Year Three
Self-Evaluation Report

Prepared for the
Northwest Commission on Colleges and Universities

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(Year One revised)
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Introduction

As a complex organization facing new challenges and opportunities, Portland State University continues to reflect on basic questions surrounding its curriculum, pedagogy, management and community engagement. Portland State University’s evolving role as a leading urban-serving university has prompted adjustments to its policies, procedures and practices. Changes in the external environment, continuing declines in state appropriations, and limitations in space and facilities require the institution to be innovative in its plans and activities. Through reorganization, new leadership, new funding strategies, agreements with local, regional and international partners, and innovations that have improved services for students, faculty, staff and the community, Portland State University has been successful in using creative and flexible planning to further its mission and goals. The four Core Themes described in this report, integrated with President Wim Wiewel’s five guiding themes for institutional planning, provide a framework for accountability and continuous improvement.

Institutional Overview

Portland State University is a dynamic public urban university, widely regarded as a leader on the national higher education landscape. Beginning in the early 1990s the University defined and embraced its identity as an innovative and engaged institution. Its location in the heart of downtown Portland, Oregon, supports partnerships between the university and the city that create community-based learning experiences for students and teaching and research opportunities for faculty. Placed on a sky bridge over a major downtown thoroughfare, the University’s motto, “Let Knowledge Serve the City,” reflects the importance Portland State University places on its relationship with the city and the region.

Portland State University’s approach to learning, engagement and research serves as a model for other higher education institutions. The innovative general education curriculum, University Studies, is nationally acclaimed for its integration of community engagement and interdisciplinary teaching and learning across the four years of the program. Partnerships with other higher education institutions in the region, such as Oregon Health & Sciences University, and with public and private organizations, such as the Portland Development Commission and Portland General Electric, create opportunities for faculty and students to engage in cutting-edge research in a variety of areas, including health and sustainability-related fields, business, urban planning, engineering and social work. Connections with the city’s arts community enable students to learn from professional artists in a thriving urban environment, while the joint emphasis of Portland State University and the City of Portland on sustainable urban futures provides a laboratory for applied research on transportation and energy alternatives, as well as the development of social structures to support a green future.

As Oregon’s public urban university, Portland State University provides educational opportunities to students who are demographically, financially and academically diverse. This has prompted the University to be innovative in its approach to both undergraduate and graduate education, defining “access” to include a wide range of courses and programs and flexibility in course scheduling and formats. Initiatives focused on improving undergraduate student retention and completion have resulted in collaborative efforts by academic and student affairs professionals to ensure that advising, student services and co-curricular activities support a diverse student body in achieving success. Central to Portland State University’s mission are strong graduate professional
programs and an array of programs in the liberal and performing arts that meet the needs of the region and beyond. The University offers a variety of educational and research opportunities through more than 70 masters and 18 doctoral programs, and Portland State University serves more graduate students than any other institution in Oregon. The growing research enterprise creates opportunities for faculty and graduate students to create new knowledge and to work with community partners in applying knowledge to real-world problems.

Growth in enrollment, in research productivity, in graduate programs, and in the numbers of full and part-time faculty, as well as substantial expansion of the physical boundaries of the campus, has created both challenges and opportunities. Pressure on classroom space and the need to add nontenured full-time and adjunct part-time faculty have prompted initiatives to improve curricular efficiency and effectiveness. Increasing demands for online student services, including admissions, registration and financial aid, have required additional investments in hardware, software and personnel to support them. These pressures have led to the adoption of better planning and management strategies that can help position the university for the future. Table 1 shows the magnitude of growth in enrollment, research, programs and space over the past 10 years.

Table 1. Growth at Portland State University from 2000-2001 to 2010-2011

<table>
<thead>
<tr>
<th></th>
<th>2000-2001</th>
<th>2010-2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Enrollment</td>
<td>20,026</td>
<td>29,818</td>
</tr>
<tr>
<td>Research Expenditures</td>
<td>$26.4m</td>
<td>$61.1m</td>
</tr>
<tr>
<td>Graduate Programs</td>
<td>51</td>
<td>88</td>
</tr>
<tr>
<td>Full-Time Faculty</td>
<td>590</td>
<td>888</td>
</tr>
<tr>
<td>Part-Time Faculty</td>
<td>332</td>
<td>676</td>
</tr>
<tr>
<td>Square footage</td>
<td>3.91m</td>
<td>4.87m</td>
</tr>
</tbody>
</table>

During this growth, the state of Oregon has disinvested in higher education, reducing the amount of state appropriations to the Oregon University System over the past decade. The trend is likely to continue, and has become a major challenge facing the University. In 2010-2011, the Financial Futures Task Force recommended adoption of a new budget allocation model to address core institutional needs. As a consequence, Portland State University is now moving to a performance based budget model which will encourage revenue generation and allow the University to control its resources in the most effective manner to support the mission and goals of the institution. The increasing dependence on tuition revenues to make up for declining state dollars, especially during the current economic downturn, has prompted a greater emphasis on enrollment management and student success initiatives. In addition, the focus on institutional advancement and development activities has increased, adding a new emphasis on fund raising to the mix of revenue sources for the campus.

The following sections of this report describe how Portland State University sets goals and evaluates its progress toward mission fulfillment.

Preface

Brief update on institutional changes since the institution’s last report

The most recent report submitted to NWCCU was the Fall 2010 Regular Interim Report. Since
fall 2010, the University has filled vacancies in several executive leadership positions and has made a significant change in the reporting structure for student affairs. At the beginning of the 2011-2012 academic year, Monica Rimai joined Portland State University as the Vice President for Finance and Administration; Dr. Susan Beatty was named Dean of the College of Liberal Arts and Sciences; and Dr. Jackie Balzer was promoted from a vice provost position in Academic Affairs to Vice President of Enrollment Management and Student Affairs, reporting directly to the President. This change was intended to increase the campus-wide focus on student success and enrollment management as key institutional priorities. Searches for the Provost and Vice President of Academic Affairs, the Dean of the School of Social Work and University Librarian have been concluded with the appointment of Dr. Sona Karentz Andrews, Dr. David Springer, and Marilyn Moody respectively.

Response to topics previously requested by the Commission (i.e., Addenda)

The NWCCU did not issue any recommendations based on its evaluation of the Fall 2010 Regular Interim Report.

Chapter One: Mission, Core Themes, and Expectations

Executive Summary of Eligibility Requirements 2 and 3

Eligibility Requirement 2:
Portland State University’s mission was reviewed and adopted by the Oregon University System Board in 1991 and amended and approved in 1999.

Eligibility Requirement 3:
Portland State University’s mission statement is filed with the Oregon University System Board’s office and appears on the University’s website and in the University’s catalog, the Bulletin (Standard 1.A.1).

Standard 1.A Mission Statement

“The mission of Portland State University is to enhance the intellectual, social, cultural and economic qualities of urban life by providing access throughout the life span to a quality liberal education for undergraduates and an appropriate array of professional and graduate programs especially relevant to metropolitan areas. The University conducts research and community service that support a high quality educational environment and reflect issues important to the region. It actively promotes the development of a network of educational institutions to serve the community.”

Portland State University embraces its role as the public university located in the state’s largest metropolitan area, providing educational opportunities to meet the needs of a diverse population and by conducting globally-significant, locally-relevant research that creates new knowledge and contributes to the economic, social and cultural development of the region and beyond. Four Core Themes align with the University’s mission. They are:

- Community Engagement and Civic Leadership: This theme reflects Portland State University’s practice of engaging the community in its educational and research activities and its role as a civic leader, working with local and regional communities to “enhance the intellectual, social, cultural and economic qualities of urban life” and provide “community service that … reflect(s) issues important to the region.”
Student Success: Portland State University “values intellectual inquiry in its undergraduate and graduate programs” and maintains “a welcoming and stimulating environment that is conducive to success for students.”

Innovative Research and Scholarship: Portland State University “conducts research…that support(s) a high quality educational environment and reflects issues important to the region.”

Educational Opportunity: The University provides “access throughout the lifespan to a quality liberal education for undergraduates and an appropriate array of professional and graduate programs” and “promotes the development of a network of educational institutions to serve the community.”

The Core Themes are echoed in President Wiewel’s “Blueprint for the Future.” The Blueprint guides an annual strategic planning process focused on goals and outcomes that form an action plan for the year. The process is organized by five guiding themes aligned with the University’s mission:

- Provide Civic Leadership Through Partnerships: Lead as a civic partner, deepen our engagement as a critical community asset, demonstrate leadership in regional innovation, and serve as an anchor institution in the Metro area.
- Improve Student Success: Ensure a student experience that, results in higher satisfaction, retention, and graduation rates.
- 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 global economy.
- Enhance Educational Opportunity: Ease the transition and create more effective pathways for students to move from K-12 to higher education.
- Expand Resources and Improve Effectiveness: Expand resources in each of the funding streams (state, private, business partnerships, research, and tuition), manage resources effectively, and match investments to strategic priorities.

Interpretation of mission fulfillment

Standard 1.A.2: The institution defines mission fulfillment in the context of its purpose, values, and characteristics. Within that definition, it articulates institutional achievements, outcomes, or expectations that represent an acceptable threshold or extent of mission fulfillment.

The four Core Themes provide a means for organizing “achievements, outcomes and expectations” in fulfillment of the University’s mission as an engaged, urban-serving institution, as illustrated in Diagram 1 (pg. 6). In order to monitor progress toward mission fulfillment and to ensure accountability and improvement, objectives and indicators have been articulated under each theme to “…represent an acceptable threshold or extent of mission fulfillment,” as shown in Table 2 (pg. 15). In many cases, the indicators demonstrate overlap and integration of the four themes as they are expressed through institutional actions and initiatives. Beginning in 2011-2012, the approach to monitor and evaluate these objectives will include both qualitative and quantitative measures. The institution will create a matrix that identifies the progress of the indicators and whether progress is being met, needs improvement, or is exceeding expectations. Information from internal data bases and other
information gathered through external documents or through interviews with stakeholders in the community will be combined to create a more complete picture of the impact and effectiveness of Portland State University’s activities under its mission.

In the 2011-2012 academic year, the Office of Institutional Research and Planning (OIRP) will prepare three-year trends for each of the quantitative indicators. Based on a review of the initial trend data, short and long term goals for performance and improvement and a threshold of mission fulfillment will be developed. This achievement data will be shared with the appropriate governance body and progress will be monitored by OIRP and recommendations for improvements will be vetted by the various governance bodies.

The assessment of Core Themes will be aligned with President Wiewel’s strategic planning process, which monitors and reports on achievement of annual goals and expectations for the campus. At mid-year and again at the end of the academic year, the President provides the campus with an update on planning activities, both electronically on the Portland State University website and through public meetings open to the campus community. Efforts are underway to link Portland State University’s electronic institutional portfolio with improvements in the University’s data management system so that information on performance and achievement of goals and outcomes may be provided publicly through the institution’s website.

In addition to these internal monitoring and assessment activities, Portland State University participates in the annual Oregon University System Performance Report, which measures institutional and system-wide progress using a set of common and institution-specific indicators. The indicators are organized under four goal headings: Student Progress and Completion, Academic Quality and Student Success, Educated Citizenry and Workforce Development, and Knowledge Creation and Philanthropy. In keeping with its mission and core themes, Portland State University’s institution-specific indicators are Participation in Courses with a Community Service Learning Component and Research and Development Expenditures in Science and Engineering. Reported annually, the achievement targets for these two indicators are included in the strategic planning process, along with action steps for improvement.
Diagram 1, Mission and Core Themes

Portland State's mission is to enhance the intellectual, social, cultural and economic qualities of urban life and provide community service that...reflect(s) issues important to the region.

Portland State values intellectual inquiry in its undergraduate and graduate programs and maintains a welcoming and stimulating environment that is conducive to success for students...

Community Engagement and Civic Leadership

Innovative Research and Scholarship

Student Success

Educational Opportunity

Standard 1.B Core Themes

Core Theme 1: Community Engagement and Civic Leadership

Engagement and Student Learning

Portland State University’s identity is defined generally by its urban location and specifically by its location in Portland. Community engagement is central to Portland State University’s approach to teaching, learning, and research. Located in the core of Oregon’s largest metropolitan area, Portland State University takes advantage of a wide variety of opportunities for community engagement by integrating these opportunities into both the undergraduate and graduate curriculum. One important example of this is the Senior Capstone, offered through the undergraduate University Studies general education program, in which multidisciplinary groups of students, led by a faculty expert or a community partner, work together to address real-world problems or issues.
Other community-based learning courses, practica and internships are offered across the curriculum, including courses offered in international contexts, allowing students to apply what they have learned in their major and in their other courses to a challenge or issue faced by the metropolitan community. In addition, Portland State University connects students and faculty to the global community through its relationships with international universities and organizations, providing and teaching, learning and research opportunities that reflect an expanding notion of engagement and community.

Objectives
1. Provide a curriculum that leads to the achievement of the undergraduate Campus-Wide Learning Outcome for engagement.
2. Establish and maintain partnerships that impact student learning and meet community needs.

Indicators
- Student participation in Capstone and Community-Based Learning (CBL) courses.
- University Studies annual reports.
- Program assessment reports that document students’ achievement of the undergraduate engagement learning outcome.

Civic Leadership
Portland State University is actively engaged with the community through a wide array of civic partnerships and economic relationships and provides a strong leadership role in addressing issues important to the city and the region. Members of the campus community actively participate in civic life, serving in organizations and on boards, task forces or commissions focused on improving the quality of life in the region and on developing strategies to promote sustainable urban futures. Partnerships with the City of Portland have resulted in the formation of a ‘University District Plan’ to enhance the economic viability of the South Waterfront area. The plan includes further development of public transportation options, including light rail, streetcar service, bike lanes, and mixed-use construction that includes provision of spaces for classrooms and research along with spaces for retail locations and businesses.

Portland State University’s economic impact runs deep in the metropolitan area. The institution is a leading employer, workforce developer, purchaser, small business cultivator, researcher and real estate developer. In the 2009-2010 fiscal year, the institution demonstrated an economic impact of more than $1.4 billion. Efforts are underway with the City of Portland and the Portland Development Commission (PDC) to align strategic goals and utilize resources and expertise for the betterment of the region in such areas as job creation, sustainable development, access expansion, and service as a “think tank” for regional planning. Through a strategy of improved communication and coordination with partners and aligning its efforts with regional economic and development goals and continuing to plan and develop partnerships, Portland State University continues to play a major leadership role.

Objectives
1. Provide leadership in areas vital to the urban and metropolitan area.
2. Contribute to the social and economic vitality of the region through partnerships.
Indicators

- Reports of social and economic impact on the metro area and region.
- Reports on partnerships.

Rationale for Objectives and Indicators

The University places a high priority on partnerships that foster community impact and enhance teaching, learning, and research opportunities for faculty and students. As a “steward of place,” Portland State University views these activities as core to its mission. Objectives and indicators for this Core Theme are part of the ongoing assessment of institutional performance and include measures that are routinely monitored and evaluated by the campus leadership.

For example, the vice presidents for research and strategic partnerships and finance and administration are developing strategies to enhance the infrastructure support and financial sustainability of efforts to increase strategic partnerships and the growing research enterprise. Along with this, the Provost has mandated annual faculty activity reporting as part of academic planning. Faculty productivity in a variety of areas, including community engaged research and scholarship, is collected through an on-line faculty vita database and reported with other department and school/college-level planning indicators during winter term of each year. As mentioned earlier, student participation in community-based learning is included in annual performance reporting to the Oregon University System and in the annual strategic planning process. One measure of the impact of student participation in community-based learning courses is the assessment of the Campus-Wide Learning Outcome on engagement, which is included in the annual program assessment process. The number, type and location of partnerships also are monitored and reported internally by the Vice President for Research and Strategic Partnerships. New efforts to assess the impact of these partnerships on the campus and on the community will be developed as part of institutional strategic planning activities. Research expenditures are included in annual performance reporting at the system level are and also monitored by the Vice President for Research and Strategic Partnerships.

Core Theme 2: Student Success

Portland State University serves a diverse population of learners, including large numbers of first-generation college students, transfer and part-time students, older or returning students, students of color and low-income students, as well as graduate students and those seeking career advancement. This diversity challenges traditional measures of undergraduate student success and calls for innovative strategies to ensure that access and opportunities result in the achievement of educational goals. Portland State University’s growing commitment to student success includes two important dimensions: offering and assessing high quality academic programs and providing support activities that increase the likelihood of student retention throughout the academic experience, with degree completion as the goal.

Assessment of Student Learning

Program-level assessment at the undergraduate and graduate levels, along with the broader assessment of eight undergraduate Campus-Wide Learning Outcomes (CWLOs), is central to the
institution’s efforts to provide a high quality academic experience for all students. Assessment activities support the notion that students learn best when they have a clear framework of expectations for their education. Taken together with programmatic learning goals and outcomes, the eight undergraduate learning outcomes help students understand what is expected of Portland State University graduates and provide them with a way to gauge their own learning. Co-curricular activities, provided through the programs and services offered by the Office of Student Affairs, are viewed as a key piece of the student experience and are regularly assessed. Results are shared with through the Institutional Assessment Council, which includes both academic and student affairs faculty and professionals.

Along with assessment of student learning outcomes, the University is committed to ongoing review of its academic programs. The annual planning process includes reporting and analysis of productivity indicators under four broad headings: students, academics, financials, and facilities. A revised program review process will include core components of the annual planning process and will allow units that participate in specialized accreditation to provide evidence provided to external evaluators as part of their internal review requirements.

Objectives
1. Provide regular, meaningful assessment of student learning at the undergraduate and graduate levels.
2. Ensure high quality programs through a program review process for undergraduate and graduate programs.

Indicators
- Assessment reports that document students’ achievement of undergraduate Campus-wide Learning Outcomes.
- Program assessment reports that document student learning in departments and programs at the graduate and undergraduate level.

Completion Rates
Student success in graduation is supported by a portfolio of initiatives led by a team of academic and student affairs faculty and professionals. Campus dialogues on improving retention led to the formation of the First Steps for Student Success and Retention Committee, which set forth a set of recommendations for specific actions that would lead to improvement in retention and graduation rates for both freshman and transfer students. At the heart of the initiatives and actions undertaken as a result of these recommendations are two key principles: improve student success, and support institutional goals. The initiatives demonstrate commitment to a student experience that will result in higher satisfaction, retention and graduation rates. Specific features of these initiatives include assessment of preparedness, early identification of students at risk, improved communication, addressing financial concerns, and supporting timely progress to graduation.

New resources and leadership provide momentum for these initiatives. An important position is the Associate Vice Provost for Undergraduate Student Success and Dean of Undergraduate Students, who coordinates various projects across all units, raising the visibility of student success activities. As mentioned earlier, the position of Vice Provost for Student Affairs has
been changed to Vice President for Enrollment Management and Student Affairs, thus creating a new executive level position that places an increased focus on success as a campus priority.

A significant effort has been made to improve student advising and orientation, including several major initiatives: the hiring of 14 new advisers in the schools/colleges in collaboration with Student Affairs, mandatory student orientation and first-year advising, and the implementation of new placement and degree mapping tools. One focus of these efforts will be to identify at-risk students earlier and provide interventions to help them make timely progress toward their academic goals.

Transfer students comprise the largest portion of the undergraduate class and their success is a top priority for the campus. Articulation agreements with key community college partners, such as Portland Community College, Mt. Hood Community College, Clackamas Community College, and Chemeketa Community College, help establish clear pathways that foster student access and opportunity and success. The highly-successful co-admission agreement with Portland Community College, which has helped student participating in the program graduate at higher rates than other transfer students, has been renewed and strengthened. These efforts demonstrate a collaborative, data-driven approach to student success for all undergraduates.

Objectives
1. Improve completion rates for freshman and transfer students.
2. Provide curricular and co-curricular activities and students services that support success.

Indicators
- Co-admitted student graduation rates.
- Freshman and transfer student graduation rates.
- Degrees granted.
- Student Services that support curricular and co-curricular activities.

Rationale for Objectives and Indicators

Portland State University has made student success a high priority and has put in place a number of initiatives to support its goals in this area. The Office of Student Affairs monitors student participation in advising and orientation and makes regular reports to the President’s Executive Committee and the Council of Academic Deans. Student retention and graduation rates are reported annually for both freshman and transfer students by OIRP. As mentioned earlier, the Center for Academic Excellence has developed a process for monitoring the achievement of student learning outcomes across all undergraduate and graduate programs and produces an annual report on program and campus-wide learning outcomes.

Core Theme 3: Innovative Research and Scholarship

Research and scholarship at Portland State University are characterized by faculty and students working in close collaboration with community partners or in multidisciplinary teams on “globally significant and locally relevant” questions and issues. One important aspect of the growing research agenda, and of many of the institution’s graduate programs, is active engagement with the urban environment. A wide range of topics, such as transportation, urban planning, social work,
nano-materials and fabrication, health and life sciences and K-12 pathways, reflects both Portland State University’s urban character and the social, cultural and economic development needs of the region and the state. A major thrust of research and scholarship activities is sustainability, which takes a multidisciplinary approach including the sciences, social sciences, humanities, the arts and an array of professional programs. Faculty experts on solar cells, pollution, climate change, healthy living, biotechnology, and public policy making are enhancing Portland State University’s reputation as a research institution focused on developing sustainable practices.

