,030	9,880,475
President's Office	1,956,923		244,615	244,615
General Counsel	684,922		85,615	85,615
University Relations	4,376,757		547,095	547,095
VP Finance & Admin	2,175,187		271,898	271,898
Business Affairs	3,435,884		429,486	429,486
Financial Aid	1,618,447		202,306	202,306
Public Safety	1,366,900		170,863	170,863
Human Resources	2,087,271		260,909	260,909
Facilities & Planning	10,192,979		1,274,122	1,274,122
Office of Info Technology	5,844,261		730,533	730,533
Auxiliary / Box Office	191,377		23,922	23,922
Athletic Support	1,301,225		162,653	162,653
Total Non-OAA Units	35,232,133	-	4,404,017	4,404,017
TOTAL E & G Reduction	151,990,299	7,071,444	7,213,047	14,284,491

2009-10 Summary of Reduction - INTERACTIVE **BEST CASE TARGETS**

	Adj. BASE Fund 001100	Reduction TARGET 5.04% Fund 001100	Reduction TARGET 8.40% Fund 001100	Reduction TARGET TOTAL Fund 001100
Major Teaching Units:				
CLAS	40,051,798	2,018,783		2,018,783
Undergraduate Studies	5,550,074	279,748		279,748
GSSW	4,353,334	219,427		219,427
SBA	9,200,702	463,755		463,755
GSE	6,538,724	329,580		329,580
MCECS	10,780,935	543,406		543,406
FPA	7,301,478	368,026		368,026
CUPA	10,038,221	505,970		505,970
GSR - System Science	470,657	23,723		23,723
Total Teaching Units	94,285,923	4,752,417	-	4,752,417
Non-Teaching Units:				
GSR	1,241,033		104,256	104,256
Undergraduate Studies	1,067,618		89,688	89,688
Library	9,780,977		821,672	821,672
Office of Student Affairs	6,982,098		586,546	586,546
Office of Academic Affairs	1,992,402		167,376	167,376
Office of International Affairs	1,267,997		106,521	106,521
Extended Studies	140,118		11,771	11,771
Total OAA	116,758,166	4,752,417	1,887,830	6,640,247
President's Office	1,956,923		164,396	164,396
General Counsel	684,922		57,538	57,538
University Relations	4,376,757		367,679	367,679
VP Finance & Admin	2,175,187		182,731	182,731
Business Affairs	3,435,884		288,639	288,639
Financial Aid	1,618,447		135,961	135,961
Public Safety	1,366,900		114,829	114,829
Human Resources	2,087,271		175,346	175,346
Facilities & Planning	10,192,979		856,284	856,284
Office of Info Technology	5,844,261		490,960	490,960
Auxiliary / Box Office	191,377		16,077	16,077
Athletic Support	1,301,225		109,312	109,312
Total Non-OAA Units	35,232,133	-	2,959,753	2,959,753
TOTAL E & G Reduction	151,990,299	4,752,417	4,847,583	9,600,000