Partnerships with other higher education institutions in the state, such as those with the Oregon Health & Sciences University (OHSU) and Innovate Collaborate Oregon (ICO), a partnership between Portland State University, Oregon State University, University of Oregon and Oregon Health & Sciences University, help develop programs that meet regional needs and foster interactions between industry and Oregon’s research universities. These relationships also provide opportunities for faculty and students to conduct collaborative, multidisciplinary research and to bring this work to bear in the curriculum.

Multidisciplinary approaches to research and scholarship give graduate students a solid foundation in disciplinary knowledge, and also prepare them for collaborative research. Some specific examples of this can be seen in the doctoral degree in Public Affairs and Policy, administered through the Hatfield School of Government, and the Integrative Graduate Education and Research Traineeship (IGERT) program coordinated by Institute for Sustainable Solutions. The Innovation & Industry Alliances (IIA) works with research teams from across the institution and with organizations around the world, to maximize the impact of innovation. IIA uses trademark, patent, and copyright to achieve Portland State University researchers’ goals for their innovations. IIA also works with Oregon companies through the Portland State Business Accelerator, which helps to incubate businesses and creates new jobs and many companies function as licensees of innovations developed at the University.

Additional information on Portland State University’s research activities, strategic partnerships, economic impact, and innovation can be found at research and strategic partnerships webpage.

Objectives
1. Increase sustainability and interdisciplinary research.
2. Provide opportunities for student participation in research at undergraduate and graduate levels.
3. Increase research that reflects the University’s urban character and addresses the needs of urban communities

Indicators
- Research expenditures overall and expenditures in Institute for Sustainable Solutions.
- Number of graduate research assistantships.
- Number of graduate degrees awarded and percentage of total degrees.
- Institute for Sustainable Solutions annual reports.
- Office of Sponsored Research annual reports.
Rationale for Objectives and Indicators

A key piece of the mission statement is research and community service that addresses issues important to the region. Sustainability is an important piece of research, instruction, and the overall life of the campus. The Office of Research and Strategic Partnerships annually reports research expenditures for sponsored research and is developing methods for identifying sustainability and interdisciplinary research. As mentioned earlier, partnership information is regularly collected and monitored and processes for assessing the impact are underway.

Core Theme 4: Educational Opportunity

A key piece of Portland State University’s urban-serving mission is to provide educational opportunities to metropolitan, regional and international communities. This includes a commitment to diversity and the provision of opportunities to all populations in the urban area. As the most diverse university in Oregon, Portland State University creates a welcoming climate for students from all backgrounds. Multiple constituencies look to the University to provide opportunity and leadership: first-generation and returning students, the Latino/a community, veterans, people with disabilities, career professionals seeking advancement, and many others.

Providing Opportunities

Part of this commitment to opportunity is to provide students with a range of choices in their educational careers, as well as flexibility in scheduling and mode of delivery. The variety of educational programs for undergraduate and graduate students ranges from degrees in the traditional humanities, social science and science disciplines to an array of professional programs particularly suited to the needs of the metropolitan region. The richness of academic programs in the schools and colleges demonstrates Portland State University’s commitment to serving the needs of the metro region.

Portland State University also provides course offerings in various locations, times and through alternative modes of delivery. Courses and programs are available at off-campus locations, some in partnership with area community colleges. In addition, evening courses are a mainstay of the professional programs, as are weekend offerings for selected professional programs. The institution is a member of the Western Interstate Commission for Higher Education (WICHE), which fosters access and opportunity for out-of-state students to selected undergraduate and graduate programs.

Portland State University emphasizes improving college readiness and K-12 and community college pathways for students to attend university. Partnerships with high schools and community colleges have helped to engage different communities and to enable students to envision themselves as learners with the expectation that they will attend university. Dual degree courses in the high schools are a mechanism for encouraging students to experience college-level courses and help them gain a head-start on their degree programs. Other programs that create pathways to a college degree are the University Studies’ Freshman Inquiry courses offered in some regional high schools and the Challenge/LINK program that provides college credit for courses taken in high school. In
collaboration with various community partners, including the K-12 systems and various government and non-profit agencies, Portland State University has created an approach called SUCCESS (Schools, University, and Community Collaborating for Educational Success for all Students), which includes a comprehensive plan for how Portland State University can help participate in the PK20 education continuum.

Providing educational opportunity also includes preparing students for postgraduate education. One expression of this commitment is the Ronald E. McNair Program, which prepares first-generation college students for graduate studies by providing mentoring and research experiences. The University Honors program and the Scholarly and Creative Activity Grants for undergraduate research are additional examples of efforts to prepare students for graduate programs. Inter-institutional agreements have also established educational opportunities in which undergraduate students who meet established academic criteria are guaranteed admission into graduate programs.

Objectives
1. Through strategic investments, provide a full range of undergraduate and graduate programs in disciplines relevant to the region that are accessible to a broad range of students.
2. Partner with other education institutions in the metropolitan area to create a seamless and more effective system to support opportunities for students from preschool to graduate school.

Indicators
- Current list of undergraduate and graduate programs.
- Trends data for student credit hours in online courses.
- SUCCESS Initiative reports.

Opportunities for Diverse Populations
Portland State University is committed to supporting students from a variety of backgrounds and experiences. During 2010-2011, a Chief Diversity Officer was hired to lead a newly-formed Office of Diversity and Inclusion. The Office works closely with student and academic affairs to support student success and to set targets for increased minority student recruitment and enrollment. One collaborative effort designed to meet the needs and demands of the rapidly growing Hispanic population of the region is “Exito!” a program created in 2010 to increase efforts to recruit, retain, and graduate more Latino students.

One of the eight CWLOs is internationalization. Fulfillment of that learning outcome requires provision of international experiences for all students, as well as hosting experiences for students from abroad whose presence on campus and in the classroom enhances the experience of domestic students. Since many of Portland State University students find it difficult if not impossible to participate in traditional study abroad experiences, a major focus of collaboration between the Office of International Affairs (OIA) and the academic units has been developing short-term study abroad opportunities. These international experiences, together with connected course work on campus, provide an important opportunity for students who might not otherwise have the ability to study abroad. In addition to the increase in the number of international opportunities for domestic students, international recruiting efforts have increased the number of international students enrolled at both undergraduate and graduate levels. To address the additional
support many of these students need to succeed, OIA has developed international student support and advising functions collaboration with Student Affairs. In addition, exchange programs with universities in China, Vietnam, and South Korea - especially through the Maseeh College of Engineering and Computer Science - provide qualified international students with provisional acceptance into graduate programs upon completing their home institution’s undergraduate program.

**Objectives**
1. Increase efforts to admit and enroll a diverse student body.
2. Provide support services for students from historically under-represented groups.
3. Provide international and intercultural learning opportunities.

**Indicators**
- Number of students engaged in study abroad and percentage of graduating class.
- Admissions and enrollment of diverse students and percentage of total enrollment
- Enrollment by residency.
- Enrollment of international students.
- Program assessment reports that document students’ achievement of the undergraduate internationalization learning outcomes.
- Student services available for under-represented groups.

**Rationale for Objectives and Indicators**

The University is committed to providing educational opportunities to students from a variety of backgrounds. It also has a goal of being internationally recognized for excellence in student learning, innovative research and community engagement. Partnerships with other educational institutions, non-traditional course formats, and international experiences support these goals. As mentioned earlier, the number and type of partnerships are routinely monitored and new efforts to assess their effectiveness are being launched. Data on scholarships are available through the Office of Student Affairs and analysis of their impact on underrepresented students is conducted periodically by the Admissions Office. Reporting of participation in study abroad, international Capstones and other opportunities is collected by Education Abroad, which conducts an annual survey in conjunction with OIRP. The Center for Academic Excellence has established a process to review program assessment materials from undergraduate and graduate programs, which includes assessment of all CWLOs, including internationalization. The newly formed Center for Online Learning receives reports of student participation in online courses from OIRP assesses these online courses. Demographics of faculty, staff and students are reported in the “Fall Term Fact Book,” and the newly formed Office of Diversity and Inclusion receives these and more detailed reports from OIRP.
Table 2. Measurable Indicators for Core Themes

<table>
<thead>
<tr>
<th>Core Theme</th>
<th>Objectives</th>
<th>Quantitative Indicators</th>
<th>Qualitative Indicators</th>
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<tbody>
<tr>
<td>Community Engagement and Civic Leadership</td>
<td>• Engagement and Student Learning • Civic Leadership</td>
<td>• Number of departments reporting CWLO: Engagement (in development)</td>
<td>• UNST Annual assessment report</td>
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<td></td>
<td>• Provide a curriculum that leads to the achievement of the undergraduate</td>
<td>• Student enrollment in community-based learning courses, including Capstone, internships, practica.</td>
<td>• Economic Impact of PSU</td>
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<td></td>
<td>Campus-wide Learning Outcome for engagement</td>
<td></td>
<td>• Partnership with OHSU</td>
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<td></td>
<td>• Increase partnerships that impact student learning and meet community</td>
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<td>• Partnership with PGE</td>
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<td></td>
<td>needs</td>
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<td></td>
<td>• Increase partnerships and activities that contribute to the social and</td>
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<td></td>
<td>economic vitality of the region</td>
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<tr>
<td>Student Success</td>
<td>• Assessment of Student Learning</td>
<td>• Six-year graduation rates for freshman and transfer students</td>
<td>• Reports from Assessment Data Base</td>
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<tr>
<td></td>
<td>• Provide regular, meaningful assessment of student learning</td>
<td>• Six-year graduation rates for co-admitted undergraduate students</td>
<td>• Program Review Process</td>
</tr>
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<td></td>
<td>• Ensure high quality programs through a program review process for</td>
<td>• Annual degrees awarded by level</td>
<td>• Student Success Initiative annual reports</td>
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<td>undergraduate and graduate programs</td>
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<td></td>
<td>• Improve completion rates for freshman and transfer students</td>
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<td></td>
<td>• Improve co-admitted student graduation rates</td>
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<tr>
<td></td>
<td>• Increase degrees awarded</td>
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</tbody>
</table>
### Innovative Research and Scholarship

- Increase sustainability and interdisciplinary research
- Provide opportunities for student participation in research
- Increase research that reflects the University’s urban character and addresses the needs of urban communities

### Educational Opportunity

#### Providing Opportunities

- Comprehensive list of degrees provide a full range of undergraduate and graduate programs to the region that are accessible to a broad range of students
- Partner with other education institutions in the metropolitan area to create a seamless and more effective system to supports opportunities for students from preschool to career

#### Opportunities for Diverse Populations

- Increase efforts to admit and enroll diverse students
- Increase completion rates for diverse student populations
- Provide support services for students from historically under-represented groups
- Provide international and intercultural learning opportunities

## Reporting

### Innovative Research and Scholarship

- Research expenditures overall and ISS research expenditures
- Number of graduate research assistantships
- New database to contain this information - TBD

### Educational Opportunity

- SCH in online, weekend/evening, and high school equivalent courses
- Admission and enrollment of diverse students
- International Student enrollment
- Oregon resident and domestic non-resident enrollment
- Graduation rate and degrees awarded

## Support Services

- ISS annual reports
- Student research
- Inventions
- Ronald E. McNair
- University Honors
- ORSP annual reports

## Additional Resources

- List of undergraduate and graduate programs
- SUCCESS initiative reports
- Educational Pathways
- Office of Global Diversity & Inclusion
- Enrollment Management and Student Affairs webpage
- Office of International Affairs annual reports
Conclusion

In the last 15 months, Portland State University has carried out an extensive process to discuss, evaluate, and reflect upon the relationship between its mission statement and the institution’s Core Themes. This work, begun by a smaller subcommittee, then continued by the larger accreditation advisory committee, and further developed by the Core Theme subgroups and university leadership, has included faculty and administrators from across the academy. As a result of this process, the Core Themes now reflect Portland State University’s distinctive role as an urban-serving, public institution for which community engagement is a core value.

The report clearly describes goals for the future and the measures that will be used to determine success. The indicators create a framework for tracking performance over time. Work will continue on the indicators and on the frequency and nature of data collection. This will entail coordinated efforts across campus in a manner that is broader than for accreditation purposes alone. During a time of change, this document helps to create a common vision centered on President Wiewel’s blueprint for the future.
Introduction

Building on the mission, core themes and expectations from the Year One report, this Year Three report provides the status of the institution with respect to its governance structure and resource capacity. Through its governance structure, the institution has a set of policies that are regularly reviewed and updated to guide the management of the university in fulfilling the institution’s mission. The resources of the institution demonstrate the capacity of the university to meet its core themes as detailed in the Year One Report. Additionally, these institutional resources enable Portland State University to fulfill its mission of access to support programs and services wherever offered and however delivered.

Standard 2.A Governance

2.A.1
The institution demonstrates an effective and widely understood system of governance with clearly defined authority, roles, and responsibilities. Its decision-making structures and processes make provision for the consideration of the views of faculty, staff, administrators, and students on matters in which they have a direct and reasonable interest.

Portland State University is one of seven institutions in the Oregon University System (OUS) and complies with mandates, policies, and procedures established and determined by the Oregon University System. Portland State University has considerable autonomy with respect to its internal authority, roles and responsibilities of its faculty, staff, and administration. Portland State University’s administration is guided by an institutional President, Dr. Wim Wiewel, who relies on a number of qualified faculty, staff and colleagues to enact, implement, and evaluate policies and procedures. The depth and breadth of the executive administration is apparent in the Portland State University organizational chart. A number of institutional committees, including the President’s Executive Committee, provides advice and input into institutional governance. The Provost and Vice President of Academic Affairs directs the institutional curriculum, personnel and leadership development, international affairs, institutional research and planning, and academic budgeting. The Vice President for Finance and Administration is the chief budgetary officer responsible for the financial and operational infrastructure of the institution, the Vice President for Enrollment Management and Student Affairs coordinates the various student services and activities, the Vice President for University Advancement directs the fundraising activities of the institution, alumni engagement and advocates, the Vice President for Research and Strategic Partnerships oversees the administration of university research and helps build regional and international partnerships that promote the economic and cultural development of metropolitan region and the Chief Diversity Officer promotes the university’s diversity initiatives and goals and ensures institutional compliance around issues of equity and diversity. In order to support the institution’s mission and goals, President Wiewel has expanded the Office of General Counsel, created the Office of Global Diversity and Inclusion under the leadership of a Chief Diversity Officer, and created a Chief of Staff position. Portland State University’s seven Schools/Colleges are led by deans, and individual departments are headed by chairs, who are elected through departmental election guidelines. The campus is kept informed of external governance issues through Government Relations Update periodical published by the Government Relations department of the Office of the President and by updates from the President to the campus community.
Portland State University has a long tradition of shared internal governance. The faculty retains significant authority over curricular matters, and are widely consulted on all significant matters pertaining to campus life. They are routinely included in search committees for senior administrative positions and the accreditation process itself, as evidenced by the names appended to this document. The faculty of Portland State University is represented by a faculty governance structure as outlined by the *Constitution of the Portland State University Faculty* and as detailed in the *Faculty Governance Guide*. The Portland State University Faculty Senate consists of elected members from the institutional units and provides the faculty a voice in the decision making process. The Faculty Senate has recently reduced its size from 117 to 56 in order to enhance efficacy and participation. Senators are elected through districts and serve for a term of three years. A number of constitutional and administrative committees report annually to the Faculty Senate; a listing of those reporting bodies is included in the *Faculty Governance Guide* under *Senate and Committee Report Schedule*. The Provost meets regularly with the Faculty Senate leadership. Portland State University also has representation on the Inter-institutional Faculty Senate that consists of faculty members from all seven Oregon University System institutions.

Portland State University students have an active voice through the Associated Students of Portland State University (ASPSU) and through the Oregon State Board of Higher Education, where they give input on matters of tuition and fees, among other things. This structure provides elected students a venue to advocate for student interests, establishes a formal communication network between students, faculty and administration, and enables active participation for students within the university committee structure. Students, upon approval from the Office of the Dean of Student Life, are participants on many Portland State University Faculty Senate Committees, such as Academic Appeals Board, the Budget Committee, Educational Policy Committee, General Student Affairs Committee, Graduate Council, Graduation Program Board, Internationalization Council, Scholastic Standards, Student Conduct Committee, Undergraduate Curriculum Committee, and University Studies Council. ASPSU is also the venue for students to determine allocation of student incidental fees as provided in state law and the rules of the State Board of Higher Education. The President meets with ASPSU members regularly, and consults them on matters pertaining to student life, including tuition.

Portland State Alumni also have opportunities to provide voice on institutional activities through the Advocates. The Advocates, a committee of the Alumni Association, is often sought to provide feedback on issues important to the University. The Advocates recently visited legislators at the capital in Salem to begin the process of lobbying for six major capital projects at Portland State University. Most of the projects are for renovation or deferred maintenance. Those projects directly relate to student and staff safety and will add capacity for increased enrollment. The President meets regularly with alumni members and seeks alumni participation on various campus committees.

A recently formed campus-wide University Policy Committee manages the administrative policy needs of the university, as provided in the University’s Policy on Policies. This representative cross section of Portland State University’s academic and administrative leaders meets once a month to review plans for new policies and revisions to older policies. When a new policy is proposed, the responsible officer fills out an administrative policy plan and presents it to the committee. Based on the plan, and pursuant to the University’s Policy on Policies, the committee determines whether to allow development of the policy to proceed. If the committee authorizes development of the policy, the responsible officer engages university stakeholders in the policy development process outlined in
the administrative policy plan and then prepares a draft of the policy using the Portland State University policy template. The university Executive Committee and the Faculty Senate Steering Committee are informed of any such policy in development and provided the opportunity to participate in the process. After considering input from relevant University stakeholders and revising the draft policy as necessary, the responsible officer presents the draft policy to the committee. The committee may then approve the draft policy as is or return the proposed policy to the responsible officer for further analysis and/or redrafting. After approval of a draft university policy, the committee publicizes the draft policy on the university’s policy library website, provides notice to the University’s unions, and solicits public comment. After the public comment period has passed the university policy committee may approve the new university policy as written, modify the university policy and approve it, return the university policy to the responsible office for further action, or cancel development of the university policy. Upon final approval of the committee and the university’s president, the policy is adopted and published in the university’s policy library maintained by the Office of General Counsel.

2.A.2
In a multi-unit governance system, the division of authority and responsibility between the system and the institution is clearly delineated. System policies, regulations, and procedures concerning the institution are clearly defined and equitably administered.

Recent years have seen landmark legislation affecting Portland State University’s governance structure. Portland State University is a member institution of the Oregon University System (OUS), which as a result of a state law passed in 2011 changed from a state agency to a public university system, affording the public university system a greater degree of autonomy over certain operational details, while ensuring continuation of the system’s public mission and accountability. The Oregon University System Chancellor’s Office carries out the Oregon State Board of Higher Education’s (the Board’s) statewide goals and initiatives for the benefit of the state and its citizens, implements legislatively identified and required fiduciary, compliance, and other duties, Board and Governor’s policies, and all directives related to higher education. The Oregon University System Chancellor is the chief executive and administrative officer and reports directly to the Oregon State Board of Higher Education and as of July 1, 2012 also reports to the state’s newly created Chief Education Officer. The Chancellor supervises a system administration leadership team of Vice Chancellors and Senior Staff who, along with the campus leadership and councils, manages the work of the Oregon University System. The Chancellor is regularly briefed by all Chancellor's Office department directors including the Executive Director of Internal Audit, who also reports to the Board. Under the new legislation, the Board of Higher Education retains responsibility for setting tuition and fees for its seven universities, approves academic programs, and has the responsibility for risk management. Through the adoption of Senate Bill 242, the Board of Higher Education grew from 12 to 15 members in 2012, each appointed by the governor and confirmed by the state Senate.

The Oregon State Board of Higher Education acts as a coordinating and advocacy board for the university system, including leading and making the case for the state subsidy request with the legislature and coordinating its distribution to the member campuses. The board also appoints presidents of its member institutions. The Board also establishes and communicates policies and procedures equitable to the seven institutions through the Chancellor's Office to the institutional presidents.
The Board completed a **long-term strategic plan** in 2007, which defined statewide higher education priorities of the Oregon University System through 2025. On behalf of Oregon University System, the board seeks to accomplish four goals to produce the highest level of educational outcomes for Oregonians:

1. Create in Oregon an educated citizenry to support responsible roles in a democratic society and provide a globally competitive workforce to drive the state’s economy, while ensuring access for all qualified Oregonians to quality postsecondary education.
2. Ensure high-quality student learning leading to subsequent student success.
3. Create original knowledge and advance innovation.
4. Contribute positively to the economic, civic and cultural life of communities in all regions of Oregon.

The board’s strategic plan provides the framework for the mission and priorities for its seven institutions, including Portland State University.

Portland State University’s president works closely with the Oregon University System chancellor and the state board. As Portland State University’s chief executive officer, the president has complete authority of and is accountable for all university matters. The board annually reviews the performance of the president, which includes an examination of the university’s progress towards achieving its goals, its financial health and specific performance indicators. The board also regularly reviews the mission, major academic programs and diplomas for each member institution.

The passage of this legislation in 2011 (Senate Bill 242), also altered the governance structure of Oregon’s university system by creating the **Higher Education Coordinating Commission** to coordinate the activities of postsecondary policy between the Oregon University System and the state’s many community colleges. The Higher Education Coordinating Commission (HECC) is a body of 15 citizens appointed by the governor and confirmed by the Senate. This body assumed responsibility for developing state goals and accountability measures for post-secondary education, and requiring performance compacts between the Oregon University System and the state.

Additional legislation (Senate Bill 909) established the Oregon Education Investment Board (OEIB), which created a unified system of public education from preschool through graduate education (P-20). The OEIB is intended to create a more seamless educational experience, by viewing the P-20 sequence as one holistic, developmental educational experience. Creation of the OEIB was essential to the achievement of another educational innovation, **Senate Bill 253**, also passed in the 2011 session. This legislation codifies the state’s “40/40/20” goals, which are aggressive targets for educational achievement. By 2025, the state will seek to ensure that 40% of all Oregonians acquire a bachelor’s degree or higher, 40% obtain an associate’s degree or post-secondary credential, and all Oregonians earn a high school diploma or its equivalent. Under the mandates of **Senate Bill 1581** (approved by the Legislature in 2012), each public university will enter into an achievement compact with the OEIB that establishes metrics for performance, including student outcomes. The Higher Education Coordinating Commission will act as an advisory board within the OEIB to coordinate higher education policy between Oregon’s public universities and community colleges. The Oregon University System and the OEIB plan to monitor this progress through the use of an **achievement compact**.
A final piece of legislation (House Bill 4061) ultimately may have the most dramatic effect on university governance. HB 4061 establishes a 10-member Special Committee on University Governance which is charged with recommending scope, responsibilities and make-up for institutional governing boards for universities that want such a board and meet certain conditions. Recommendations are due from the committee by August 15, 2012, and will likely result in legislation to be introduced in the 2013 Legislative Session.

The Oregon University System provides updates and information on governance reform and issues to the public through its webpage.

2.A.3
The institution monitors its compliance with the Commission’s Standards for Accreditation, including the impact of collective bargaining agreements, legislative actions, and external mandates.

Portland State University retains an Accreditation Liaison Officer (ALO) who monitors and informs NWCCU on updates that impact the institution’s accreditation standing. The ALO completes NWCCU’s annual report and follows the institution’s progress with programmatic accreditation and requirements. The ALO works closely with the President’s Office, the Office of Academic Affairs,
the Colleges and Schools, and the Office of Institutional Research and Planning to ensure the adherence to policies regarding accreditation.

The Vice Provost for Academic Personnel and Leadership Development, in partnership with Portland State University’s General Counsel and Human Resources, ensures compliance with collective bargaining agreements and resolves disputes that arise regarding these agreements. The faculty is represented by the American Association of University Professors (AAUP) and the American Federation of Teachers (AFT) unions. Portland State University is also served by a classified staff, represented through the Service Employees International Union (SEIU).

The President’s Office, the Office of Government Relations, the Office of Academic Affairs, the Office of Finance and Administration, and the Office of General Counsel work together to ensure appropriate protocols and regulations are in place institution-wide to comply with legislative actions and external mandates that affect Portland State University.

New legislative actions and external mandates are communicated to the campus regularly through the Oregon Board of Higher Education and the Chancellor’s office to the Portland State University President’s Office and other offices as needed.

Office of Financial Aid and Scholarships under the leadership of the Director of Financial Aid ensures the institution is in compliance with U.S. Department of Education requirements on Federal Student Aid and Gainful Employment.

A new Policy Analyst has been retained in the Center for Online Learning to facilitate compliance with states’ requirements on distance learning authorization requirements.

2.A.4 The institution has a functioning governing board* consisting of at least five voting members, a majority of whom have no contractual, employment, or financial interest in the institution. If the institution is governed by a hierarchical structure of multiple boards, the roles, responsibilities, and authority of each board—as they relate to the institution—are clearly defined, widely communicated, and broadly understood.

The policies and practices of the Oregon University System characterize a structure of open and shared governance. The Oregon University System is governed by a 15-member public board of directors, the Oregon State Board of Higher Education. Eleven public members are appointed for four-year terms, and two faculty and two student members are appointed for two-year terms. The faculty and student members rotate among the seven Oregon University System institutions. The board elects a president and vice president, and committees of the board meet regularly. The board’s administrative office manages preparation for all board meetings, serves as the information source on board matters, supports board members and serves as recorder and repository of the board’s official documents and records.

No members of the Oregon State Board of Higher Education have any contractual, employment or financial interests in Portland State University.
2.A.5
The board acts only as a committee of the whole; no member or subcommittee of the board acts on behalf of the board except by formal delegation of authority by the governing board as a whole.

Oregon state statute grants the Oregon State Board of Higher Education authority to make rules and policies for the guidance of Oregon University System employees and for governance of the Oregon University System institutions. Board committees include the Executive Committee, Academic Strategies Committee, Finance and Administration Committee and the Governance and Policy Committee. Formal decisions may be made by the full board or its committees, although the Executive Committee may tentatively approve matters for ratification by the full board.

2.A.6
The board establishes, reviews regularly, revises as necessary, and exercises broad oversight of institutional policies, including those regarding its own organization and operation.

The Oregon State Board of Higher Education establishes system-wide policies, reviews and approves university mission statements, sets institutional operations parameters, approves degree programs, approves budgets, investments and other financial commitments, reviews audits, provides for the management of real property within the Oregon University System and exercises broad-based oversight to ensure compliance with institutional policies. The bylaws of the Oregon University System board delineate the responsibilities, organizational structure and operating procedures of the board, while board policies, administrative rules, and internal management directives define the policies and procedures of the Oregon University System.

The Chancellor’s Office implements policies developed by the board, governor and legislature. This includes development and implementation of policies governing institutional missions, academic programs, enrollment management and admission requirements, tuition, transfer policies, accounting, budgets and other fiscal policies. The chancellor’s office is also responsible for leading the biennial operating and capital budget process, creating partnerships among the Oregon University System campuses, community colleges and K-12 institutions and working closely with the governor, legislature and other constituencies for support and investment in higher education. More information on the system structure is available in the Oregon University System Organizational Chart.

As stated on page 5 of the Year One Report, the Oregon University System closely tracks performance at the seven universities in order to monitor improvement and examine trends that may affect higher education in the state.

State-Level Measures
The Oregon University System State-Level Measures are made up of legislatively-approved indicators linked to statewide “Oregon Benchmarks.” These measures are monitored and reported to the Department of Administrative Services (DAS) and Legislature through an Annual Performance Progress Report.
Board-Level Measures
Board-Level Measures consist of 15 Oregon University System performance indicators, including three institution-specific indicators, tracked and reported by each Oregon University System campus annually to the State Board of Higher Education. Campuses set targets for five common indicators as well as two mission-specific indicators.

Institution-specific measures are selected by the institutions to highlight strategic initiatives, critical features, and distinct missions of each campus.

2.A.7
The board selects and evaluates regularly a chief executive officer who is accountable for the operation of the institution. It delegates authority and responsibility to the CEO to implement and administer board-approved policies related to the operation of the institution.

The Board appoints a chancellor, who acts as chief executive officer of the Oregon University System and is an ex-officio board member. The Chancellor’s powers and duties are provided by statute (ORS 351.085) and include the supervisor of the Presidents of Oregon University System institutions, maintenance of a centralized service program for the Oregon University System institutions, preparing and submitting budgets and funding proposals to the Oregon State Board of Higher Education and employing such personnel as may be necessary. The role of the Chancellor and the relationship between the Chancellor and the institutional presidents is further defined in the State Board of Higher Education’s Policy on Executive Leadership and Management.

As provided in the State Board of Higher Education’s Policy on Executive Leadership and Management, the Chancellor makes recommendations to the Board - in which rests the sole power of decision - concerning the selection, appointment, reappointment, evaluation, salary, and termination of Oregon University System institution presidents. The annual presidential evaluation includes an examination of the institution’s vision, academic program and financial goals, progress toward achieving those goals and specific performance indicators. The board most recently reviewed President Wiewel in August 2012. The board also regularly reviews and approves the mission, major academic programs, degrees, certificates and diplomas of each member institution. Portland State University’s mission statement was approved in a review process completed in January 2011.

2.A.8
The board regularly evaluates its performance to ensure its duties and responsibilities are fulfilled in an effective and efficient manner.

In accordance with its statutory charge, the State Board of Higher Education has developed policies that govern its practices and actions relative to human resources, finances and academic affairs. A set of bylaws govern the Board’s operation, including detailing responsibilities of Board members and its committees. Policies, bylaws, and administrative rules are adopted by the Board at public meetings in accordance with the Oregon public meeting law.

The Board has devoted considerable time to strategic planning, the financial health of the Oregon University System, institutional effectiveness, access and affordability issues and capacity planning. The Board has enhanced its effectiveness by including members who are more geographically and
professionally diverse and who are focused in assisting its member institutions to meet their educational and financial goals. The state board meetings are open to the public, and its agendas and minutes are available online.

Additionally, as a public university system, the State Board of Higher Education is required to assess best management practices with respect to oversight of boards and commissions, based on a legislative budget note during the 2005-2007 legislative session. Performance results from the assessment are reported in Annual Performance Progress Reports (APPR), a requirement of legislative budget requests. The board examines its performance in four broad areas:

1. Executive director selection, expectations and feedback
2. Strategic management and policy development
3. Fiscal oversight
4. Board management and its practices

Through a two-phase process, culminating in a facilitated discussion on October 8, 2010, members of the State Board of Higher Education reached agreement that current practices conform to best practice standards on 15 of 15, or 100 percent, of identified criteria.

2.A.9
The institution has an effective system of leadership, staffed by qualified administrators, with appropriate levels of responsibility and accountability, who are charged with planning, organizing, and managing the institution and assessing its achievements and effectiveness.

The Portland State University administration is organized to support the institution’s mission and the functions of the university. The President’s Executive Committee includes:

- President
- Provost and Vice President for Academic Affairs
- Vice President for Research and Strategic Partnerships
- Vice President for Finance and Administration
- Vice President for Enrollment Management and Student Affairs
- Vice President for University Advancement
- Chief Diversity Officer
- General Counsel
- Chief of Staff

This group directs institutional decision-making while embracing open communication and mission attainment. Other administrative sub-groups provide input to these senior administrators, and administrative rules and policies guide and define management practices. The Executive Committee ensures the clear and consistent communication to their units necessary for institutional advancement.

Leadership of academic colleges is provided by qualified deans and vice provosts who are well versed in academic and administrative matters pertinent to operations of academic units. The seven Portland State University colleges and schools have leadership as listed below. In addition to the
deans, the provost is also served by four vice provosts, the University Librarian, and the director of institutional research:

- College of Liberal Arts and Sciences – Dean
- College of Urban and Public Affairs - Dean
- Graduate School of Education - Dean
- Maseeh College of Computer and Electrical Engineering – Dean
- School of Business Administration – Dean
- School of Fine and Performing Arts - Dean
- School of Social Work – Dean
- University Library – University Librarian
- Office of Institutional Research and Planning – Director
- Vice Provost for Academic Fiscal Strategies and Planning
- Vice Provost for Academic Personnel and Leadership Development
- Vice Provost for Academic Programs and Instruction
- Vice Provost for International Affairs

These administrators are equipped with appropriate levels of responsibility and accountability, and plan, organize, and manage the institution’s goals and mission through regular strategic planning and operational meetings. The president gathers his executive committee weekly in order to properly manage the institution, and consults with a Faculty Advisory Committee in order to stay connected to the academic units and faculty needs. The provost convenes two advisory groups: the Council of Academic Deans, which includes the individuals named above, and the Office of Academic Affairs Executive Committee, comprised of the vice provosts, the Director of Institutional Research, the Associate Vice Provost and Dean of Graduate Studies and the Associate Vice Provost for Undergraduate Student Success and Dean of Undergraduate Students.

The Portland State University organizational chart is available and demonstrates the depth and breadth of the University’s leadership team and how the organizations work together to advance the University’s goals.

2.A.10

The institution employs an appropriately qualified chief executive officer with full-time responsibility to the institution. The chief executive officer may serve as an ex officio member of the governing board, but may not serve as its chair.

The president, as the chief executive officer of Portland State University, is responsible for the overall leadership and direction of the university. The Chancellor and the State Board of Higher Education evaluate the president on an annual basis. The evaluation process includes a self-
evaluation that describes institutional accomplishments and challenges, a progress report on goals from the previous year and identification of new goals for the coming year.

Dr. Wim Wiewel currently serves as the President of Portland State University. Hired in 2008, President Wiewel has an extensive background in higher education leadership. Trained as a sociologist with research interest in the urban university, he came to Portland State University after serving in leadership roles at the University of Illinois Chicago and the University of Baltimore. Dr. Wiewel is highly respected by the state board for his perspectives, insights and collaborative approach to higher education in Oregon. He is a reliable advocate for Portland State University in the region and around the world, and represents the university as Chair of the Coalition of Urban Serving Universities and chair of the Task Force of the American Association of State Colleges and Universities (AASCU), which is preparing a new edition of the influential “Stewards of Place” report. He is also active with the Pacific Northwest Economic Region (PNWER) and hosted the organization’s annual conference in Portland in 2011.

Like all Oregon University System Institutional Executives, President Wiewel serves on the Oregon University System Presidents Council. He attends all of the State Board of Higher Education Governance and Policy Committee meetings because of the discussion of institutional boards and related topics, although he does not have a formal role on that committee. He regularly attends and participates in meetings of the full board, as well as any other meetings when his presence is requested.

2.A.11
The institution employs a sufficient number of qualified administrators who provide effective leadership and management for the institution’s major support and operational functions and work collaboratively across institutional functions and units to foster fulfillment of the institution’s mission and accomplishment of its core theme objectives.

President Wiewel’s core administrative team consists of the Provost and Vice President for Academic Affairs, the Vice President for Finance and Administration, the Vice President for Research and Strategic Partnerships, the Vice President of University Advancement, and the Vice President of Enrollment Management and Student Affairs. Other key members of the senior administrative team include the Chief of Staff, the Chief Diversity Officer, and the General Counsel.

The academic programs are divided among seven academic schools and colleges, each with a dean responsible for all faculty, staff, students and academic programs. Academic colleges are divided into departments or schools administered by a department head, chair, or director responsible for academic programs leading to degrees, certificates, options or minors requiring a specific group of courses for completion.

Two administrative groups - the President’s Executive Committee and the Provost’s Council of Academic Deans- ensure institutional decision making is both timely and effective. These groups and their responsibilities are described above.

The Portland State University Foundation Board and the Alumni Association Board consist of experienced professionals and leading members of the community working to enhance the
development of the institution. These groups are very important in advancing Portland State University’s core themes to the community and to the alumni of the institution. These boards are instrumental in obtaining external support in fostering the institution’s mission and core themes and advocating for Portland State University’s strategic initiatives.

In addition to ensuring timely institutional decision-making processes, these groups encourage and support open communication and ensure project accomplishment. They also set the tone for cooperative working relationships that provide coordination within and among the university’s various organizational units to ensure the mission and core themes of the university are met.

2.A.12
Academic policies—including those related to teaching, service, scholarship, research, and artistic creation—are clearly communicated to students and faculty and to administrators and staff with responsibilities related to these areas.

Portland State University’s academic policies fall under the purview of the Portland State University Faculty Senate and are communicated through the Office of Academic Affairs webpage. Academic policies relating to teaching, service, scholarship, research and artistic creation are documented in the University Guidelines for Promotion and Tenure. These policies are published and made available to the campus community through the OAA website. In addition to these institutional guidelines, academic departments prepare their own, discipline-specific guidelines which are also shared regularly with faculty and staff.

The Vice President for Enrollment Management and Student Affairs and the Dean of Student Life assist and make students aware of academic policies across campus through orientation sessions, through the student government, and through other means of outreach. Information is also available on the Dean of Student Life webpage.

2.A.13
Policies regarding access to and use of library and information resources—regardless of format, location, and delivery method—are documented, published, and enforced.

Policies relating to the use of library and information resources are prominently posted at the Library and Office of Information Technology (OIT) web sites. A specific index of OIT policies is also available publicly. Additionally, policies regarding the library and information technology are listed on the Policies and Policy Making webpage. The monitoring and prevention of loud or unwanted behavior is enforced by library staff on premise or if a situation warrants, by Campus Public Safety. Fines are levied against user accounts if materials are past due and these fines must be paid prior to the subsequent term registration.

2.A.14
The institution develops, publishes widely, and follows an effective and clearly stated transfer-of-credit policy that maintains the integrity of its programs while facilitating efficient mobility of students between institutions in completing their educational programs.
Portland State University’s transfer credit policies are also published in the *Portland State University Bulletin* and Transfer Student Services provides clear details on the various pathways for students transferring to Portland State University. Information includes policies and procedures on those students transferring from 2-year or 4-year institutions, out-of-state institutions, and international institutions. Post-baccalaureate transfer policies are also listed. Additional student services including transfer equivalence, financial aid and scholarships, career center, advising and veteran services are also accessible from the website.

Portland State University prides itself on its relationships to area community colleges. In 2011, the legislature passed [Senate Bill 253](https://www.leg.state.or.us/billsIntroduced/initiated/2011/253), setting a goal to have 100% all Oregonians achieve a high school diploma, 40% achieving an associate’s degree, and another 40% attain the bachelor’s degree. This “40-40-20” plan is the context in which Portland State University seeks continuous improvement for student pathways from community college into the university. In order to improve student success in the transition from community college to university, Portland State University creates articulation agreements and, increasingly, co-admission agreements with area community colleges. In early 2012, for instance, Portland State University reaffirmed and strengthened its long-standing relationship with Portland Community College (PCC) through a new articulation agreement designed to support smooth student transfer pathways from Portland Community College to Portland State University.

Portland State University has recently entered into a reverse transfer agreement with Portland Community College that would allow students who transfer from Portland Community College to Portland State University to “transfer credits back” to Portland Community College to earn their associate degree while working on their baccalaureate degree.

**Students**

2.A.15

Policies and procedures regarding students’ rights and responsibilities—including academic honesty, appeals, grievances, and accommodations for persons with disabilities—are clearly stated, readily available, and administered in a fair and consistent manner.

The Office of the Dean of Student Life and the Office of Global Diversity and Inclusion work with students to ensure awareness of the policies and codes of conduct at the institution. The Code of Student Conduct and Responsibility, the Housing Code of Conduct and Internal Management Directives describe the rights and responsibilities of all students. This information is provided to all students through mandatory New Student Orientation sessions, noted on course syllabi, and listed under resources on many university websites. Academic honesty, appeals, and sanctions are addressed in *Oregon Administrative Rule, Division 031 – Student Conduct Code*. These policies are found on the [Dean of Student Life](https://www.portlandstate.edu/deans/student-life) webpage where the process for submitting complaints, information regarding the Student Conduct Committee, and the appeal process is also provided.

The [Disability Resource Center](https://www.portlandstate.edu/disability) (DRC) coordinates support services and programs in collaboration with and to empower students who have disabilities to enable improved access to educational services. To accomplish this goal, the DRC provides pre-admission and disability counseling, educational training, advocacy and a variety of accommodations for equal access to the educational process and campus life.

Additional resources include the Bias Response Team and the Coordination Assessment Response and Education (C.A.R.E.) teams. The [Office of Global Diversity and Inclusion](https://www.portlandstate.edu/diversity) advocates for a
diverse campus environment by promoting student recruitment and retention efforts for historically underserved populations. The U-Belong campaign is an example of some of the tools used by this office to make the campus more welcoming and inclusive. The office works with internal and external community partners serving historically underrepresented students. The Office of Global Diversity and Inclusion also acts as a neutral body authorized to review and investigate complaints of discrimination and harassment involving students and employees. The Equity and Compliance unit, under the Office of Global Diversity and Inclusion, facilitates and enforces institutional compliance with state and federal equal opportunity laws and regulations. In addition, a comprehensive training module entitled “Creating a Culture of Respect: Preventing Prohibited Discrimination and Unlawful Harassment” for all faculty and staff establishes a common level of understanding and awareness of discrimination and harassment at Portland State University. In partnership with others, the Office of Global Diversity and Inclusion also hosts a variety of speakers, dialogues, and events advancing the cultural competency of the campus population.

2.A.16
The institution adopts and adheres to admission and placement policies that guide the enrollment of students in courses and programs through an evaluation of prerequisite knowledge, skills, and abilities to assure a reasonable probability of student success at a level commensurate with the institution’s expectations. Its policy regarding continuation in and termination from its educational programs—including its appeals process and readmission policy—are clearly defined, widely published, and administered in a fair and timely manner.