FY2009-10 PRELIMINARY PROPOSED BUDGET

DRAFT 5/20/2009

Unit	TARGET AMOUNT	Proposed Over (Under) Target	PROPOSED TOTAL AMT	Proposed %	Staff FTE			Academic FTE			Adjunct		GA		Other		
					Vacant FTE	Currently filled FTE	Amt	Vacant FTE	Currently filled FTE	Amt	Adjunct FTE	Amt	GA FTE	Amt	Other Admin Reductions	Other S&S	Other Rev. Sources Offset
CLAS	2,018,783	(485,572)	1,533,211	3.8%	-	7.00	427,592	1.41	2.86	612,473	-	-	4.50	241,781	251,365	-	-
UGS	369,435	(114,238)	255,197	4.5%	-	-	-	-	-	-	4.10	173,275	1.50	35,103	46,819	-	-
SSW	219,427	(50,656)	168,771	3.9%	1.00	-	52,636	-	-	-	0.87	39,924	-	-	-	9,717	66,494
SBA	463,755	(118,540)	345,215	3.8%	-	3.50	230,995	-	0.84	76,070	-	-	-	-	38,150	-	-
GSE	329,580	(55,709)	273,871	4.2%	-	-	-	3.50	-	273,871	-	-	-	-	-	-	-
MCECS	543,406	(126,481)	416,925	3.9%	-	2.40	137,902	-	0.50	75,000	-	-	-	-	-	-	204,023
FPA	368,026	(97,791)	270,235	3.7%	-	2.50	182,157	-	0.50	22,409	-	-	-	-	65,669	-	-
CUPA	505,970	(115,952)	390,018	3.9%	-	0.40	29,269	0.75	-	99,772	1.80	200,187	-	-	49,664	11,126	-
GSR	127,979	62,450	190,429	11.1%	-	-	-	-	-	-	-	-	0.30	10,000	180,429	-	-
LIB	821,672	(188,072)	633,600	6.5%	2.00	-	83,600	-	-	-	-	-	-	-	-	550,000	-
OSA	586,546	(134,046)	452,500	6.5%	2.00	3.00	246,721	-	-	-	-	-	-	-	137,738	59,041	9,000
OAA	167,376	(37,807)	129,569	6.5%	1.00	-	39,470	-	-	-	-	-	-	-	90,099	-	-
OIA	106,521	(26,678)	79,843	6.3%	-	1.00	27,270	-	-	-	-	-	-	-	32,573	-	20,000
XS	11,771	(1,262)	10,509	7.5%	-	-	-	-	-	-	-	-	-	-	-	-	10,509
POF	164,396	48,109	212,505	10.9%	-	2.60	212,505	-	-	-	-	-	-	-	-	-	-
Gen Counsel	57,538	(37,538)	20,000	2.9%	-	-	-	-	-	-	-	-	-	-	-	-	20,000
UNR	367,679	(78,904)	288,775	6.6%	2.00	-	125,775	-	-	-	-	-	-	-	-	163,000	-
FADM VP	182,731	(41,176)	141,555	6.5%	-	1.00	39,200	-	-	-	-	-	-	-	12,355	90,000	-
BAO	288,639	(27,355)	261,284	7.6%	-	1.50	130,518	-	-	-	-	-	-	-	-	83,366	47,400
FAO	135,961	(48,423)	87,538	5.4%	-	1.00	62,288	-	-	-	-	-	-	-	12,110	13,140	-
CPSO	114,829	(37,705)	77,124	5.6%	-	1.00	50,000	-	-	-	-	-	-	-	8,525	18,599	-
HRC	175,346	(28,452)	146,894	7.0%	-	2.00	115,894	-	-	-	-	-	-	-	-	31,000	-
FAP	856,284	(241,983)	614,301	6.0%	-	4.75	489,301	-	-	-	-	-	-	-	25,000	100,000	-
OIT	490,960	(122,576)	368,384	6.3%	-	3.15	270,532	-	-	-	-	-	-	-	-	97,852	-
AUX/BOX	16,077	3,061	19,138	10.0%	-	-	-	-	-	-	-	-	-	-	19,138	-	-
ATH	109,312	99,688	209,000	16.1%	-	-	-	-	-	-	-	-	-	-	209,000	-	-
Total	\$ 9,600,000	\$ (2,003,609)	\$ 7,596,391	5.0%	8.00	36.80	\$ 2,953,625	5.66	4.70	\$ 1,159,595	6.77	\$ 413,386	6.30	\$ 286,884	\$ 1,178,634	\$ 1,226,841	\$ 377,426