The Portland State University Bulletin specifies the admission requirements and placement policies for undergraduate, graduate, transfer, and international students as well as information for students returning to Portland State University after an absence and transfer credit policies in the “Enrollment Services” section. The “Degree Requirements” section includes topics addressing academic credit, the grading system, academic standing, credit by examination, and appeals and grievances. Both Undergraduate Studies and Graduate Studies have dedicated chapters within the Portland State University Bulletin providing more detailed information to students including website addresses. Enrollment services at Portland State University are administered through the Office of Admissions, Registration and Records in a fair and timely manner. The Admissions website also is a valuable resource for students inquiring into the admissions and placement policies, procedures, and required steps for admission to Portland State University.

2.A.17
The institution maintains and publishes policies that clearly state its relationship to co-curricular activities and the roles and responsibilities of students and the institution for those activities, including student publications and other student media, if offered.

The “Student Services” chapter of the Portland State University Bulletin provides information on support services and co-curricular activities available to students. Materials are also readily available on the Enrollment Management and Student Affairs webpage under Campus Life. Portland State University offers a variety of opportunities for students to become involved in university life, both on campus and within the community. More than 100 student programs and organizations provide meaningful, exhilarating, and joyful experiences through:
Student Activities and Leadership Programs (SALP)
Associated Students of Portland State University (ASPSU) - Student Governance
Campus Rec
Viking Athletics

The Dean of Student Life office provides leadership for designated student life services and programs and is a resource for students regarding important campus policies. The Dean of Student Life articulates the roles and responsibilities for these co-curricular organizations and enforces the Code of Student Conduct and expects all students to abide by the code when involved in co-curricular activities.

**Student Publications** at Portland State University comprise six student-operated publications and a graphic design center. The *Portland State University Publications Board Charter* provides guidance on membership, duties and authority, guidelines for publication, review procedures, and expectations for fiscal management. The six publications are the *Vanguard*, a daily general-interest newspaper; the *Rearguard*, a monthly activist newspaper; the *Portland Spectator*, a conservative commentary monthly magazine; the *Portland Review*, a thrice-yearly literary review that publishes fiction, poetry and art; *Pathos Literary Magazine*; and *KPSU*, the campus radio station.

**Human Resources**

2.A.18

The institution maintains and publishes its human resources policies and procedures and regularly reviews them to ensure they are consistent, fair, and equitably applied to its employees and students.

The Office of Human Resources at Portland State University maintains and publishes its policies and procedures on the HR Website under Policies, Contracts and Forms. The Office of Equity and Compliance maintains and publishes its policies and procedures regarding prohibited discrimination. In order to easily locate a specific form, the webpage is divided into six categories: Policies & Contracts, Benefits, Recruit and Hire, Payroll & Employee Information, Position Management, and Performance Management.

In addition, the Associate Vice President for Human Resources serves on the University’s Policy Committee, which meets monthly to review and modify policies, as well as to identify and write new policies as needed. This committee was formed in 2011 to improve policy communication and to ensure the University is consistent and fair in the application of policies with faculty, staff and students.

Portland State University also uses a protected portal network, MyPSU to update employees and students on policy changes. Users access their accounts through a secure login leading to topical tabs that are divided into employee, student, courses, library, and campus themes. Campus announcements, course details, employment details, personal information, employee resources, workshops and other campus information is provided and can be updated by the account user.
2.A.19
Employees are apprised of their conditions of employment, work assignments, rights and responsibilities, and criteria and procedures for evaluation, retention, promotion, and termination.

Employees are apprised of their conditions of employment, work assignments, rights and responsibilities, and criteria and procedures for evaluations, retention, promotion, and termination through the Office of Human Resources website. The HR webpage is the portal to the recruit and hire, job classification/compensation, manager’s corner, talent management, new employees, and separating employees pages.

The Office of Academic Affairs annually updates the Deadlines for Academic Personnel Actions that provides institutional timelines and deadlines for faculty promotion and tenure, annual reviews for tenured faculty, third year reviews for tenured faculty, sabbatical leave requests, departmental chairperson selection, notices of intent not to reappoint for instructional and research faculty, notices of position termination for academic professional staff, and annual review protocol for employees in other academic categories.

2.A.20
The institution ensures the security and appropriate confidentiality of human resources records.

The Office of Human Resources has responsibility for the security and safe-keeping of the employee personnel files, benefits and leaves files, payroll records, and other documents involving employee information. The Office of Information Technology ensures security of the electronic data and that appropriate persons have access to that data. User accounts are monitored to ensure authorized persons have appropriate accessibility to accounts. This custodial responsibility is organized and maintained with adequate staffing and appropriate protocols to ensure the security and appropriate confidentiality of human resources records. Portland State University retains a Personnel Files Assistant, who manages all personnel files and confidential documents stored in a secured file room and archive facility.

**Institutional Integrity**

2.A.21
The institution represents itself clearly, accurately, and consistently through its announcements, statements, and publications. It communicates its academic intentions, programs, and services to students and to the public and demonstrates that its academic programs can be completed in a timely fashion. It regularly reviews its publications to assure integrity in all representations about its mission, programs, and services.

Portland State University adheres to the highest ethical standards in its representation to constituencies and the public, in teaching, scholarship, and service, in treatment of students, faculty, and staff, and relationships with community, regulatory, and accrediting agencies. The institution continually conducts evaluations of its policies, procedures, and publications to ensure appropriate quality. Institutional updates and curricular changes are communicated to the public through the Portland State University website and through the Portland State University Bulletin, which is updated annually.
The University's website, http://www.pdx.edu, hosts more than 250 sites with more than 30,000 pages of content on the institution’s academic programs and admission and graduation requirements. In 2011, the website was redesigned with a cleaner, more consistent look with improved search engine capability and navigation. Portland State University's social media sites include Facebook, Vimeo, Flickr, Foursquare, Wordpress, YouTube, and Twitter, all with growing numbers of followers. Stories and photos about Portland State University's academic programs have appeared in media outlets such as The Oregonian, The New York Times, The Chronicle of Higher Education, Associated Press, Oregon Public Broadcasting and local TV newscasts.

In communicating to the larger community, Portland State University's Office of University Communications focuses its work on three strategic priorities: impact, student success, and excellence. The Office of University Communications closely monitors all of Portland State University's announcements, statements, and publications for clarity, accuracy, and consistency. The institutions’ strategy is to use these three strategic priorities to unify messages, providing consistency, and cohesion. The University's five primary audiences are students and potential students, opinion and business leaders, alumni and donors, faculty and staff, and the public. Portland State University delivers messages across a wide range of mediums, including traditional marketing brochures and materials, earned media, social media, Web-based media, outreach and events. The office also produces the President's annual report card, marketing campaigns, a faculty and staff newsletter, faculty profile, and Portland State Magazine.

2.A.22
The institution advocates, subscribes to, and exemplifies high ethical standards in managing and operating the institution, including its dealings with the public, the Commission, and external organizations, and in the fair and equitable treatment of students, faculty, administrators, staff, and other constituencies. It ensures complaints and grievances are addressed in a fair and timely manner.

The highest ethical standards are expected for all employees and students at Portland State University to ensure the institution remains one of public value, trust, and integrity. OAR 577 Division 141 is dedicated to Faculty Conduct Code. Most of the institution’s administrative policies are consolidated on the Office of Finance and Administration's website. The Professional Standards of Conduct Policy guides expected behavior for all employees. As public employees, all employees of Portland State University are subject to the Oregon Government Ethics Laws, Oregon Revised Statutes Chapter 244, which govern use of public office, gifts conflicts of interest and similar matters.

Student behavior is governed by the OAR 577 Division 31 Student Conduct Code and implemented through the Dean of Student Life's Student Code of Conduct. Portland State University provides students opportunities to petition for changes in their academic record through the Scholastic Standards Committee, the Deadline Appeals Board, and the Academic Appeals Board.

Faculty conduct is regulated by Article 27 of the AAUP Collective Bargaining Agreement, with appropriate due process guidelines. Faculty's right to grieve is protected under OAR 577 Division 42 Faculty Grievance Procedure and is also covered under the AAUP (Appendix B: Contractual Grievance) and the AFT (Article 10. Grievances) Collective Bargaining Agreements. The Office of
Academic Affairs works in collaboration with the Office of Human Resources to facilitate labor management issues.

Complaints that are lodged with the President’s Office and the Office of Academic Affairs are thoroughly investigated and responded to in a timely and appropriate manner. The Office of Equity and Compliance, under the umbrella of the Office of Global Diversity and Inclusion, will conduct a prompt and thorough investigation of any complaints alleging prohibited discrimination and unlawful harassment.

2.A.23
The institution adheres to a clearly defined policy that prohibits conflict of interest on the part of members of the governing board, administration, faculty, and staff. Even when supported by or affiliated with social, political, corporate, or religious organizations, the institution has education as its primary purpose and operates as an academic institution with appropriate autonomy. If it requires its constituencies to conform to specific codes of conduct or seeks to instill specific beliefs or world views, it gives clear prior notice of such codes and/or policies in its publications.

Outside employment and activities including conflict of interest are addressed by OAR 580-021-0025 under Division 21 (Conditions of Service) and OUS Internal Management Directive 4.111 and 4.015. Portland State also has adopted an internal policy regarding Financial Conflict of Interest Disclosure which can be found on the Research Development and Administration webpage. The AAUP Collective Bargaining Agreement addresses external employment opportunities under Article 36 (Outside Employment).

The Portland State University Foundation is an independent tax-exempt organization, which provides accounting services and systems support for the University's fundraising database, which stores donor and alumni information for Portland State University. This separate status of the foundation is one way Portland State University avoids conflict of interest issues with supporters and donors.

2.A.24
The institution maintains clearly defined policies with respect to ownership, copyright, control, compensation, and revenue derived from the creation and production of intellectual property.

To guide students, faculty and staff in the protection of copyrights and compliance with copyright law, a Copyright Policy based on current copyright laws has been adopted. The committee drafting the campus-wide policy included a cross section of the University community including faculty, library staff, IT, Research and Strategic Partnerships, Instructional Design, Distance Learning, the Portland State University Bookstore, and a private copy company. The policy can be found on the University Library's webpage and the policy for File-Sharing and Digital Copyright Enforcement Guidelines can be located on the Office of Information Technology’s webpage. A joint memorandum from the Office of Academic Affairs and the Office of General Counsel reminded all faculty about copyright and coursepack issues. Additionally, the Office of Academic Affairs provides information for all faculty on textbook requirements.
Intellectual Property (IP) rights are governed by OAR, Chapter 580, Division 43, Policies Relating to Inventions, License Agreements, Educational and Professional Materials Development, Patents, and Copyrights and the Oregon State Board of Higher Education’s Internal Management Directives 6.205 through 6.255. This information is readily available on the webpage of PSU’s Office of Innovation & Intellectual Property (IIP). IIP is responsible for administering the Oregon University System’s IP policies, and for managing Portland State University’s intellectual property around innovations that arise from Portland State University research and other activities. Intellectual Property is also addressed in the AAUP Collective Bargaining Agreement under Article 20 (Intellectual Property/Distance Education).

IIP also handles revenue distribution for Portland State University owned Intellectual Property. If a patent or copyright work generates revenue through a license, the revenue is first used to recover Portland State University’s cost of securing the IP and any post-cost patent and copyright revenue is shared with the developers of the IP according to OAR 580-43-0011 and IMD 6.250. The distribution of revenue is slightly different for patents and copyrights.

2.A.25
The institution accurately represents its current accreditation status and avoids speculation on future accreditation actions or status. It uses the terms “Accreditation” and “Candidacy” (and related terms) only when such status is conferred by an accrediting agency recognized by the U.S. Department of Education.

Portland State University informs the public of its accreditation status through the Portland State University Bulletin section on Accreditation, which details the institutional accrediting agency NWCCU and the specialized accrediting agencies that Portland State University adheres for standards of quality. In addition to the submission of the NWCCU annual report, Portland State University submits notification to NWCCU of all off-campus course and program location changes. The Office of Student Financial Aid and Scholarships completes updates to the Federal Student Aid Program Participation Agreement to ensure compliance with the U.S. Department of Education.

The Office of Academic Affairs, the Office of Student Financial Aid and Scholarships, the Center for Online Learning, and the schools and colleges across campus work closely to ensure implementation and adherence to the amendments of the Higher Education Act (HEA) for State Authorization for Online Programs and disclosure of Gainful Employment information on certificates detailing the length of time required to complete a specific program, a breakdown of program cost, and potential career opportunities for program alumni.

2.A.26
If the institution enters into contractual agreements with external entities for products or services performed on its behalf, the scope of work for those products or services—with clearly defined roles and responsibilities—is stipulated in a written and approved agreement that contains provisions to maintain the integrity of the institution. In such cases, the institution ensures the scope of the agreement is consistent with the mission and goals of the institution, adheres to institutional policies and procedures, and complies with the Commission’s Standards for Accreditation.
Portland State University insures the integrity of the institution by adhering to the Business Policies & Procedures established by the Chancellor’s Office.

Internally the contract office has final authority to approve negotiations but does so with advice and consultation where relevant from department chairs, school/college deans, the Office of Academic Affairs, Office of General Counsel, and the Office of Finance and Administration. When agreements are negotiated between international educational agencies, the Office of International Affairs (OIA) is involved into the process and provides advice on federal laws regarding educational visas and health care. OIA ensures that all international agreements involve the relevant department chairs and deans, as well as OAA, in order to ensure protection for student rights, application of sound business practices, and curricular integrity.

**Academic Freedom**

2.A.27
The institution publishes and adheres to policies, approved by its governing board, regarding academic freedom and responsibility that protect its constituencies from inappropriate internal and external influences, pressures, and harassment.

As noted on the Office of Academic Affairs webpage, academic freedom is the intellectual and creative foundation of the University and is protected by the Oregon Administrative Rules (OAR 580-22-005). The faculty and administration of Portland State University jointly accept responsibility for maintaining an atmosphere in which scholars may freely teach, conduct research, publish, and engage in other scholarly activities. This responsibility includes maintaining the freedom to examine controversial issues throughout the University, including classroom discussion when such issues are germane to the subject matter of the course. The University does not attempt to control the personal opinion, or the public expression of that opinion, of any member of the faculty or staff of the institution. Indeed, the faculty and administration of Portland State University feel a responsibility to protect the right of each employee to express his or her opinion. But in the exercise of this freedom of expression, faculty members should manifest appropriate restraint, should show respect for the opinions of others, and should make every effort to indicate that they do not speak for the institution unless they have obtained appropriate approval. The issue of Academic Freedom is also addressed in the Collective Bargaining Agreements of AAUP (Article 12. Academic Freedom and Governance) and AFT (Article 6. Academic Freedom and Responsibility). The University Library supports the American Library Association’s Library Bill of Rights that protects the intellectual freedom of library users.

2.A.28
Within the context of its mission, core themes, and values, the institution defines and actively promotes an environment that supports independent thought in the pursuit and dissemination of knowledge. It affirms the freedom of faculty, staff, administrators, and students to share their scholarship and reasoned conclusions with others. While the institution and individuals within the institution may hold to a particular personal, social, or religious philosophy, its constituencies are intellectually free to examine thought, reason, and perspectives of truth. Moreover, they allow others the freedom to do the same.
As stated in the Year One Report, “Chapter One: Mission, Core Themes, and Expectations” (p. 3-5) and in 2.A.27, Portland State University maintains a campus environment that promotes and encourages intellectual freedom, the exchange of differences of opinion, and access to the pursuit of knowledge to its administration, faculty, staff, students, and the community. Portland State University welcomes and encourages the scholarly and open exchange of ideas between individuals not affiliated with the institution, with the expectation that these exchanges are respectful and do not violate another individual’s rights.

2.A.29
Individuals with teaching responsibilities present scholarship fairly, accurately, and objectively. Derivative scholarship acknowledges the source of intellectual property, and personal views, beliefs, and opinions are identified as such.

All employees of Portland State University are expected to abide by the code of ethics and policies detailed on the Office of Human Resources webpage with particular attention to a specific conflict of interest policy. Oregon Administrative Rule, Division 41- Faculty Conduct Code details the responsibilities of faculty as teacher, scholar, colleague, member of the University, administrator, and as a member of the non-academic community providing the right to academic freedom and stressing the practice of intellectual honesty as a scholar. The Office of Research Integrity within the Office of Research and Strategic Partnerships insures university compliance with state and federal regulations governing research in such areas as Animal Care and Use, Human Subjects, Bio-Safety, and Chemical Hygiene/Laboratory Safety.

2.A.30
The institution has clearly defined policies, approved by its governing board, regarding oversight and management of financial resources—including financial planning, board approval and monitoring of operating and capital budgets, reserves, investments, fundraising, cash management, debt management, and transfers and borrowings between funds.

As a member of the Oregon University System and a public university, Portland State University is governed by Oregon Revised Statutes (ORS), Oregon University System policy, and Oregon Administrative Rules (OAR). All Oregon University System fiscal policies are consolidated in the Oregon University System Fiscal Policy Manual, which includes policies on accounting and financial reporting, auditing, auxiliary enterprises, budgeting, debt financing and management, electronic commerce, fixed assets, fringe benefits and payroll, travel, procurement and contracting, risk management and treasury management.

The university’s division of University Advancement conducts and manages fundraising activities and works closely with the Portland State University Foundation to ensure adherence to IRS regulations, donors’ rights, and gift compliance. The Portland State University Foundation has its own set of policies and procedures regarding acceptance and receipting of private gifts and donations to Portland State University as well as in the management and investments of gift accounts. The relationship between the university and the foundation is established in the Foundation Agreement.
Standard 2.B Human Resources

2.B.1
The institution employs a sufficient number of qualified personnel to maintain its support and operations functions. Criteria, qualifications, and procedures for selection of personnel are clearly and publicly stated. Job descriptions accurately reflect duties, responsibilities, and authority of the position.

Portland State University retains a workforce of more than 6,000 to ensure its daily operations and functions are performed at a satisfactory level. As detailed in the following tables, Instructional and Non-Instructional Faculty, Full-Time Instructional Faculty Highest Degree by Rank and Tenure and Full-Time Instructional Faculty by College/School, the personnel have appropriate qualifications for the institution.

Criteria, qualifications, and procedures for hiring of employees at Portland State University are outlined on the Office of Human Resources webpage. Also detailed on the Human Resources webpage are the various position types and classifications. The Office of Human Resources has a training and development schedule to ensure employees have the appropriate knowledge to complete required tasks.

Portland State University utilizes the PeopleAdmin software program, which is an online position description, requisition and applicant tracking system. The system allows Portland State University to monitor the progress from position creation through hire. PeopleAdmin also serves as the interface for applicants, who can establish a secure account to log on to the system and search for open positions by working title (with position descriptions), classification title, category of positions, department, posting date, and closing date. Candidates are asked to complete the application form for each position and are allowed to upload their resume or letters of recommendation through this software program.

The Office of Human Resources partners with the Office of Global Diversity and Inclusion in its recruitment and retention efforts by co-hosting events that welcome people from diverse backgrounds, improving job descriptions to make them more inclusive of historically underrepresented populations, improving data collecting efforts, and generating mock audits to review compliance efforts.

2.B.2
Administrators and staff are evaluated regularly with regard to performance of work duties and responsibilities.

At Portland State University, administrators and staff are evaluated by their immediate supervisors. Procedures for evaluating all Portland State University employees are detailed on the Office of Human Resources webpage. The review schedule is divided by job classifications including Academic Professionals, Fixed-term Faculty, Tenure Track Faculty, Post Tenured Faculty, Adjunct Faculty, Unclassified/Unrepresented/Excluded Employees, and Student Employees. Employee evaluations are maintained in the Office of Human Resources in dedicated employee personnel files.
The Oregon University System Chancellor conducts the performance evaluation for the Portland State University President and The Office of the President conducts annual evaluations of the institutional Vice Presidents.

The Provost and Vice President for Academic Affairs uses the [Deadlines for Academic Personnel Actions](#) to establish the criteria for review for members of the Council of Academic Deans (CADS), academic deans and vice provosts. The Provost and Vice President for Academic Affairs meets and reviews CADS members on an annual basis but also has implemented a more substantial and rigorous 5 year review, which assesses the individual’s accomplishments, demonstrated competencies to institutional success, improvements and developments, and goal setting. Additional organizational competencies evaluated are to: promote research, foster innovation, create and drive a vision, manage and execute, and lead through influence and trust.

Additionally, other academic administrators and staff follow the established procedures outlined on the Office of Academic Affairs website. The [Annual Performance Review for Academic Administrators](#) provides the process, the self-evaluation form, and the reviewer's summary for administrative evaluations.

**2.B.3**

The institution provides faculty, staff, administrators, and other employees with appropriate opportunities and support for professional growth and development to enhance their effectiveness in fulfilling their roles, duties, and responsibilities.

Portland State University supports its faculty and staff in continuous professional development. The Office of Human Resources has a [Training and Development webpage](#) that lists a number of topics and resources across campus, which are available to employees. The university also offers a variety of educational opportunities in the areas of leadership development, learning the Portland State University computer systems and software, and professional development to its employees.

Faculty are entitled to professional development opportunities as negotiated and included in the [AAUP](#) and [AFT](#) faculty contracts; these typically include professional development funds for research and creative projects as well as travel grants for the presentation of original work at disciplinary conferences. These rights are elaborated in Article 13 of each Collective Bargaining Agreement.

The Office of Academic Affairs website offers a centralized listing of [professional development opportunities](#) for Full-time faculty and Part-time faculty. The website provides a brief description of the criteria, lists award amounts, due dates, and specific contact information for each award or grant. The Office of Academic Affairs also provides support and leadership training led by the Vice Provost for Academic Personnel and Leadership Development for the Assistant and Associate Deans and the Department Chairs and Directors. Each group meets monthly to discuss topics around technical issues, university updates and resources, trends and issues in higher education, and leadership/professional development. In addition, a number of Portland State University department chairs attended a department chair leadership workshop sponsored by the Chancellor’s Office during the summer of 2012.
2.B.4
Consistent with its mission, core themes, programs, services, and characteristics, the institution employs appropriately qualified faculty sufficient in number to achieve its educational objectives, establish and oversee academic policies, and assure the integrity and continuity of its academic programs, wherever offered and however delivered.

As stated in 2.B.1., Portland State has the sufficient number of qualified faculty to achieve its objectives. A complete listing of faculty members, including their beginning of academic service at Portland State University, their highest degree awarded, and the institutions where the degrees were earned are listed in the “Directory” of the Portland State University Bulletin. Faculty qualification and expectations do not vary and are consistent regardless of where the program is offered or how delivered.

In 2007-2008 University Studies initiated a staffing proposal to create twenty-five, tenure-related positions over three years. The initiative was designed to facilitate shared hiring by the University Studies program and academic units by providing full salary support on an indefinite basis for specific faculty hires. In all, 17 positions were appointed as the result of national searches and 8 were created through the conversion of fixed-term positions in University Studies by 2010.

2.B.5
Faculty responsibilities and workloads are commensurate with the institution’s expectations for teaching, service, scholarship, research, and/or artistic creation.

Faculty workloads and responsibilities are articulated in the employee’s offer letter, which is signed by the department chair, the dean, the provost, and the employee. Faculty expectations are aligned with the goals of the department, school/college, and university. Expectations and alignment of personal goals with institutional goals are reviewed during the performance evaluation process.

In 2011, a State Audit Report entitled Oregon University System: Improve Management of Faculty Workload concluded that the Oregon University System and its universities have undertaken noteworthy efforts to improve efficiency; however, none of the universities have comprehensively addressed instructional costs and student demand for courses. The report determined faculty workloads vary across the institutions and one way to improve efficiencies would be to manage the times course are offered more effectively. Portland State University’s, Council of Academic Chairs was mentioned as providing training for department heads to be able to effectively lead their group. The council focuses on the following four areas: daily management (such as budget management, work assignments, and addressing student and faculty issues); university initiatives; identifying national trends and their impact on faculty; and addressing how chairs can be effective leaders.

2.B.6
All faculty are evaluated in a regular, systematic, substantive, and collegial manner at least once within every five-year period of service. The evaluation process specifies the timeline and criteria by which faculty are evaluated; utilizes multiple indices of effectiveness, each of which is directly related to the faculty member’s roles and responsibilities, including evidence of teaching effectiveness for faculty with teaching responsibilities; contains a provision to address concerns that may emerge between regularly
scheduled evaluations; and provides for administrative access to all primary evaluation data. Where areas for improvement are identified, the institution works with the faculty member to develop and implement a plan to address identified areas of concern.

Criteria and processes for faculty evaluation are delineated in the University’s promotion and tenure guidelines entitled Policies and Procedures for the Evaluation of Faculty for Tenure, Promotion, and Merit Increases. Timelines for pre-tenured faculty are outlined in the Deadlines for Academic Personnel Actions. Post-tenure review is regulated by the AAUP Collective Bargaining Agreement in Article 16.

Institutional Career Support/Peer Review. Review of fixed term faculty (.5+) and adjunct faculty are governed by the AFT Collective Bargaining Agreement in Article 7, Rights of Members.

The institution works with faculty members when areas for improvement have been identified during the evaluation process with a supplemental expectations letter. The supplemental letter details how the department chair and the departmental promotion and tenure committee will continually evaluate a person’s progress towards established goals and provide counsel and assistance with the expectation that goals will be met.

**Standard 2.C – Education Resources**

2.C.1 The institution provides programs, wherever offered and however delivered, with appropriate content and rigor that are consistent with its mission; culminate in achievement of clearly identified student learning outcomes; and lead to collegiate-level degrees or certificates with designators consistent with program content in recognized fields of study.

Portland State University offers a variety of programs that evolve from the institution’s mission and location. The institution consists of the College of Liberal Arts and Sciences, the Maseeh College of Engineering and Computer Science, the School of Business Administration, the School of Fine and Performing Arts, the School of Social Work, the Graduate School of Education, the College of Urban and Public Affairs, and the School of Extended Studies. Located in Portland, the variety of programs and the curriculum have deep connections to the city, the metropolitan region, the state and the Pacific Rim. All programs are approved at the departmental, school/college, institutional, and system-wide levels. Programs are reviewed consistently regardless of method of delivery or location. Programs offered off campus or at a new location must submit to Oregon University System a Proposal for Delivery of an Existing Program at a New Location or a Substantive Change Proposal to NWCCU for approval.

The quality and rigor of the review process is outlined on the Office of Academic Affairs webpage under the Curricular Change Instructions. Programs and degrees are required to be reviewed at the department level by the chair and departmental curriculum committee; at the school/college level by the dean’s office and school/college curriculum committee; review by the University Budget Team; analysis at the Office of Academic Affairs by the Vice Provost for Academic Programs and Instruction; the University Library; the Center for Online Learning; Facilities and Planning; the Undergraduate Curriculum Committee or Graduate Council (for graduate programs); the Office of Student Affairs; the program is discussed as an agenda item on a Council of Academic Dean’s meeting; it is presented to the Portland State University Faculty Senate; and upon approval.
presented to the Oregon University System by the Provost, where the program is evaluated by the provosts from the other Oregon University System schools.

Policies regarding the review of certificates and minors are consistent with the process for programs and degrees, but their review is strictly internal to Portland State University and terminates at the Faculty Senate level. Certificate and minor proposals are not reviewed by the Oregon University System.

Portland State University’s programs are continually reviewed through the Academic Program Review process. That process follows one of two routes: specialized accreditation reports serve as program review for those professional schools and programs with specialized accreditation. If the department does not have specialized accreditation (predominantly in the College of Liberal Arts and Sciences), the university program review process is followed. That five-year review cycle allows for self-reflection and dialogue among faculty, the dean, and OAA, and also relies on an external reviewer component.

Assessment
Portland State University centralizes its program-level assessment materials in the Digital Measures Assessment Module, which creates a medium where Undergraduate and Graduate Programs can design program level learning outcomes, create an assessment plan and a curricular map, detail program-level assessment activities, and monitor and evaluate the stages of development for each program. This centralized location allows for annual comparisons of information so evaluations and modification can be instituted on an informed basis. The Center for Academic Excellence, through the Assessment Associate, provides support to departments by providing feedback to departments regarding their assessment plan and results, in order to encourage every department at Portland State University to use its assessment data to improve student learning.

The Institutional Assessment Council (IAC) is broadly charged with overseeing the implementation and evaluation of the assessment process at Portland State University and reporting annually to the faculty through the Portland State University Faculty Senate. Specific annual charges from the Provost detail the exact action for the year. The IAC conducts ongoing evaluations of the undergraduate campus wide learning outcomes and advising the Office of Graduate Studies on the establishment of graduate learning outcomes.

The Student Affairs Assessment Council (SAAC) expands student evaluations to include opportunities they encounter outside the classroom through campus life and co-curricular activities. The SAAC strives to provide students with educational and developmental experiences that increase student satisfaction, persistence, and academic success.

Portland State University’s assessment activities will be elaborated on in the Year 5 Report to NWCCU consisting of Standard 4: Effectiveness and Improvement due fall 2014.

Learning outcomes: Undergraduate
Portland State University has institutionalized eight undergraduate campus-wide learning outcomes (CWLO) that were approved by the Portland State University Faculty Senate in March 2009. These learning outcomes provide Portland State University students an educational experience based on the core values and unique strengths reflected in the themes of the University. The outcomes also communicate the University’s priorities to prospective students, help current students understand
the guiding principles behind their educational experiences, and provide the framework for campus-wide assessment of student learning. Students are aware of and encounter these outcomes across the curriculum in their general education experiences, through intellectual explorations within their majors, and also outside the classroom through the Office of Student Affairs and co-curricular activities. The learning outcomes are:

- Disciplinary and/or Professional Expertise
- Creative and Critical Thinking
- Communication
- Diversity
- Ethics and Social Responsibility
- Internationalization
- Engagement
- Sustainability

The Institutional Assessment Council (IAC), in conjunction and with support from an Assessment Associate in the Center for Academic Excellence and an ACE fellow, initiated two pilot reviews/feasibility studies of the Communication learning outcome. One pilot assessed the Communication learning outcome through a deep analysis of writing assignments in the Division of Political Science. This study analyzed end-of-term writing from two upper division courses. The alternate pilot assessed the writing aspects of the Communication CWLO in upper-level courses across multiple undergraduate departments. The purpose of these two pilot exercises was to develop an instrument that would provide meaningful feedback to faculty about student learning, while simultaneously assessing the institution’s capacity and readiness to apply the pilot to additional learning outcomes. The results of these pilots will be disseminated to the larger community of faculty, staff, and administrators in the IAC’s annual report to the Portland State University Faculty Senate, and the IAC will make recommendations to the Faculty Senate regarding the best course for assessing campus wide learning outcome assessment.

**Learning outcomes: Graduate**

Graduate program learning outcomes are predominantly driven by specialized accreditation standards or governmental regulations but data is also self-reported and differentiated from undergraduate assessment activities in Portland State University’s Assessment Module.

The Proposal for New Course form requires discussion of learning objectives and outcomes. One of the charges of the Institutional Assessment Council for the 2011-12 AY is to inventory the current status of graduate program assessment; develop clear guidelines for what goes into the assessment module from graduate programs; and communicate to graduate program heads what needs to be done.

**Online course and program evaluation**

Portland State University's Center for Online Learning (COL), currently merging with the Center for Academic Excellence, is assuming greater responsibility for institutional assessment and will expand the systematic assessment approach it has developed for online and hybrid courses. In the spring and summer of 2012, COL had piloted and is now implementing a programmatic approach to assessment that includes verification of outcomes by external reviewers whenever appropriate. Five programs contributed in the initial study and five additional programs have committed to participate
for summer and fall 2012. In each case, courses develop a culminating activity and faculty in the program use a common rubric (adapted from the AAC&U VALUE rubrics) to assess the salient learning outcomes. At this point the assessment is not comparative by design. The focus of the outcomes assessment is to help faculty understand what aspects of the course and program are aligning to intent, and which knowledge, concepts, or skills require additional or alternative kinds of attention. In addition, a Quality Matters initiative has been launched, again in context with the advanced design process, to assure the over 1000 online and hybrid courses meet accessibility standards and correspond in design to principles of best practices.

Faculty governance has taken an interest in the quality of online course content, qualification, and rigor. The PSU Faculty Senate has established an ad hoc committee to provide faculty voice on policies and provide feedback to the Center for Online Learning. The Ad Hoc Committee on Online Learning in conjunction with the Center for Online Learning is reviewing course and programmatic content and expectations to ensure consistent quality and content regardless of the format of the course. The committee’s specific charge for 2012 is:

1. Assess the demand for new online offerings for our students.
2. Prioritize requests and proposals for support of new fully and hybrid online courses
3. Develop policies to support departmental choices or plans for level of involvement in online delivery of courses.
4. In collaboration with the Institutional Assessment Council and Center, assist in developing appropriate tools for both face to face and on-line course assessment at PSU

Program Review
Program review processes are key to alignment with institutional mission and core themes, goal setting and continuous improvement efforts across the campus. Until 2010, the university participated in a five-year program review cycle required by the Oregon University System. The Oregon University System Provost Council provided campuses with the option of developing their own program review systems in 2011. Currently, a Portland State University Task Force is developing an institutional program review process for the campus. In the 2012-2013 academic year, one academic unit will pilot the draft process, and provide feedback to the Task Force before implementation is finalized by the campus. For those programs that have specialized accreditation, the assessment and program review components are required for re-accreditation and Portland State University accepts these findings as satisfying institutional program review. For those areas that do not have specialized accreditation obligations (such as most programs in the College of Liberal Arts and Sciences), the campus-level, 5-year program review program under development will be required. The program review process will incorporate faculty, student, administrative and community feedback for a broader range of feedback and perspective.

2.C.2
The institution identifies and publishes expected course, program, and degree learning outcomes. Expected student learning outcomes for courses, wherever offered and however delivered, are provided in written form to enrolled students.

Course, program, and degree expectations are provided and published in a number of readily available venues for students. Course syllabi are required to detail the specific learning outcomes of the class and work obligations for successful completion of the course. The Portland State University
Schedule of Classes is searchable by term, program (including fully online, partially online, and off-campus), word in a course title, or by instructor to assist students in course planning and registration. Brief course descriptions are also provided on the Portland State University Schedule of Classes webpage, on departmental web sites, and through the Portland State University Bulletin to assist students in selecting a desired or appropriate course. The Portland State University Bulletin also outlines the various programs of study at the institution, procedures for master’s and doctoral degrees, and degree requirements. A dedicated chapter of the Portland State University Bulletin is devoted to Graduate Studies where application; admission requirements; tuition, fees, and aid; and degree requirements are provided. School/College websites and chapters devoted to each School/College within the Portland State University Bulletin articulate programs of study and required coursework.

2.C.3
Credit and degrees, wherever offered and however delivered, are based on documented student achievement and awarded in a manner consistent with institutional policies that reflect generally accepted learning outcomes, norms, or equivalencies in higher education.

Faculty members are required to detail course expectations and grading requirements on the course syllabus. If a student contests the awarding of a grade due to a prejudice or capricious evaluation, there is a process through the Academic Appeals Board for a hearing.

Portland State University’s expectations for obtaining a degree are outlined in the Portland State University Bulletin, under the Degree Requirement section. This section details University Requirements; University Studies; Requirements for Bachelor of Arts, Bachelor of Fine Arts, Bachelor of Music, Bachelor of Science Degrees; and Major Requirements. Requirements for a baccalaureate degree are also provided under the Advising webpage. The Graduate Studies section of the Portland State University Bulletin provides information on the degree requirements including oral, written and final examinations.

Undergraduate students whose cumulative Portland State University GPA falls below a 2.0 are placed on Academic Warning or for continued performance are placed on Academic Probation leading to Academic Dismissal. Graduate Students must maintain a Portland State University 3.0 GPA. The expectations are detailed in the Portland State University Bulletin and on the Academic Standings web page. Students must petition the Scholastic Standards Committee for reinstatement and the petition must include a personal statement, an academic plan, and a letter of recommendation from an advisor or instructor.

Portland State University uses the Degree Audit Reporting System (DARS) which aids in tracking student degree progress and in understanding requirements. This report applies completed courses, including transfer courses accepted to Portland State University to the University’s graduation requirements. Upon admission, transfer students receive a generic DARS audit that lists the accepted transfer credits and shows how they apply to the Portland State University general education and degree requirements. Portland State University students may run DARS reports that reflects requirements specific to major, degree, and catalog year and may run multiple DARS audits.

DARS audits are to be used as unofficial advising tools and are not intended to be a promise or guarantee of progress toward a degree, major, minor, or certificate. Certification of completion of
academic requirements is made when students apply for graduation. At that time, a student’s graduation application and DARS audit will be reviewed by the Office of Degree Requirements.

Graduate degree audits are completed by the Office of Graduate Studies (OGS) staff to ensure satisfactory completion of the program of study. Although traditionally the audits have been completed manually, OGS is transitioning to use of the automated degree auditing system (DARS) for Masters Degrees. The transition should be complete by Fall 2012, by which time DARS reports will be available to graduate students and their advisers.

Undergraduate students must apply for a degree or certificate two quarters prior to their expected date of completion. The Application for Undergraduate Degree (or Certificate) is available on the online Registration Forms page or from Degree Requirements in Neuberger Hall. Students are encouraged to meet with their academic adviser prior to submitting the degree application.

Master's, doctoral and graduate certificate program students must apply for a degree one quarter prior to their expected date of graduation. The Application for Awarding of Master's or Doctoral Degree is available on the Graduate Studies Forms page or at the Office of Graduate Studies. Graduate Certificate students must submit the Application for Awarding of Graduate Certificate, which is available online and at the Office of Graduate Studies. Advanced degree and graduate certificate candidates should see their adviser and the Graduate Studies Office concerning graduation requirements and clearance.

2.C.4
Degree programs, wherever offered and however delivered, demonstrate a coherent design with appropriate breadth, depth, sequencing of courses, and synthesis of learning. Admission and graduation requirements are clearly defined and widely published.

The Portland State University curricular approval process demonstrates how the various levels of the institution provide feedback in the structure, difficulty and determination of the courses that are required in the degree program. Upon internal approval by the administration and faculty, the proposal is submitted to the Oregon University System. Approval at the Oregon University System level, affirms that Portland State University’s peers approve of the programmatic academic content and rigor. Portland State University submits notification to NWCCU when new programs are approved by the Oregon University System. External evaluations during program review and accreditation site visits also endorse and provide continual review of the academic quality and accountability of the institution.

The admission and graduation requirements for students at Portland State University are easily accessible to students through the Portland State University webpage and in the Portland State University Bulletin. There are different categories and requirements for admission to Portland State University for undergraduate, transfer, international, and graduate students.

2.C.5
Faculty, through well-defined structures and processes with clearly defined authority and responsibilities, exercise a major role in the design, approval, implementation, and revision of the curriculum, and have an active role in the selection of new faculty. Faculty with teaching responsibilities
take collective responsibility for fostering and assessing student achievement of clearly identified learning outcomes.

At the heart of Portland State University’s curricular processes is the institution’s faculty. Faculty members form the basis of the departmental and school/college curriculum review committees. These committees provide feedback and evaluations on the academic rigor, integrity, the design, approval and implementation of the Portland State University curriculum. Faculty constitutional committees, Scholastic Standards Committee, the Undergraduate Curriculum Committee, and Graduate Council, also provide broad institutional review before the curriculum is voted on by the Portland State University Faculty Senate.

Faculty members also play a key role in the hiring of their colleagues at Portland State University. Departments initiate searches by convening a faculty committee, drafting a proposal to recruit and writing a position description. Faculty members review the position applications and make recommendations for finalist interviews. Faculty members have the ability to review the candidate’s application materials and can provide feedback when candidates visit the institution during the hiring process. Most candidates, as part of the campus visit stage, must give a public presentation to the campus at large which provides another opportunity for broader institutional feedback on the candidate’s topical knowledge and presentation skills. The hiring process at Portland State University involves numerous areas working cooperatively. Department committees must work with the chair, the Dean’s Office, the Office of Human Resources, the Budget Office, the Office of Global Diversity and Inclusion, and the Office of Academic Affairs.

Teaching faculty are responsible for evaluating and grading student work as identified on the course syllabus. Faculty file grades electronically through the Portland State University Information System, a secure website for the Portland State University community. Faculty log into the secure site and access their course through the Faculty Services Tab. A link to “Final Grades” allows faculty to enter their grades and then submit the grades into the PSU information system. Faculty grading deadline is the Tuesday following finals week by 5:00 pm.

2.C.6  
Faculty with teaching responsibilities, in partnership with library and information resources personnel, ensure that the use of library and information resources is integrated into the learning process.

Teaching faculty incorporate activities into their courses that require the use of library and other information resources and that develop students’ abilities to access information, judge its authenticity and use it effectively in the analysis of issues or the support of arguments. Library resources, services and instruction are integrated into departmental courses in a number of ways and at various levels. Broadly speaking librarians provide teaching faculty with instructional support in whatever format or forum is desired, from information for faculty members to use in their classes, to electronic research guides, to librarian-led instruction sessions tailored to student assignments. The librarians work with faculty and peer mentors in University Studies, integrating information literacy and library research skills instruction in the Freshman Inquiry (FRINQ), Sophomore Inquiry (SINQ), and cluster courses. Instruction sessions provided by librarians are at the request of the instructor included in the introductory research-in-the-discipline classes (e.g. PSY 321, ENG 300, HST 300, BA 301, BA 311). The Library was also provided a ULib course prefix to designate
Library courses, such as the ULib 101 Library Research Skills course. Subject librarians support graduate students in various instructional settings: orientations for entering graduate students in specific programs, drop in graduate student workshops, guest lectures in the research methods course in graduate degree programs, consultations for thesis and doctoral literature reviews.

Through the use of online discipline-specific or course-specific research guides, library resources and point-of-need library skills instruction are provided for all areas of the curriculum.

Subject librarians continually work with departmental faculty to assess and enhance the Library collection to ensure that resources to support the curriculum are available.