FINAL PROPOSAL - DEFAULT PLAN - MODERATE CASE

DRAFT 5/15/2009

Unit	TARGET AMOUNT	Proposed Over (Under) Target	PROPOSED TOTAL AMT	PROPOSED %	Staff FTE			Academic FTE			Adjunct		GA		Other		
					Vacant FTE	Currently filled FTE	Amt	Vacant FTE	Currently filled FTE	Amt	Adjunct FTE	Amt	GA FTE	Amt	Other Admin Reductions	Other S&S	Other Rev. Sources Offset
CLAS	2,439,363	(136,152)	2,303,211	5.75%	-	7.00	427,592	1.41	2.86	612,473	-	-	4.60	241,781	251,365	-	770,000
UGS	446,401	(8,963)	437,438	6.61%	-	-	-	1.00	-	76,776	6.10	278,740	1.50	35,103	46,819	-	-
SSW	265,141	(5,547)	259,594	5.96%	1.00	-	52,636	0.20	-	11,278	1.67	84,010	1.00	26,545	-	18,631	66,494
SBA	560,371	(10,156)	550,215	5.98%	-	3.50	230,995	-	0.84	76,070	2.50	105,000	-	-	138,150	-	-
GSE	398,242	(16,831)	381,411	5.83%	-	-	-	4.50	-	357,986	-	-	1.00	19,771	3,654	-	-
MCECS	656,615	(11,912)	644,703	5.98%	-	2.40	137,902	-	1.00	121,360	-	-	4.00	80,000	45,418	56,000	204,023
FPA	444,698	(7,867)	436,831	5.98%	-	2.75	203,157	1.00	2.00	212,778	-	-	-	-	20,896	-	-
CUPA	611,380	(10,541)	600,839	5.99%	-	2.00	130,651	2.00	-	202,608	1.25	167,617	1.50	30,000	58,837	11,126	-
GSR	154,641	35,788	190,429	11.13%	-	-	-	-	-	-	-	-	0.30	10,000	180,429	-	-
LIB	992,854	(17,854)	975,000	9.97%	7.00	-	346,567	1.00	-	78,433	-	-	-	-	-	550,000	-
OSA	708,744	(12,244)	696,500	9.98%	2.00	3.50	285,661	-	-	-	-	-	0.80	16,060	222,738	139,041	33,000
OAA	202,246	(787)	201,459	10.11%	2.00	-	111,360	-	-	-	-	-	-	-	90,099	-	-
OIA	128,713	(6,975)	121,738	9.60%	-	1.00	27,270	-	-	-	-	-	-	-	32,573	-	61,895
XS	14,223	(3,714)	10,509	7.50%	-	-	-	-	-	-	-	-	-	-	-	-	10,509
POF	198,645	61,309	259,954	13.28%	-	2.10	259,954	-	-	-	-	-	-	-	-	-	-
Gen Counsel	69,526	(49,526)	20,000	2.92%	-	-	-	-	-	-	-	-	-	-	-	-	20,000
UNR	444,279	(5,409)	438,870	10.03%	3.00	-	200,775	-	-	-	-	-	-	-	-	238,095	-
FADM VP	220,800	(2,245)	218,555	10.05%	1.00	1.00	101,200	-	-	-	-	-	-	-	12,355	105,000	-
BAO	348,772	(26,580)	322,192	9.38%	1.00	1.50	191,426	-	-	-	-	-	-	-	-	83,366	47,400
FAO	164,286	38,020	202,306	12.50%	-	3.00	177,056	-	-	-	-	-	-	-	12,110	13,140	-
CPSO	138,752	(11,263)	127,489	9.33%	-	2.00	100,365	-	-	-	-	-	-	-	8,525	18,599	-
HRC	211,876	13,748	225,624	10.81%	0.75	2.75	194,624	-	-	-	-	-	-	-	-	31,000	-
FAP	1,034,676	(14,542)	1,020,134	10.01%	-	7.75	795,134	-	-	-	-	-	-	-	25,000	200,000	-
OIT	593,243	(3,606)	589,637	10.09%	-	4.25	360,718	-	-	-	-	-	-	-	-	228,919	-
AUX/BOX	19,426	(288)	19,138	10.00%	-	-	-	-	-	-	-	-	-	-	19,138	-	-
ATH	132,086	76,914	209,000	16.06%	-	-	-	-	-	-	-	-	-	-	209,000	-	-
Total	\$ 11,600,000	\$ (137,224)	\$ 11,462,776	7.54%	17.75	46.50	\$ 4,335,043	11.11	6.70	\$ 1,749,762	11.52	\$ 635,367	14.70	\$ 459,260	\$ 1,377,106	\$ 1,692,917	\$ 1,213,321

Summary of Proposed Reductions for 2009-2010 - Preliminary E&G Budget (Best Case)

	Unit	Reduction	Subtotals	Description
1	College of Liberal Arts and Sciences	\$ 1,533,211	\$ 504,766	Eliminate 3.5 academic FTE (1.5 vacant).
			\$ 370,143	Reduce staff by 5.0 FTE through layoffs and reorganization of some units.
			\$ 220,000	Reduce course releases to minimum. Increase course size minimums and maximums.
			\$ 241,781	Reduce GA/TA support and instructional activities by 4.5 FTE.
			\$ 196,521	Reduce 2.0 staff FTE and 1.0 academic FTE through position elimination, reorganization and modified contracts for unrepresented and excluded employees.
2	Undergraduate Studies	\$ 255,197	\$ 14,254	Discontinue Core Commitment Project.
			\$ 22,565	Eliminate Faculty-in-Residence position for Retention.
			\$ 39,000	Reduce number of SINQ offerings (.6 adjunct FTE).
			\$ 134,275	Reduce Capstones by 25, increasing class size from 15 to 18. Reduce adjunct faculty by 3.5 FTE.
			\$ 35,103	Eliminate GA Assessment Team (1.5 GA FTE).
3	School of Social Work	\$ 168,771	\$ 10,000	Reduce student wages budget.
			\$ 31,010	Reduce adjunct faculty by .67 FTE.
			\$ 52,636	Eliminate 1.0 vacant staff FTE, Administrative Program Assistant.
			\$ 66,494	Eliminate roster funding for 1.0 FTE fixed-term faculty.
			\$ 5,008	Return salary residuals to central resources.
4	School of Business Administration	\$ 345,215	\$ 4,709	Reduction in services and supplies budget.
			\$ 8,914	Reduction of .2 adjunct FTE.
			\$ 49,654	Eliminate Major Gift Officer position and convert to 9 month instructional faculty.
			\$ 38,150	Eliminate future capital center MBA cohorts.
			\$ 98,954	Eliminate 1.0 staff FTE, Director of Undergraduate Career Services position.
			\$ 40,392	Eliminate .5 staff FTE, Associate Director of Corporate Relations position in the Graduate Programs Office.
			\$ 37,628	Eliminate .5 FTE academic faculty.
5	Graduate School of Education	\$ 273,871	\$ 38,442	Reduction of .34 fixed-term faculty FTE.
			\$ 41,995	Eliminate 1.0 staff FTE.
			\$ 90,274	Eliminate vacant 1.0 FTE tenure track faculty position.
			\$ 76,776	Eliminate vacant 1.0 FTE academic position.
6	Maseeh College of Engineering and Computer Science	\$ 416,925	\$ 60,759	Eliminate vacant 1.0 FTE academic position.
			\$ 46,062	Eliminate vacant .50 FTE fixed term position.
			\$ 76,077	Shift staff FTE to IDC funding.
			\$ 127,946	Shift fixed term faculty FTE to soft funding.
			\$ 137,902	Eliminate 2.4 staff FTE.
			\$ 75,000	Eliminate .50 fixed term faculty FTE.