2.C.7 Credit for prior experiential learning, if granted, is: a) guided by approved policies and procedures; b) awarded only at the undergraduate level to enrolled students; c) limited to a maximum of 25% of the credits needed for a degree; d) awarded only for documented student achievement equivalent to expected learning achievement for courses within the institution’s regular curricular offerings; and e) granted only upon the recommendation of appropriately qualified teaching faculty. Credit granted for prior experiential learning is so identified on students’ transcripts and may not duplicate other credit awarded to the student in fulfillment of degree requirements. The institution makes no assurances regarding the number of credits to be awarded prior to the completion of the institution’s review process.

In 2002, the interim dean of the School of Extended Studies, in conjunction with the then Vice Provost for Curriculum in the Office of Academic Affairs, developed a proposal for credit for prior learning through portfolio review after it was raised in a memorandum by the Oregon University System in September 2001. The proposal was updated in 2005 and the Faculty Senate resolved on February 2005 that “Portland State University should implement Credit for Prior Learning as soon as possible. The Academic Requirements Committee should determine steps necessary for implementation.”

Students who request Credit for Prior Learning must meet with the Vice Provost for Academic Programs and Instruction, the Department Chair, and the Academic Dean of the School or College where the credit is sought. The awarding of credit through portfolio review is only at the undergraduate level and would be Pass/No Pass grade only.

The Vice Provost for Extended Studies hired an outside consultant to provide a cost analysis for implementing Credit for Prior Learning centrally with a dedicated coordinator. The report found that allocating resources for a centralized process was not cost effective.

2.C.8 The final judgment in accepting transfer credit is the responsibility of the receiving institution. Transfer credit is accepted according to procedures which provide adequate safeguards to ensure high academic quality, relevance to the students’ programs, and integrity of the receiving institution’s degrees. In accepting transfer credit, the receiving institution ensures that the credit accepted is appropriate for its programs and comparable in nature, content, academic quality, and level to credit it offers. Where
patterns of student enrollment between institutions are identified, the institution develops articulation agreements between the institutions.

The Portland State University Bulletin details the procedures for undergraduate students returning to the university after an absence and the transfer credit policies of the institution. Transfer credit policies are divided into accredited colleges and universities, unaccredited institution, and foreign colleges and universities. Additional information to students about Portland State University's co-admission programs, associate degree transfers, credits earned at vocational and technical school, the Oregon Transfer Module (OTM), correspondence credit, community and junior college, National Student Exchange Program, college courses completed before high school graduation, and health science professions can also be found in the Portland State University Bulletin.

At the undergraduate level, links to information about transfer policies are found at the Transfer Admission, the Minimum Admission Requirements: Transfer, and the U.Select Course Equivalency System webpages.

The Office of Admissions, Registration and Records (ARR) evaluates credits from accredited colleges and universities. Portland State University accepts college-level credits earned in academic degree programs at colleges and universities accredited by regional accrediting associations and as recommended in Transfer Credit Practices of Designated Educational Institutions. All courses are evaluated to be either equivalent or parallel to Portland State University courses. Equivalent means that the catalog course description is substantially equal to that in the Portland State University Bulletin. Parallel means that the course is in a discipline which is offered by Portland State University, even though Portland State University does not offer the specific course.

In general, courses taken at a regionally accredited institution that are college-level (i.e., not developmental) will transfer. Some limitations do apply, including:

- maximum 12 credits of vocational/technical coursework
- maximum 124 credits from a community/junior college
- maximum 24 credits of English as a Second Language.

If Portland State University offers a similar course at the same level, the course will usually transfer as a direct equivalency (i.e., with a specific course number). If Portland State University does not offer a similar course, or offers it at a different level, the course may transfer as either elective credit from a specific department (LD for lower division; UD for upper division) or as general elective credit.

As part of the admission process, students must submit an official transcript from each college they have attended. Upon admission, students receive a transfer evaluation report listing how transfer courses were accepted and how they apply towards Portland State University's graduation requirements.

At the graduate level, the request to accept transfer credit into a degree program is made via a GO-21 form. The graduate programs review the transfer credit request to make a determination regarding content area. The request is then forwarded to the Office of Graduate Studies, which ensures that the administrative requirements have been met, including: the courses must be at the
graduate level; must be letter graded B- or higher; must not be graded Pass (or similar grading method); must not be used for any other degree at any institution; must be no older than seven years old at the time the master’s degree is awarded; must be applicable to a master’s degree at originating institution without qualification; and must not be correspondence credit. No more than one-third of the degree program can be transfer credits. Transfer credits are only accepted from regionally accredited institutions or international equivalents.

**Undergraduate Programs**

2.C.9

The General Education component of undergraduate programs (if offered) demonstrates an integrated course of study that helps students develop the breadth and depth of intellect to become more effective learners and to prepare them for a productive life of work, citizenship, and personal fulfillment. Baccalaureate degree programs and transfer associate degree programs include a recognizable core of general education that represents an integration of basic knowledge and methodology of the humanities and fine arts, mathematical and natural sciences, and social sciences. Applied undergraduate degree and certificate programs of thirty (30) semester credits or forty-five (45) quarter credits in length contain a recognizable core of related instruction or general education with identified outcomes in the areas of communication, computation, and human relations that align with and support program goals or intended outcomes.

Portland State University has a long-standing commitment to an integrated and engaging general education experience. In 1994 the faculty senate passed the University Studies program, an innovative, interdisciplinary general education program focused around four learning goals: communication, the diversity of the human experience, ethics and social responsibility, and critical thinking.

University Studies (45 credits):

<table>
<thead>
<tr>
<th>Component</th>
<th>Credits</th>
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<tbody>
<tr>
<td>Freshman Inquiry</td>
<td>15</td>
</tr>
<tr>
<td>Sophomore Inquiry</td>
<td>12</td>
</tr>
<tr>
<td>Junior Clusters</td>
<td>12</td>
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<tr>
<td>Senior Capstone</td>
<td>6</td>
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</tbody>
</table>

The University Honors program (45 credits) is an alternative general education program, established in 1969. The focus of the honors program is more explicitly on research methodologies in the social sciences, sciences and humanities with a continued attention to the human experience and the creation of knowledge. Like University Studies, University Honors offers a core of integrated coursework:

<table>
<thead>
<tr>
<th>Component</th>
<th>Credits</th>
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<tbody>
<tr>
<td>Foundations: HON 101, 102, 103</td>
<td>15</td>
</tr>
<tr>
<td>Methods: HON 201, 202, 203</td>
<td>12</td>
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<tr>
<td><strong>Total lower-division Honors credits required</strong></td>
<td><strong>27 credits</strong></td>
</tr>
<tr>
<td>UHP Seminars HON 407</td>
<td>4-12</td>
</tr>
<tr>
<td>Thesis research and project HON 401, 403</td>
<td>6-10</td>
</tr>
<tr>
<td>Course</td>
<td>Credits</td>
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</tr>
<tr>
<td>Internship</td>
<td>0-8</td>
</tr>
<tr>
<td>Departmental Honors Seminars</td>
<td>0-8</td>
</tr>
<tr>
<td>Honors Contracts</td>
<td>0-4</td>
</tr>
<tr>
<td>Honors Colloquia</td>
<td>0-4</td>
</tr>
<tr>
<td><strong>Total upper-division credits required</strong></td>
<td><strong>18</strong></td>
</tr>
</tbody>
</table>

**Assessment of general education**

Assessment has been an integral part of the University Studies program since its inception. All first-year students complete a holistic electronic portfolio which asks them to address their learning in relationship to the four goals of University Studies. During the summer, faculty and graduate students rate these portfolios against rubrics that were created by faculty for each of the goals. Two goals are measured in alternate years. A final report on assessment is created every year and presented to faculty teaching University Studies courses and available each year on the UNST website.

Assessment in University Honors has also taken place but on a lesser scale for the smaller program. Students create portfolios of their writing in the first and second years as well as during their senior year. Honors faculty members assess these portfolios. Beginning in 2011-12, an assessment grant in the University Honors program is focusing specifically on the Honors theses. Faculty from across campus have been invited to help evaluate the honors thesis and to help create a rubric which will be reviewed by the Honors faculty as well as by the Honors Council, a faculty group established by the Faculty Constitution and reporting to the Portland State University Faculty Senate annually.

2.C.10

The institution demonstrates that the General Education components of its baccalaureate degree programs (if offered) and transfer associate degree programs (if offered) have identifiable and assessable learning outcomes that are stated in relation to the institution’s mission and learning outcomes for those programs.

In the spring of 2010, the Faculty Senate passed the campus-wide learning outcomes, which include the University Studies outcomes and expand upon them. University Studies is reviewed by a standing faculty senate committee, the University Studies Council while University Honors is reviewed by a separate senate committee, the Honors Council. Additionally, the Institutional Assessment Council has taken the lead in tracking the new campus-wide learning outcomes across the entire curriculum.

**Campus-wide Learning Outcomes**

Portland State University strives to provide its students an educational experience based on the core values and unique strengths reflected in the following undergraduate learning outcomes. These outcomes communicate the University’s priorities to prospective students, help current students understand the guiding principles behind their educational experiences, and provide a framework for campus-wide assessment of student learning. Through engaging with these outcomes in their broad-based general education experiences, in-depth intellectual explorations within their majors, and the opportunities they encounter outside the classroom through Student Affairs and extra-curricular activities, students will graduate from Portland State University prepared to contribute responsibly to society in the 21st century.
• **Disciplinary and/or Professional Expertise**
  Students will gain mastery at a baccalaureate level in a defined body of knowledge through attainment of their program’s objectives and completion of their major.

• **Creative and Critical Thinking**
  Students will develop the disposition and skills to strategize, gather, organize, create, refine, analyze, and evaluate the credibility of relevant information and ideas.

• **Communication**
  Students will communicate effectively in a range of social, academic, and professional contexts using a variety of means, including written, oral, numeric/quantitative, graphic, and visual modes of communication using appropriate technologies.

• **Diversity**
  Students will recognize and understand the rich and complex ways that group and individual inequalities and interactions impact self and society.

• **Ethics and Social Responsibility**
  Students will develop ethical and social responsibility to others, will understand issues from a variety of cultural perspectives, will collaborate with others to address ethical and social issues in a sustainable manner, and will increase self-awareness.

• **Internationalization**
  Students will understand the richness and challenge of world cultures and the effects of globalization, and will develop the skills and attitudes to function as “global citizens.”

• **Engagement**
  Students will engage in learning that is based on reciprocal and mutually beneficial relationships, and through this engagement will apply theory and skills in diverse venues, linking the conceptual to the practical.

• **Sustainability**
  Students will identify, act on, and evaluate their professional and personal actions with the knowledge and appreciation of interconnections among economic, environmental, and social perspectives in order to create a more sustainable future.

The complete report of the 2010-2011 Institutional Assessment Council is available to the campus.

2.C.11
The related instruction components of applied degree and certificate programs (if offered) have identifiable and assessable learning outcomes that align with and support program goals or intended outcomes. Related instruction components may be embedded within program curricula or taught in blocks of specialized instruction, but each approach must have clearly identified content and be taught or monitored by teaching faculty who are appropriately qualified in those areas.
Portland State University does not offer Associate of Arts (AA) or Associate of Science (AS) degrees. Nor does Portland State University offer an Associate of Applied Science (AAS) degree program. All undergraduate certificate programs are concurrent programs and students cannot enroll at Portland State University solely to complete a certificate program, it must be in conjunction with a baccalaureate program.

All Portland State University certificates are awarded within major programs or degrees and therefore have very clearly articulated learning outcomes. New programs must articulate their learning outcomes, which are subsequently reviewed by the appropriate Faculty Senate committees and ultimately by the Faculty Senate proper. Portland State University complies with the U.S. Department of Education’s requirements pertaining to gainful employment by having each certificate program post the mandated information: length of program, cost of program, employment opportunities, and debt.

**Graduate Programs**

2.C.12 Graduate programs are consistent with the institution’s mission; are in keeping with the expectations of their respective disciplines and professions; and are described through nomenclature that is appropriate to the levels of graduate and professional degrees offered. They differ from undergraduate programs by requiring greater depth of study and increased demands on student intellectual or creative capacities; knowledge of the literature of the field; and ongoing student engagement in research, scholarship, creative expression, and/or appropriate high-level professional practice.

All new program proposals are required to address how the proposed program supports Portland State University’s mission and goals for access, student learning, research, and/or scholarly work, and service, as well as its connection to the institution’s strategic priorities. Through the seven academic schools and colleges, Portland State University offers 18 doctoral programs and over 70 Masters’ programs, as well as nearly four dozen graduate certificate programs.

The Graduate Council (GC) is the body charged with carefully reviewing all curricular proposals at the graduate level. Each proposal is first reviewed by a panel of three GC members and is then brought to the full GC for their review. For course proposals, special attention is paid to the need to differentiate between undergraduate and graduate course requirements for 400/500-level courses, how thoughtfully the question regarding library resources has been addressed, credentials of proposed instructors, and possible overlap with courses in other departments. As per the Oregon University System Academic Program Approval Process: New Graduate Programs, all proposed new programs must demonstrate adequacy of resources to deliver a quality program. They must also address outcomes and quality assessment.

For existing programs, Portland State University is transitioning from the Oregon University System program review to an institutional program review.

The majority of graduate students at Portland State University are enrolled in programs with specialized accreditation.
2.C.13
Graduate admission and retention policies ensure that student qualifications and expectations are compatible with the institution’s mission and the program’s requirements. Transfer of credit is evaluated according to clearly defined policies by faculty with a major commitment to graduate education or by a representative body of faculty responsible for the degree program at the receiving institution.

At Portland State University, all admissions are handled centrally through the Office of Admission, Registration and Records. Graduate students are recommended for admission by the academic program to which they seek admission based on said program’s own high standards. The Office of Graduate Studies (OGS) makes determinations regarding department requests to admit students not meeting minimum university requirements (i.e., minimum GPA, TOEFL), by means of a GO-20 form (as students are not allowed to handle this form, it is not available electronically). The university has recognized the need to move to a centrally administered one-step on-line application process for graduate programs. Possible vendors for this process have been identified.

Graduate degree audits are completed by OGS staff to ensure satisfactory completion of the program of study. As noted in 2.C.4 above, OGS is transitioning to an automated degree audit system, which is expected to be complete by the end of the 2012-13 academic year.

As noted in 2.C.8 above, at the graduate level, the request to accept transfer credit into a degree program is made via a GO-21 form. The graduate programs review the transfer credit request to make a determination regarding content area. The request is then forwarded to the Office of Graduate Studies, which ensures that the administrative requirements have been met, which are: the courses must be at the graduate level; must be letter graded B- or higher; must not be graded Pass (or similar grading method); must not be used for any other degree at any institution; must be no older than seven years old at the time the master’s degree is awarded; must be applicable to a master’s degree at originating institution without qualification; and must not be correspondence credit.

Retention policies include academic standing (monitored by OGS) and satisfactory progress towards degree (oversight by individual programs)

2.C.14
Graduate credit may be granted for internships, field experiences, and clinical practices that are an integral part of the graduate degree program. Credit toward graduate degrees may not be granted for experiential learning that occurred prior to matriculation into the graduate degree program. Unless the institution structures the graduate learning experience, monitors that learning, and assesses learning achievements, graduate credit is not granted for learning experiences external to the students’ formal graduate programs.

Many of the professional graduate degree programs at Portland State University require internships and field experiences for work done as part of the degree program of study. These are overseen by the faculty of the specific degree programs. In some programs, students receive credit for
internships and/or field experience (i.e., student teaching, clinical experience), which are required for licensure in their respective fields, but these credits are not applied towards the degree.

Portland State University does not grant graduate level credit for experiential learning that occurred prior to matriculation into the graduate degree program. Graduate credit is not given for learning experiences external to a student’s formal graduate program.

2.C.15
Graduate programs intended to prepare students for research, professional practice, scholarship, or artistic creation are characterized by a high level of expertise, originality, and critical analysis. Programs intended to prepare students for artistic creation are directed toward developing personal expressions of original concepts, interpretations, imagination, thoughts, or feelings. Graduate programs intended to prepare students for research or scholarship are directed toward advancing the frontiers of knowledge by constructing and/or revising theories and creating or applying knowledge. Graduate programs intended to prepare students for professional practice are directed toward developing high levels of knowledge and performance skills directly related to effective practice within the profession.

Portland State University has 18 doctoral programs and more than 70 Masters’ programs as well as nearly four dozen graduate certificate programs. The graduate programs at Portland State University are approved by the State Board of Higher Education and accredited through specialized agencies and through NWCCU. The faculty members in these programs have primary responsibility for assuring the high level of expertise, originality and critical analysis of the graduate students completing degrees in their respective programs. The graduate programs are designed and approved to prepare students to succeed and excel in their areas of study through research, the application of knowledge, scholarship, and skill development.

Continuing Education and Non-Credit Programs

2.C.16
Credit and non-credit continuing education programs and other special programs are compatible with the institution’s mission and goals.

All continuing education programs, credit and noncredit, go through a formal review process that ensures the course/program is in alignment with the University and department’s mission and goals and all programs are reviewed on a regular basis.

Credit Programs

All credit programs are reviewed and approved by an academic department which awards credit for the program. Many, if not most of the programs, are developed collaboratively between the department and the continuing education unit. One of the primary review criteria is that the program meets the mission of the University and aligns with University and departmental goals. There is a formal process for approval for undergraduate majors and minors, degree programs, licensure programs, and graduate certificates. If the continuing education unit offers a parallel program as an in-load program, that review has already taken place, and the continuing education unit continues to ensure that the program matches the university’s mission. If continuing education offers a unique program, it will work with the appropriate department(s) to go through the institutional approval process (e.g., departmental curriculum committee, department approval,
school or college curriculum committee, school or college faculty, Curriculum Committee and/or Graduate Council, Faculty Senate, and Provosts’ Council).

**Non-Credit Programs**
All non-credit program proposals go through a college/department-specific review process which utilizes critical demographic and economic data to ensure programs align with the University’s mission and goals, and fill an identified need within the community. The process includes an environmental scan and market research of the target audience to ensure adequate demand. Input is solicited from advisory groups, academic departments, and local stakeholders.

**2.C.17**
The institution maintains direct and sole responsibility for the academic quality of all aspects of its continuing education and special learning programs and courses. Continuing education and/or special learning activities, programs, or courses offered for academic credit are approved by the appropriate institutional body, monitored through established procedures with clearly defined roles and responsibilities, and assessed with regard to student achievement. Faculty representing the disciplines and fields of work are appropriately involved in the planning and evaluation of the institution’s continuing education and special learning activities.

**Academic Quality**
All new continuing education courses and programs are developed jointly with an academic department, involving fixed-term and tenure-track faculty and are approved through the institutional curricular process. In addition, experts from the community are often involved in an advisory committee that provides input into the curriculum. All courses and programs must meet University learning objectives, departmental learning goals, and appropriate state and national standards. All of the courses and/or programs developed include an assessment of student learning component within the context of the assessment plan for the specific area where the courses are offered.

One example of active faculty involvement is demonstrated by the example provided by the Graduate School of Education. Every endorsement, licensure, and degree program offered through continuing education has a faculty liaison, who provides curricular oversight, academic counsel, student advising, and assures compliance with the existing assessment plan for the program. Continuing education programs must also comply with specialized accreditation review (i.e., TSPC, NCATE, CORE, CCREP, NWCCU) as any credit program in the Graduate School of Education. Courses and programs are only developed and offered if the department and/or the continuing education unit have identified a need for the courses/programs.

**Approval and Monitoring**
All continuing education credit offerings, regardless of their delivery format, must follow institutional curricular protocol for approval and must be offered through an academic department on campus. Each school/college and/or department has its own specific internal approval process, and the unit offering the continuing education courses follows that process. The standard procedure follows this design:

- The departmental curriculum committee,
- The department as a whole/Chair signature,
Courses, regardless of delivery format, that are offered multiple times as an omnibus course must go through the new course proposal process to obtain a discrete number in an academic unit. This process is consistent campus-wide when all omnibus course offerings are transitioned to discreet course numbers.

Consistent with institutional policy, all new programs, regardless of delivery mode, are identified, developed, and implemented collaboratively by the appropriate academic unit(s) and the continuing education unit(s). They are reviewed by the Provost. If they appear to be academically and financially viable, the approval process is:

- The departmental curriculum committee,
- The department as a whole/Chair signature,
- The school or college/Dean's signature,
- The Undergraduate Curriculum Committee and/or Graduate Council,
- The Faculty Senate Budget Committee,
- The Faculty Senate,
- The Provost, and
- The Oregon University System Provosts’ Council
- The State Board of Higher Education
- The Northwest Commission on Colleges and Universities

All continuing education credit offerings undergo the same departmental, programmatic, and accreditation review as all courses and programs at Portland State University.

**Student Achievement**

All programs, regardless of delivery mode, in-load offering, or offered through continuing education, assess student learning through the same process. If the continuing education program is a parallel program, simply offered through a different delivery format or in a different location, it undertakes and/or is included in the same plan for assessment of student learning as the on-campus program in collaboration with the sponsoring department. Department chairs and faculty review the results and work with continuing education to make changes to the program based on student learning. If the continuing education program is unique (the only program offered on campus), it develops a plan for assessment of student learning in conjunction with the department(s) awarding credit for the course work and implements the plan. The department chair reviews the results and works in conjunction with continuing education administrators to make appropriate changes to the program based on student learning.