7	School of Fine and Performing Arts	\$ 270,235	\$ 62,207	Eliminate 1.0 staff FTE.
			\$ 22,409	Reduce 1.0 academic fixed-term position to .5 FTE.
			\$ 20,896	Reconfigure 1.0 FTE 12 month Digital Facilities Manager position to 9 month instructional tenure track position.
			\$ 119,950	Eliminate 1.5 FTE staff positions in Dean's office.
			\$ 44,773	Return salary residuals to central resources.
8	College of Urban and Public Affairs	\$ 390,018	\$ 27,496	Merge PRC into IMS.
			\$ 67,549	Eliminate .5 FTE vacant fixed-term faculty position.
			\$ 11,126	Reduce services and supplies budget.
			\$ 29,269	Reduce staff FTE by .40 across CUPA.
			\$ 10,000	Cut in base funding in NPCC.
			\$ 71,934	Reduce vacant fixed-term faculty FTE by .25 and reduce adjunct FTE by .50. Return salary residuals to central resources.
9	Graduate Studies and Research	\$ 190,429	\$ 180,429	Reduced Research Support.
			\$ 10,000	Eliminate GA position in Systems Science.
10	Library	\$ 633,600	\$ 550,000	Reduce materials budget.
			\$ 83,600	Eliminate 2.0 vacant staff FTE.
11	Office of Student Affairs	\$ 452,500	\$ 98,000	Eliminate 1.5 FTE staff and reduce services and supplies in Records (1.0 vacant).
			\$ 175,000	Eliminate 2.0 FTE staff positions (1.0 vacant) and reduce publications and other activities in ARR.
			\$ 50,000	Reorganize assistive technology.
			\$ 70,000	Reduce Career Center counselor FTE by .50.
			\$ 9,000	Fund orientation handbook with matriculation fee fund.
			\$ 10,500	Reduce E and G funding for CAPS testing.
12	Office of Academic Affairs	\$ 129,569	\$ 39,470	Eliminate 1.0 vacant staff position.
			\$ 90,099	Reduce Provost's strategic investment funds.
13	Office of International Affairs	\$ 79,843	\$ 30,000	Reduce Internationalization Budget.
			\$ 27,270	Eliminate 1.0 Office Specialist 2 (salary and OPE).
			\$ 20,000	Shift rostered salaries/OPE to soft funding.
			\$ 2,573	Director stipend.
14	Extended Studies	\$ 10,509	\$ 10,509	Reduction in SES central funding.
15	President's Office & General Counsel	\$ 232,505	\$ 232,505	Elimination of 2 positions which supported the President in administrative and liaison duties and shifted the cost for contract legal work to construction contracts.
16	University Relations	\$ 288,775	\$ 288,775	Elimination of 2 vacant development officers, reduction of Foundation costs by 12.5% and reduction of advertising budget.
17	Athletics	\$ 209,000	\$ 209,000	Elimination of Wrestling program

18	FADM VP Office	\$ 160,693	\$ 160,693	Elimination of 1 budget analyst position and reduction of Repairs & Equipment maintenance budget and reserve, shifting Box Office and AUX scheduling positions to soft funding or reducing hours.
19	Business Affairs Office	\$ 261,284	\$ 261,284	Elimination of 1 management analyst position and .50 FTE vacant purchasing position, reduction of various vacant position salaries, and savings from suspending monthly paper bill production and going to electronic bills.
20	Financial Aid Office	\$ 87,538	\$ 87,538	Elimination of 1 vacant student processing position, and reduction of student wages and travel.
21	Campus Public Safety Office	\$ 77,124	\$ 77,124	Elimination of 1 support position and reduction of student wages and S&S
22	Human Resources Center	\$ 146,894	\$ 146,894	Elimination of 2 positions in Human Resource operations and savings from Employee Assistance
23	Facilities and Planning	\$ 614,301	\$ 614,301	Elimination of 4.75 FTE throughout the unit as well as shifting some positions to soft funds. Other savings from reduction of mail delivery to once per day and reduction of utility budget by 4.25%.
24	Office of Information Technology	\$ 368,383	\$ 368,383	Elimination of 3 positions within the department, reduction of some software licenses and memberships, and various reductions in licenses and linkage services.
	Subtotal	\$ 7,596,390	\$ 7,596,390	Total

Eight Guiding Principles for the Budget Planning Process (2009-2011)

January 20, 2009

Overview

Budget allocation decisions will be:

1. Conducted in a deliberative, participatory, and transparent manner.
2. Balanced, recognizing the important role of academic and administrative support in promoting student success, faculty productivity, and overall program quality.
3. Based on programmatic contributions to one or more of the five guiding themes and the associated initiatives, including Provide Civic Leadership, Improve Student Success, Achieve Global Excellence, Enhance Educational Opportunity, and Expand Resources and Improve Effectiveness.

Budget allocation decisions will:

4. Recognize the need to support faculty and staff, who are key to advancing the five guiding themes.
5. Recognize the primacy of instruction and research.
6. Support policies that increase revenue streams justified by the market and mitigate actions that impact student access.
7. Address the immediate, short-term budget issues while ensuring that the University emerges in the strongest possible position to lead higher education in the Portland metropolitan region in the long term.
8. Acknowledge that local administrators are in the best position to recommend allocations within their units but recognize the ultimate budget authority of the President.

Guiding Principles

1. Budget allocation decisions will be conducted in a deliberate, participatory, and transparent manner. Work with the appropriate faculty governance and administrative bodies, soliciting input from all stakeholders and providing information on a regular basis.

EXAMPLES OF POTENTIAL ACTIONS

- Hold open budget forums
- Meet regularly with the Faculty Senate Budget Committee
- Consult regularly with the Council of Academic Deans and the FADM Council
- Make regular reports to the Faculty Senate
- Communicate regularly to the campus using Portland State Currently

2. Budget allocation increases will be balanced, recognizing the important role of academic and administrative support in promoting student success, faculty productivity, and overall program quality. Recognize that faculty and students are most successful when they are provided effective administrative as well as academic support.

EXAMPLES OF POTENTIAL ACTIONS

- Maintain adequate service unit staff to conduct business processes for student registration and financial aid

Eight Guiding Principles (CONT.)

January 20, 2009

3. Budget allocation decisions will be based on programmatic contributions to one or more of the five guiding themes and associated initiatives.

PROVIDE CIVIC LEADERSHIP—Lead as a civic partner, deepen our engagement as a critical community asset, demonstrate leadership in regional innovation, serve as an anchor institution in the Metro area.

EXAMPLES OF POTENTIAL ACTIONS

- Maintain and continue efforts to:
 - > Co-design economic development strategies with city and the University
 - > Contribute to economic development of the Portland metropolitan region and the state of Oregon

IMPROVE STUDENT SUCCESS—Ensure a student experience that results in higher satisfaction, retention and graduation rates.

EXAMPLES OF POTENTIAL ACTIONS

- Implement recommendations from the First Steps for Student Success Committee

ACHIEVE GLOBAL EXCELLENCE—Distinguish the institution nationally and internationally through the accomplishments of its faculty, reputation of its programs, and preparation of its students for the new “Flat” world.

EXAMPLES OF POTENTIAL ACTIONS

- Improve academic program quality by continuing our commitment to:
 - > Increase tenure-line faculty
 - > Conduct regular, meaningful assessment of program outcomes
 - > Provide distinctive community based learning opportunities

ENHANCE EDUCATIONAL OPPORTUNITY—Ease the transition and create more effective pathways for students to move from K-12 to higher education.

EXAMPLES OF POTENTIAL ACTIONS

- Improve pathways to higher education:
 - > Maintain efforts with K-12 and community colleges, particularly for under-represented groups
 - > Increase online learning opportunities

EXPAND RESOURCES AND IMPROVE EFFECTIVENESS—Expand resources in each of the funding streams (national, state, private, business partnerships, research, tuition), manage resources effectively, and match investments to strategic priorities.