At the course level, department chairs, who have approved the faculty teaching continuing education courses, review the class evaluations for the courses in their department. If there is an issue with the faculty member teaching the course (e.g., unclear expectations, not responding to students), the chair will raise the issues with the faculty member or take further steps as needed. Faculty teaching in
continuing education courses adhere to campus policies, guidelines, and timelines for performance evaluations.

2.C.18
The granting of credit for Continuing Education Units (CEUs) for continuing education courses and special learning activities is: a) guided by generally accepted norms; b) based on institutional mission and policy; c) consistent across the institution, wherever offered and however delivered; d) appropriate to the objectives of the course; and e) determined by student achievement of identified learning outcomes.

Portland State University’s noncredit programs maintain and administer policies for the granting of CEUs that comply with the International Association of Continuing Education and Training (IACET) guidelines and criteria. Noncredit offerings are reviewed for alignment with the institutional mission, and their content and instruction is approved by the appropriate academic department before they are offered by a continuing education unit. Programs are often developed in collaboration with academic units.

As Portland State University integrates a new noncredit software system, Destiny One – The Lifetime Learning Platform, there will be greater consistency and institutional control across all units offering noncredit classes. Destiny One works with other educational management systems such as SunGard Banner, Datatel and PeopleSoft, to streamline enrollment, curriculum, finance and marketing. In providing security to students, Destiny One supports the highest software security standards and has the highest certification for payment application and cardholder information.

CEUs will be commonly defined, and there will be a repository for transcripts. There will be common training for use of Destiny One and, possibly, common/similar templates for certificates and transcripts. The curriculum and learning objectives for noncredit offerings are based on meeting professional standards/competencies and practitioners’ needs. CEUs are only awarded at the completion of the noncredit offering.

2.C.19
The institution maintains records which describe the number of courses and nature of learning provided through non-credit instruction.

The School of Extended Studies (SES) maintains a comprehensive database for the majority of Portland State University’s noncredit courses, which includes information on enrollment, content, instructor, logistics, and fees. This information is provided yearly to the Northwest Commission by PSU in its annual report to NWCCU.

In December 2011, Portland State University migrated information and data from its previous system, Peopleware, (which had provided certificates for noncredit offerings and had been the repository for transcripts) to a new software system, Destiny One. Destiny One provides more detailed information and better suits the needs of the university by documenting course descriptions, instructors, logistics, fees, and attendance information. All of the SES and CE/ED noncredit offerings were included in the migration and the plan is to integrate all future Portland State University noncredit offerings from other areas of campus (e.g., School of Social Work, College of
Urban and Public Affairs) into this new software system. Destiny One was selected through an extensive RFP process led by an external consultant with a number of Portland State University personnel involved in the evaluation of the program.

**Standard 2.D – Student Support Resources**

2.D.1 Consistent with the nature of its educational programs and methods of delivery, the institution creates effective learning environments with appropriate programs and services to support student learning needs.

Student and campus services are published in the *Portland State University Bulletin* with web addresses, telephone numbers, and email addresses. The division of Enrollment Management and Student Affairs is led by the Vice President for Enrollment Management and Student Affairs, with highly qualified staff of administrators. Enrollment Management and Student Affairs is a student-centered organization, dedicated to the advancement of student success and student learning at Portland State University. Enrollment Management and Student Affairs seeks to enhance students' experiences by establishing a vital co-curricular program and providing support services that help students attain their personal, academic, and professional goals.

The Office of Enrollment Management and Student Affairs supports students throughout the continuum of their educational experience. Beginning with admission, orientation, and enrollment at the institution; continuing with support services and learning opportunities that enhance academic progress and personal growth; and culminating with the search for employment upon graduation; the division facilitates a student's journey through the university and beyond. Throughout the student experience, Portland State is committed to enhancing academic and career success, encouraging engagement within the University learning community and the community at large, supporting the development of diverse and global perspectives, and promoting healthy living practices.

Enrollment Management and Student Affairs divisions provide essential services and programs to enhance student enrollment, retention, graduation and learning outside-of-classroom. Enrollment Management and Student Affairs is organized into seven areas of aligned services and programs including:

- Enrollment Management
- Advising & Career Services
- Student Life
- Student Health and Counseling Services
- Diversity and Multicultural Student Services
- Campus Recreation
- Residence Life

Within these seven alignments, there are more than 30 unique departments, centers and programs designed to support student needs. Departments and program areas are:
Enrollment Management and Student Affairs at Portland State University facilitates and enhances student learning and success through intentionally connecting parts of the student experience into a whole education. Its goals are to enrich and complement student learning by providing opportunities for involvement in meaningful activities within the University community and the larger urban community. Finally, it provides services that facilitate a student's transition to the University and remove barriers to student success.

Research has consistently shown that student learning, motivation, sense of belonging, retention and success is enhanced in Learning Communities. Portland State’s University Studies Program promotes learning communities at all four levels of the program. Faculty, students, mentors, and community partners form intentional learning communities where they actively collaborate, engage
rigorous curricula and develop sustaining relationships that support lifelong learning and development. The optional First Year Experience (FYE) program is designed to make the first year at the university easier for new students by building a support network of peers and providing a nurturing environment with all the necessary resources to support their academic career. The FYE-only classes have a unique programming design that enhances educational classroom experience through both educational and social programs within the residence halls. This arrangement reinforces what students are learning inside the classroom and provides first year students with the opportunity to meet other students who share similar interests, classes, and social activities.

The Learning Center, located in the University Library, provides a number of supportive instructional and tutorial services for students including peer tutoring, academic coaching, workshops, and supplemental instruction in an effort to help students succeed at Portland State University. Not only does the Learning Center provide support for those striving to be more academically successful, but it also creates the opportunity for those effective students to become involved in the intellectual growth and social development of their peers. Additional tutoring services in Chemistry, Business, Engineering, Math and Statistics, and Writing are also listed on the Learning Center webpage. Additional learning spaces include areas within the library, at computer labs, and designated study locations within Smith Memorial Student Union.

2.D.2
The institution makes adequate provision for the safety and security of its students and their property at all locations where it offers programs and services. Crime statistics, campus security policies, and other disclosures required under federal and state regulations are made available in accordance with those regulations.

The Portland State University Campus Public Safety Office, in partnership with the campus community, and within the framework of the university’s mission, is dedicated to creating and promoting a safe, secure and peaceful environment by effectively applying policies and laws, delivering emergency services, performing requests for assistance and providing on-going public safety education. The Campus Public Safety officers have complete Law Enforcement authority to arrest individuals involved in illegal acts on-campus. If minor offenses involving University rules and regulations are committed by a University student, in violation of the Student Code of Conduct, the Campus Public Safety Office may also refer the individual to the disciplinary division of the Office of Enrollment Management and Student Affairs.

Major offenses such as aggravated assault, robbery, and auto theft that occur on campus are also reported to the Portland Police Bureau so that joint investigative efforts with the Campus Public Safety Office and the Portland Police Bureau are deployed to solve these serious felony crimes. The prosecution of all criminal offenses, both felony and misdemeanor, are undertaken by either the Multnomah County District Attorney’s Office or the Portland United States Attorney’s Office. The Campus Public Safety personnel work closely with local, state, and federal police agencies and have direct radio communication with local responders. Likewise, the Campus Public Safety Office is also a part of the Multnomah County 911 Emergency System.

In the event that a situation arises, either on or off-campus, that, in the judgment of the Director of the Campus Public Safety Office of Portland State University, constitutes an ongoing or continuing threat, a campus wide “timely warning” will be issued. Depending on the particular circumstances of
the crime or emergency, especially in all situations that could pose an immediate threat to the community and individuals, the Campus Public Safety Office may notify the campus community through a variety of means:

1. Portland State University Campus Announcement System via myPSU Portal under the “Daily Messages” channel.
2. Printed Notices, when appropriate may be posted at campus locations affected by the emergency.
3. Portland State University -Alert emergency information will broadcast information via text, email and/or voice messages to the campus community.
4. Crime Alerts that remain an issue of on-going concern to the campus community are posted on the Campus Public Safety Office web site, [http://www.pdx.edu/cpso/crime-alert](http://www.pdx.edu/cpso/crime-alert)
5. Local Media may also be provided information when the risk of harm in a particular incident can reasonably be expected to extend to off-campus areas.

In March 2012, the State Board of Higher Education approved a new policy on firearms for the Oregon University System, including Portland State University. The new policy took effect immediately to enhance safety at all Oregon University System institutions. It forbids students, employees, individuals with a business interest with the campus (such as vendors and contractors), event attendees, those who rent or lease University property, and campus visitors from carrying a firearm on University owned or controlled property. Such property includes all Portland State University campus buildings, sports or performance venues, and workplaces. The prohibition is in effect whether or not an individual holds a concealed handgun license. The policy provides several exceptions to the firearms prohibition, including for on-duty law enforcement officers and public safety personnel and military program participants.

Individuals found in violation of the policy may face disciplinary action through means specific to their relationship with the University. Students will be held accountable under the student conduct code, and employees under Portland State University’s employment policies and collective bargaining agreements. Contractors, vendors, event attendees, those who rent or lease University property, and other visitors to Portland State University will be subject to exclusion from campus.

The Campus Public Safety Office is also the main campus resource for lost and found items and has negotiated through a third party vendor, [Front Door Software](http://www.pdx.edu/cpso/crime-alert), for laptop tracking in case of theft. Statistics and reports required under the [Cleary Act](http://www.pdx.edu/cpso/crime-alert) are reported by the Campus Public Safety Office in accordance with the U.S. Department of Higher Education. Additional information including contact telephone numbers and hours of operation are also provided in the *Portland State University Bulletin*.

**2.D.3**

Consistent with its mission, core themes, and characteristics, the institution recruits and admits students with the potential to benefit from its educational offerings. It orients students to ensure they understand the requirements related to their programs of study and receive timely, useful, and accurate information and advising about relevant academic requirements, including graduation and transfer policies.
The Office of Admissions, Registration, and Records oversees the admissions process at Portland State University. Admission criteria are provided in the Portland State University Bulletin and on the Portland State University website. Admissions are divided into undergraduate, international, and graduate categories of students for ease of identification. Included in the undergraduate admissions process are steps for freshman, transfer, co-admission, post-baccalaureate, non-degree, and re-enrollment students. In order to increase educational opportunities and student success for the area’s population, Portland State University has co-admission agreements with other regional schools such as:

- Chemeketa Community College
- Clackamas Community College
- Clark College
- Clatsop Community College
- Mt. Hood Community College
- Portland Community College

Some of the benefits of co-admission, admission deadlines and the process for applying to co-admission are available at a dedicated co-admission web page.

International student admissions are distinguished from resident and out-of-state admissions. International students are required to demonstrate English proficiency. This requirement assists in ensuring international students are appropriately prepared for the rigors of their educational experience at Portland State University. Students, who do not meet University language proficiency at the undergraduate level, must begin their studies with an intensive English curriculum. International students are accepted at the undergraduate level (freshman and transfer), at the post-baccalaureate, and at the graduate level. An International Admissions brochure also provides international students additional information on the admissions process but also contains information on academic programs, international scholarships, and housing opportunities. Students seeking admission to a graduate program must meet both university and departmental requirements. Applicants are also required to submit an application to the university and to the academic major department, which may require letters of recommendation, test scores, an essay or personal statement, and a resume. Information for students seeking graduate admission as a post-baccalaureate or non-degree entry is located on the graduate admissions webpage. For those students, who have left their graduate program at Portland State University, and are seeking a return to finish their degree are encouraged to meet with the Office of Graduate Studies.

New Student Orientation programs are required for all new undergraduate students including first-year students, transfer, co-admits, and international students prior to registration. Graduate, non-degree and post-baccalaureate students are directed to their home departments for advising. Advising at orientation, intentional advising later in a student’s academic career, and degree maps are just some of the efforts to improve retention, persistence, and student success at Portland State University.

Portland State University has also implemented Degree maps which take into account all of the components required to earn a Bachelor’s Degree at Portland State University. These maps also identify degree progress milestones, pre-requisites and course sequences that are critical to staying
The Fall Retention Project was originally designed to improve the persistence of freshman students from fall to winter registration at Portland State University, but because of its initial success the project has expanded into a year-long one and incorporated financial awards to assist students in completing their academic plans. This encompassing project is designed for academic advisors to intervene with students at critical junctions in their educational experience at Portland State University and offer financial awards as needed once academic plans have been created to improve student retention at the institution.

The Learning Center provides a number of supportive instructional and tutorial services for students including peer tutoring, academic coaching, workshops, and supplemental instruction in an effort to help students succeed at Portland State University. Not only does the Learning Center provide support for those striving to be more academically successful, but it also creates the opportunity for those effective students to become involved in the intellectual growth and social development of their peers. Additional tutoring services in Chemistry, Business, Engineering, and Math and Statistics are also listed on the Learning Center webpage. The Writing Center is also available to students, faculty, and staff to assist with writing projects such as class assignments, resumes, publications, and creative writing works.

The Portland State University Bulletin provides information on Advising and Career Resources, the Learning Center, and is updated annually regarding relevant academic requirements, including graduation and transfer policies.

2.D.4
In the event of program elimination or significant change in requirements, the institution makes appropriate arrangements to ensure that students enrolled in the program have an opportunity to complete their program in a timely manner with a minimum of disruption.

The Portland State University Bulletin lists degree and graduation requirements and is updated annually to reflect any changes and to ensure accurate information is provided to students. Degree requirements are also listed on the Graduation Requirements website. Any significant changes are made to both information locations as well as the department’s webpage. Portland State University also has a seven year “Catalog Rule” in place, where the requirements in any PSU Bulletin are valid for seven years. Students may select the requirements in any Portland State University Bulletin going back to the first year you attended any accredited higher education institution in the U.S., as long as they graduate within seven years of the year selected. When selecting a Portland State University Bulletin year, students are required to satisfy both the University requirements and the major requirements for that year.

The process for the elimination and/or alteration of an academic unit is clearly articulated to the campus with both a proposal form and visually through a process map. The process is inclusive incorporating the perspectives of faculty, administration, the Educational Policy Committee, the Budget Committee, the Portland State University Faculty Senate, the Council of Academic Deans, and the Provost. When an existing program is either eliminated or undergoes significant curricular changes in the graduation requirements, students still have the capacity to graduate under the original requirements or to switch to the newer requirements. Students are notified by the
department offering the recently eliminated or altered degree program and instructed to meet with their academic adviser. If students select to graduate under the original requirements, there are multiple methods to meet these requirements. A student can graduate under the original requirements when the unit continues to offer some of the original curriculum that is expected to be eliminated or the student can substitute other offered courses which are deemed equal to eliminated courses. Students who wish to petition General Education requirements must process this request through the Academic Requirements Committee while intradepartmental requirements are handled internally by the academic unit.

Portland State University has not eliminated any programs since 1998 but programs that undergo any significant curricular changes are required to ensure every reasonable accommodation is provided to the student. An example of this is the Oregon Masters of Software Engineering Program, where a significant curricular revision occurred. Enrollment for new students was paused until the curricular changes could be approved. Students currently enrolled in the program received notification about the curriculum change and were also provided a ‘teach out’ map listing the courses required and when offered over the next two years for program completion. Students were also notified that if they missed a course they could petition the department for a substitute course to satisfy that specific requirement.

2.D.5
The institution publishes in a catalog, or provides in a manner reasonably available to students and other stakeholders, current and accurate information that includes:

a) Institutional mission and core themes;
b) Entrance requirements and procedures;
c) Grading policy;
d) Information on academic programs and courses, including degree and program completion requirements, expected learning outcomes, required course sequences, and projected timelines to completion based on normal student progress and the frequency of course offerings;
e) Names, titles, degrees held, and conferring institutions for administrators and full-time faculty;
f) Rules, regulations for conduct, rights, and responsibilities;
g) Tuition, fees, and other program costs;
h) Refund policies and procedures for students who withdraw from enrollment;
i) Opportunities and requirements for financial aid; and
j) Academic calendar.

The catalog Portland State University produces is entitled the Portland State University Bulletin and is readily available for view or download to the public through the Portland State University webpage or can be purchased at the Portland State University Bookstore. The Portland State University Bulletin is updated annually and Portland State University includes the most recent copy of the Portland State University Bulletin when it submits the institution’s Annual Report to NWCCU.

The Portland State University Bulletin opens with a “Quick Reference Guide”, which includes a listing of the schools and colleges with web addresses, the academic calendar, programs of study with minor, certificate or degree availability, information on university housing, and a key to the course descriptions.
The “Welcome to Portland State University” section includes the institutional mission and guiding themes; accreditation status; PSU’s connection to the City of Portland; information on tuition, fees, and aid; withdrawals and fee refunds, campus services; School of Extended Studies; and the Office of International Affairs.

The “Student Services” chapter details the Division of Student Affairs, the administrative unit that oversees advising, student conduct, academic honesty, student activities and leadership programs. The Enrollment Services section elaborates on the admission requirements, transfer credit policies, student records, registration and enrollment, degree requirements, assessment, grading systems, credit by examination, appeals and grievances, health resources, and other student services on campus.

“Undergraduate Studies” consists of University Studies, providing information on the Freshman Inquiry, Sophomore Inquiry, Upper-Division Cluster, and Capstone experiences. The University Honors portion elaborates on eligibility and admission and graduation requirements for this program and Military Science section lists its branches and courses.

The “Graduate Studies” chapter provides greater detail into the application process, admission requirements, and enrollment for graduate students. A complete list of graduate certificates, master and doctorate level programs are provided. This section offers information on final, oral, and written examinations including thesis and dissertation processes.

Seven chapters, one dedicated to each school or college, follow and detail particular information for each division but have a common set of information. All provide information on school/college administration, contact information, web address, degrees and programs offered, and admission and degree requirements. Brief course descriptions are given including course prefix, course number, course title, credits, and prerequisites if noted. Requirements for the majors and minors are also given.

In the “Directories” section, a listing of the Oregon State Board of Higher Education members is given with term expiration dates as well as regional location. The Oregon University System officers and member institutions are also provided. Names, titles, degrees held, and conferring institutions for administrators and academic faculty at Portland State University is also included in this section and divided by school/college and department. Emeriti and associated faculty are also included in departmental listings.

Portland State University provides students with Degree Maps, which outline the requirements for earning a degree at the institution. These maps identify degree progress milestones, pre-requisites and course sequences that are critical to staying on track. The maps are designed to assist students to stay on course as they progress to graduation, and encourage students to work with an Academic Adviser to adjust for variations in their academic plans. The maps are updated annually, to detail frequency of course offerings and enable students to constantly check their progress on fulfilling requirements.

2.D.6
Publications describing educational programs include accurate information on:

a) National and/or state legal eligibility requirements for licensure or entry into an occupation or
profession for which education and training are offered;
b) Descriptions of unique requirements for employment and advancement in the occupation or profession.

Portland State University provides accurate and current information to its students who may opt to take licensure testing. The Graduate School of Education’s Licensure webpage provides information on licensure programs and instructions. The Director of Licensure is a resource for Portland State University students as is the U.S. State Teacher Certification Offices information.

Students who complete the Master of Science degree in Speech-Language Pathology in the Speech and Hearing Sciences Department will also have completed academic and clinical requirements for the American Speech-Language-Hearing Association’s (ASHA) Certificate of Clinical Competence and for a Conditional Speech-Language Pathology License from the Oregon Board of Examiners for Speech-Language Pathology and Audiology. Students also have the option of completing requirements for an Oregon Initial Teaching License as a speech-language pathologist through the Oregon Teacher Standards and Practices Commission.

The Maseeh College of Engineering and Computer Science offers continuing education courses in civil engineering, mechanical engineering and electrical and computer engineering to assist individuals in preparing for the Oregon State Board of Examiners for Engineering and Land Surveying (OSBEELS) exam. OSBEELS regulates the practices of engineering, land surveying, and photogrammetry in the State as they relate to the welfare of the public in safeguarding life, health and property.

The curriculum in the School of Business Administration, the College of Urban and Public Affairs, the School of Social Work, and the School of Fine and Performing Arts is designed to provide foundational professional knowledge, building capacity, and socialization. These areas also address foundational subjects that graduates will need to understand if they decide to take exams required for professional licenses.

In compliance with the U.S. Department of Education’s requirements for gainful employment, Portland State University discloses information for certificate programs on the length of a program, the total cost of the program, employment fields, and debt incurred. This information is found on websites in each school/college that offers certificate programs.

Additional information about employment opportunities can be found in the Portland State University Bulletin under Advising and Career Resources and at the Advising and Career Services webpage. Advising and Career Services provides students and alumni information on career counseling, workshops, access to an on-line job database, and hosts annual job fairs.