EXAMPLES OF POTENTIAL ACTIONS

- Continue to build capacity to attract external funding through focused investment in program development
- Limit or eliminate low enrollment courses (e.g. set minimum enrollment standards for undergraduate and graduate courses and plan curricular offerings based on enrollment in previous years)
- Continue to monitor academic program productivity and cost and consider reduction in funding for those programs where the productivity is low compared to the resources allocated and cost
- Carefully assess space allocation and utilization to minimize lease costs
- Evaluate organizational and operational issues for effectiveness and efficiency over the long term
- Identify and implement organizational and operational changes that improve efficiency and effectiveness

Eight Guiding Principles (CONT.)

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4. Budget allocation decisions will recognize the need to support faculty and staff, who are key to advancing the five guiding themes. The strength of the University is dependent on accomplished faculty and staff, and there is administrative commitment to ensuring necessary staffing and competitive compensation.

EXAMPLES OF POTENTIAL ACTIONS

- In the array of possible actions to reduce budgets in the short term, support for faculty & staff will continue to be a high priority

5. Recognize the primacy of instruction and research.

EXAMPLES OF POTENTIAL ACTIONS

- Preserve instruction to help ensure students' progress toward degree completion.

6. Budget allocation decisions will support policies that increase revenue streams and mitigate actions that impact student access. Revenue enhancement is an alternative to budget reduction and can allow the institution to continue to provide access to the range of academic programs that are required to support the educational needs of the metropolitan region.

EXAMPLES OF POTENTIAL ACTIONS

- Increase and enhance private and other external support for the University
- Enhance support services to promote improved retention
- Consider differential tuition for selected undergraduate and graduate programs based on market demand*
- Invest in programs where additional enrollments produce tuition revenue in excess of the investment required for program expansion
- Increase the numbers of non-resident students who pay full (or nearly full) non-resident tuition rates
- Increase resident undergraduate tuition*
- Provide incentives for those faculty with externally funded research to cover a portion of their salaries (currently assigned to the E&G budget) from grant funding

*Reserve some funds for mitigating increased student expense.

7. Budget allocation decisions will address the immediate, short-term budget issues while ensuring that the University emerges in the strongest possible position to lead higher education in the Portland metropolitan region in the long term. Meet the needs of budget reductions for 2009-11 while ensuring the institution's long-term standing. View the current situation as part of a cycle, not a permanent condition; the approach to budget management and planning will reflect this dynamic. Decisions will be made to manage our way through this situation using all of the tools we have available.

EXAMPLES OF POTENTIAL ACTIONS

- Delay the refilling of selected positions – both administrative and academic
- Use the fund balance – both centrally and in the academic units – as one tool to address short falls on a temporary basis to maintain our ability to serve students through instructional and other support services
- Explore unit-specific, multi-year approaches to achieving biennial reductions in expenses
- Delay or suspend the implementation of any new academic program where the tuition generated by additional students does not cover the investment required to offer the program
- Consider institution-wide approaches to managing through the budget shortfall by:
 - > Establish a temporary salary (or FTE) reduction

Eight Guiding Principles (CONT.)

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- > Reduce or suspend non-essential travel and purchases
- > Establish a temporary teaching load increase of one class (or two) over the two-year period for tenure-line faculty, especially those who are not research active

8. Budget allocation decisions will acknowledge that local administrators are in the best position to recommend allocations within their units but recognize the ultimate budget authority of the President. Local administrators should be responsible for managing their budgets in the best interest of both the unit and the institution and consistent with agreed upon budget principles as well as controls and guidelines to be developed by the University. At the same time, the president retains ultimate authority and may have to decide on centralized measures for the good of the institution.

EXAMPLES OF POTENTIAL ACTIONS

- Continue to work with administrative groups such as the Council of Academic Deans and administrative directors in developing strategies for cost reduction