2.D.7
The institution adopts and adheres to policies and procedures regarding the secure retention of student records, including provision for reliable and retrievable backup of those records, regardless of their form. The institution publishes and follows established policies for confidentiality and release of student records.
Record Security
The Office of Admissions, Registration and Records works collaboratively with other university departments, such as Office of Information Technologies, to ensure that student records are protected and appropriately maintained. The University provides for the security of student records and maintains private, accurate, complete, and permanent student records, including transcripts, in accordance with provisions outlined in Oregon Administrative Rules 580, Division 13: Student Records. Portland State University uses the Banner Student Information System to ensure controlled access to computerized student records. Individual staff members are granted access to Banner on a job-related, need-to-know basis, as requested and approved by their department head or director and approved by committee in the approval process.

Portland State University assigns randomly generated student identification numbers to all enrolled and new students, which has improved record security in the Student Information System. Students and the public are informed of policies related to privacy and security of records during New Student Orientation programs, and in the quarterly Portland State University Schedule of Classes. Staff members are informed on the job, partly through training added by Human Resources to familiarize new hires with FERPA provisions. Student records are retained and destroyed on a schedule defined by the Oregon University System’s General Records Retention Schedule. Data and records maintained in computing systems have adequate security and provision for recovery in the event of disaster.

The Portland State University Information Security Policy, developed by the Office of Information Technologies (OIT), guides managers and others with standards and procedures to protect Portland State University information systems. The policy outlines authority, scope, roles, responsibilities, policies, exceptions, and enforcements. OIT has developed both a disaster recovery plan, which of course includes student records and a business continuity plan. The institution’s remote disaster recovery/business continuation regional site is at Western Washington University. OIT sends data there daily and has the capacity to run Banner from that location. Data recovery plans and provision for data backups are continually being revised and are contained in Disaster Recovery Plan for Office of Information Technologies.

Confidentiality of Student Records
Portland State University complies with the Family Educational Rights and Privacy Act (FERPA), the Federal law that protects the privacy of student education records. The law applies to all schools that receive funds under an applicable program of the U.S. Department of Education. The state of Oregon has its own statutes and rules (Oregon Revised Statutes 351.065, and Oregon Administrative Rules 580-Division 13 - Student Records and 577-Division 30 – Student Records Policy) guiding student records that PSU abides by. Confidentiality laws prohibit Portland State University from releasing student-specific information to outside agencies or individuals (that includes parents and spouses). If a student wishes to release their information to another party, they may fill out and submit the Request for Release of Confidential Information to the Office of Student Financial Aid.

The student records privacy details how Portland State University uses student’s social security numbers and informs students on the notification of theirs rights under FERPA. Clear guidelines on confidential student records and details on what is and what is not directory information is provided at guidelines for release of student records. A list of frequently asked questions assists in
framing potential scenarios for requests for information. Additionally, a tutorial on how to responsibly handle student records is available for Portland State University employees.

2.D.8
The institution provides an effective and accountable program of financial aid consistent with its mission, student needs, and institutional resources. Information regarding the categories of financial assistance (such as scholarships, grants, and loans) is published and made available to prospective and enrolled students.

In supporting Portland State University’s mission by creating educational opportunities and supporting student success, the Office of Student Financial Aid and Scholarships assists students in determining eligibility for and planning of financial aid. The Portland State University Bulletin publishes information on eligibility including the application process for undergraduates, international, post-baccalaureate, and graduate students; the award notification process; award sources including educational grants and loans; federal work-study; privately funded; and institutional scholarships and awards. Portland State University’s policy on satisfactory progress for all students is also published in the Portland State University Bulletin.

Portland State University requires that first-time Federal Direct Stafford Loan borrowers receive entrance counseling. This enables students to become educated on their rights and responsibilities of borrowing funds. Exit counseling is also given prior to graduation or terminating enrollment. Information about loans, repayment options, and debt management strategies is also provided in helping students achieve sound financial planning and debt management.

Portland State University has recently reestablished the Tuition Review and Advisory Committee (TRAC). TRAC was formed by President Wiewel in January 2011 in response to the Oregon University System Board’s policy directive to create a campus wide committee to provide tuition setting advice and comment to Portland State University’s senior leadership. The charge of the TRAC is to provide advice and comment on tuition rate issues on an annual basis in relation to the annual budget process and the University’s annual recommendations to the Oregon University System Board on tuition rates. TRAC includes representation from student government, the faculty, and the University’s administration.

2.D.9
Students receiving financial assistance are informed of any repayment obligations. The institution regularly monitors its student loan programs and the institution’s loan default rate.

As noted in the Portland State University Bulletin, the Office of Student Financial Aid requires counseling for students when they enter and exit the institution if they assume loans. Additionally, information on loan repayment and debt management and default reduction is included in the Bulletin. The Office of Student Financial Aid and Scholarships also makes students aware of their obligation when they depart Portland State University, whether through graduation, withdrawing, or transferring. Information on the repayment grace period, repayment plans, loan forgiveness and cancellation, and consolidation are also provided. Direct links to external websites are also given for the following programs:
- **Federal Direct Stafford Loans** - (subsidized and unsubsidized)
- **Federal Perkins Loan**
- **Federal Direct Parent PLUS Loans**
- **Federal Direct PLUS Loans for Graduate and Professional Students**
- **Private Student Loans** - (alternative loans)

Portland State University uses its accreditation with NWCCU to establish its eligibility to participate in HEA programs and reports its cohort default rate for HEA subsidized and unsubsidized loans as required by NWCCU in its annual report.

2.D.10

The institution designs, maintains, and evaluates a systematic and effective program of academic advisement to support student development and success. Personnel responsible for advising students are knowledgeable of the curriculum, program requirements, and graduation requirements and are adequately prepared to successfully fulfill their responsibilities. Advising requirements and responsibilities are defined, published, and made available to students.

The goal of Portland State University's academic advising services is to assist students with understanding (a) the requirements for graduation and the University's institutional policies, (b) the campus resources available to them (c) the value of activities outside the classroom, and (d) the balance between students' responsibilities and those of the University. Advising is a critical component at Portland State University to ensure student success. A number of initiatives (effectiveness of policies, identifying at-risk students, intentional advising, improved communication, addressing student financial concerns, improvement of persistence, and management of capacity) focused on improving overall student success are provided on the [Student Success](#) website.

All new undergraduate students (freshmen and transfers) are required to attend an Orientation: Advising & Registration session offered by New Student Orientation prior to registration for their first term at Portland State University. Orientation is an important feature for new students because it connects them to the institution by assisting them in:

- Learning about Portland State University's curriculum
- Learning about campus resources
- Connect with current Portland State University students and other new students
- Receive the [Portland State University Bulletin](#) (catalog), a Registration Guide, and the [Student Handbook & Academic Planner](#)
- Meeting with academic advisers and departmental faculty
- Planning their first term schedule

All admitted first-year students are required to receive academic advising from their intended major department during their first year. Students who do not declare a major will receive advising in the Advising and Career Services. Students who [declare their major](#) are assigned an advisor in their major department.

Advising and Career Services plays a key role in counseling those students who are exploring, choosing or changing a major; assisting students encountering academic difficulties; helping co-
admitted students; making referrals to schools/colleges and academic departments for students with identified majors; and also encourages and trains other advisers across campus. Advising and Career Services supports students through a variety of workshops on topics like academic warning, transfer students, and the turntable advising weekly radio show.

Students in pre-professional programs (e.g. education, medicine, dentistry, nursing) may receive advising at either the major department or through the College of Liberal Arts and Sciences Advising Center. Students should contact their major department, their school/college advising center or the Advising and Career Services office to clarify their advising options.

Graduate and post-baccalaureate students are directed to contact their program or the Office of Graduate Studies directly for information about advising services.

Academic Advising Council is a Faculty Senate administrative committee that reviews the status of advising across campus and makes recommendations on best practices regarding policies and processes related to academic advising. The council reports annually to the Provost and the Faculty Senate.

2.D.11

Co-curricular activities are consistent with the institution’s mission, core themes, programs, and services and are governed appropriately.

The diversity and variety of co-curricular activities are listed in 2.D.1 and they reinforce the mission of the university by supporting student success in a number of endeavors. Co-curricular activities enhance the educational experience for students at Portland State and assist them in becoming more integrated into the community of the institution and the region. While co-curricular activities come under the direction of the Vice President for Enrollment Management and Student Affairs, the Dean of Student Life provides leaderships in the areas of

- Student Activities and Leadership Programs (SALP)
- Queer Student Services
- Women's Resource Center
- Student Legal and Mediation Services
- Sustainability & Outreach
- Campus Recreation
- Housing & Residence Life
- Commencement
- Student Ambassador program,

SALP provides students with the opportunities to join, create, and participate in one of the over 150 student organizations. These student organizations range in a variety of interest areas including Greek life, academic, honorary, arts and industry, political, service and advocacy, spiritual, and student government.

These co-curricular opportunities for students (noted in 2.A.17) directly support the mission and guiding themes of Portland State University and its desire to provide a campus environment which is
inclusive and encouraging. The Office of Dean of Students Life strives to educate and support the
development of positive behaviors in Portland State University’s students, staff, and faculty by
encouraging the campus to work together in creating and fostering opportunities for students.

2.D.12
If the institution operates auxiliary services (such as student housing, food service, and bookstore), they
support the institution’s mission, contribute to the intellectual climate of the campus community, and
enhance the quality of the learning environment. Students, faculty, staff, and administrators have
opportunities for input regarding these services.

Auxiliary Services at Portland State University consists of Transportation and Parking Services,
Conferences and Events, Food Services, Smith Memorial Student Union, Retail Services, University
Housing and Residence Life, Real Estate and Property Management, and University Place
Hotel. These essential support functions deliver important goods and services that enhance the
quality of life for students, faculty, staff and visitors. Programmatic initiatives housed within the
departments (residence life programming, academic support programs, bike community
programming, recreation via game room programming, lounge and student meeting space, and
conference support) provide opportunities for students to be involved, engaged, and integrated into
their academic and social life at the university. The result is a learning environment that extends
beyond the classroom. In addition, the quality of facilities, variety of retail, and growth of the
residential population serve to bring vibrancy to the campus and the university district. Finally,
students, faculty, staff and administrators have well-documented mechanisms (including advisory
boards) for grievance and petition, governance, and price setting.

2.D.13
Intercollegiate athletic and other co-curricular programs (if offered) and related financial operations are
consistent with the institution’s mission and conducted with appropriate institutional oversight.
Admission requirements and procedures, academic standards, degree requirements, and financial aid
awards for students participating in co-curricular programs are consistent with those for other students.

The mission of the Portland State University Athletic Department is closely aligned with the
institutional mission to educate and enhance the intellectual, social, cultural, and economic qualities
of urban life. Portland State University Intercollegiate Athletic programs were recertified by the
NCAA in 2010 through the self-study instrument. The athletic department follows all Portland
State University admission standards and expectations. Student Athletes are advised and supported
academically by a recently upgraded Advising and Academic Support Center. This program works
in alignment with other campus support programs such as the Disability Resource Center and
Student Health and Counseling. Student Athlete Financial Aid Awards are overseen by the Director
of Financial Aid. Appropriate policies and procedures are in place to address student appeals.

2.D.14
The institution maintains an effective identity verification process for students enrolled in distance
education courses and programs to establish that the student enrolled in the distance education course
or program is the same person whose achievements are evaluated and credentialed. The institution
ensures the identity verification process for distance education students protects student privacy and
that students are informed, in writing at the time of enrollment, of current and projected charges associated with the identity verification process.

Distance education and online course offerings at Portland State University use the same systems and mechanisms employed by the main campus to ensure student identity. Students must use their ODIN login and secure password to access their Desire2Learn course management system accounts to take online courses and to ensure authentication. Portland State University expects all students regardless of course location or course medium to abide by the Student Code of Conduct.

The Center for Student Health and Counseling offers Testing Services proctors make-up exams for Portland State University students who miss an exam due to illness or certain outside activities. Traditionally, instructors have given make-up exams in their office or in the department office at alternate times. Testing Services offers proctoring as a back-up service to instructors who may not have the time and space to supervise a student’s make-up exam. Instructions and procedures for instructors and students, who are required to provide photo identification, are articulated on the testing services website.

**Standard 2.E – Library and Information Resources**

2.E.1 Consistent with its mission and core themes, the institution holds or provides access to library and information resources with an appropriate level of currency, depth, and breadth to support the institution’s mission, core themes, programs, and services, wherever offered and however delivered.

The Portland State University Library provides an important role in supporting the institution’s mission and core themes. The institution’s dramatic growth, recent emphasis on faculty research and technological advances have required the library to become more flexible in meeting the ever-changing needs of students and faculty. In an effort to improve its effectiveness, the library has also moved much of the collection online to provide 24/7 access to library resources, that are readily available to all faculty and students, including those in distance education and online courses. They are able to access the electronic library from any location via a computer and their secure myPSU accounts.

In an example of civic leadership through partnerships, the library has aggressively pursued strategies to maximize purchasing power. The Portland State University Library leverages the materials budget by participating in shared purchasing agreements via the Orbis Cascade Alliance that supply electronic resources like journal packages, databases, e-reference materials, and e-books. In so doing, the library saves over 24% of the list price for databases purchased through this program; it also caps subscription inflation on many of these resources at 3-6% as opposed to the national average of 8-12%. With these journal packages, the library is able to supply five times the number of subscriptions it can afford as a single institution by partnering with our 36 academic colleagues in Oregon, Idaho, and Washington State. Portland State University pays approximately $250,000 for its Wiley/Blackwell electronic journals package via the Orbis Cascade Alliance that otherwise would cost approximately $1.7 million. Only twenty percent of materials expenditures are still for print; monographs principally in the humanities and social sciences are still often preferred in paper, but journals and reference materials are now almost exclusively purchased online.
FY 2010/11 statistics indicate that the online library is very well used:

- 1,674,163 online research sessions were logged;
- 4,696,762 database queries were made; and
- 1,550,687 full-text articles were downloaded.

Circulation of the print collections continues to remain strong: 171,571 items were checked out from the Millar Library collection in FY 2010/11 and an additional 24,436 books were borrowed from sister Alliance libraries via Summit.

Undergraduate students receive support for their instructional and research needs through the subscribed licensed databases and journal packages. Since the library materials budget has been virtually flat for the past decade, the library is purchasing many fewer monographs than in previous years. Summit, the patron-initiated borrowing service from the Orbis Cascade Alliance, provides many books from sister library collections within three days, so undergraduates are usually able to complete projects with the resources available.

Graduate students and faculty often need specialized research materials that are not readily available on campus. Since 2004, the PSU Library has implemented LibQUAL+tm, a nationally benchmarked and validated survey instrument, to measure user satisfaction and expectations. Results from the 2011 survey indicate that faculty are not fully satisfied with the accessibility of library resources or with the collections themselves. The adequacy gap for the question “The printed library materials I need for my work” has grown since 2008, while “Print and/or electronic journal collections I require for my work” continues to have the largest gap of all. In the latest survey, faculty have lowered their expectations about resources the library can provide. In LibQUAL+tm, variations of this faculty comment come from all colleges: “PSU has a limited research collection in my area of research.” In comparison to its Oregon University System-specified comparator institutions, Portland State University’s most recent National Center for Education Statistics data report library expenditures of $389 per student, the lowest among the 9 comparator institutions and about two-thirds of the average expenditure.

Improvements in student study areas and computer access to library resources demonstrate the institution’s efforts to improve student success. Two general access technology labs are located in the library. The Learning Ground, a newly renovated technology lab, features a range of technologies and workspaces for students, including an expanded computer lab, upgraded computer tables, improved assistive technologies, window seating conveniently located for access to power, wireless printing, technology support, and a new experimental area designed to offer innovative technologies for student collaboration.

The Millar Library continues to be a popular place for students, with 961,014 visits in FY 2010/11. It is not uncommon for all chairs to be filled during busy times during the academic quarters. The coffee shop is a great success and does a brisk business. In 2011, the Learning Center, a student tutoring service on campus, relocated to the Millar Library. The space on the second floor has been renovated and this student academic support service is now housed adjacent to the Library Research Center. Several group study rooms in the library have also been renovated and enhanced with technology.
In recent years, the library has added new programs to highlight resources unique to Portland State University and distinguish the institution nationally and internationally. A Digital Repository, PDXScholar, has recently begun to capture the scholarship generated by Portland State University's research efforts. The library is currently creating an online visual archive of Portland State University historical images and collecting working papers from the Economics Department, documents generated by the Institute of Portland Metropolitan Studies, faculty scholarship published in some open access journals, publications and reports from the Center for Lakes and Reservoirs, as well as digitally preserving electronic copies of all Portland State University dissertations and theses. A Digital Initiatives librarian has been hired to manage this area of growth for the Portland State University Library. As the collections captured here grow, so will the need to increase staffing to support these endeavors.

Portland State University Library’s Special Collections and University Archives promotes learning and discovery to advance research and scholarship by collecting, preserving, and, above all, facilitating access to primary resources of long-term historical value. Special Collections is home to unique materials dating from the 10th century to the present including rare books, scrolls, manuscripts, and archival collections. The University Archives holds the historical materials of Portland State University from its founding as the Vanport Extension Center in 1946 to the present. Special Collections and the University Archives are dedicated to supporting student success on both the undergraduate and graduate levels. Curriculum support activities for undergraduates have included providing access to rare books and other primary resources in classrooms to supplement or illustrate course instruction topics and providing overviews or introductions on conducting archival research. In some cases, materials from the collection have served as the core resource for an entire course. For example, a recent art history course was designed around provenance research for six selected manuscript leaves and scrolls from Special Collections that will culminate in a public exhibit in the Library. Graduate student work with Special Collections and the University Archives has included Public History students utilizing unique archival collections for original research core to their theses. In addition, the unit serves as a site location for practicum students and interns seeking practical engagement with library and archival science work.

In sum, the Portland State University Library has successfully managed the transition to a largely electronic library and provides undergraduates with information resources with an appropriate level of currency, depth, and breadth to support the institution’s mission, core themes, programs, and services. Given the realities of inflation in academic publishing and a challenging budgeting climate, however, the Portland State University Library information resources budget is strained to support faculty and graduate student research activity.

2.E.2
Planning for library and information resources is guided by data that include feedback from affected users and appropriate library and information resources faculty, staff, and administrators.

The library uses data and stakeholder input when making decisions or establishing policies. Portland State University participates in the annual EDUCASE student technology survey which helps to shape the institution’s service delivery plans and determining technological needs of Portland State University students.
Some additional examples of utilizing data or feedback in the decision making process were instrumental in the shaping of the:

- **2012-2014 Strategic Plan**
  During the Winter/Spring Terms of 2011, the library conducted a series of scenario-based visioning and planning sessions, which resulted in the *Strategic Plan for 2012-2014*. The library used the University’s strategic mission and guiding themes to inform its process, and incorporate user input and feedback obtained from discussion at the Faculty Senate, the Faculty Senate Library Committee, student focus groups, the Council of Academic Deans, and a town hall meeting. The library developed this plan in a context where many paradigm-shifting social, technological, environmental, educational, political, and aesthetic factors were affecting its operations. These factors have created a situation where the library has experienced decreased funding and staffing levels at the same time that it has experienced increased demands for resources, instruction, consultation, technological infrastructure, space, and services from most of its diverse constituencies. For this reason especially, we believe that the implementation of a focused, forward-thinking strategic plan, along with applying clear assessment and evaluation metrics, are critical to the continued success and vitality of the University Library.

- **Website Redesign**
  The most recent redesign of the library’s website was prompted by comments on the site on LibQUAL+™. This redesign made it easier to navigate the website and improved access to collections and communication with librarians.

- **Customer Service at Circulation**
  Noting a number of negative comments about service at the Circulation counter in the 2008 LibQUAL+™ survey, Access Services instituted a series of customer service trainings for circulation staff and built up training for circulation student workers. These trainings improved student, staff, and faculty satisfaction with the library. As a consequence, there were very few negative comments in the 2011 LibQUAL+™ survey.

- **Art History Textbook Project**
  In winter 2012, a generous donor enabled the library to purchase copies of the expensive textbooks for all Art History classes being offered. The library has generally avoided collecting text books in the past due to their high cost and frequent revision. In addition, the library purchased additional copies of the highest use books in Art courses. This expansion of library resources provided more educational opportunities for students and demonstrates the effectiveness of partnerships between the library and the community.

- **Role of the Faculty Senate Library Committee**
  The formal method of faculty involvement with the library is established in the Faculty Constitution, which establishes the Library Committee, one of the Portland State University Faculty Senate’s constitutional committees. Its primary roles are to advise the library on policies and directions, giving the library a venue to get input from the instructional faculty, and to serve as an advocate for the library to the rest of the University. Additionally, members of the Library Committee have been invited to serve on various library strategic planning groups.
Vacant Positions

Library Administration reviews vacant positions in the context of current needs and the evolving nature of library work. Through this process the library has, in recent years, reconfigured some jobs to create new roles: Digital Initiatives Coordinator, Head of Instructional Services, and Collection Development Librarian.

These examples demonstrate the connection between the Institutional mission and core themes and how the library has used data and feedback from faculty, students, staff, and administration in advancing the goals of the university.

2.E.3
Consistent with its mission and core themes, the institution provides appropriate instruction and support for students, faculty, staff, administrators, and others (as appropriate) to enhance their efficiency and effectiveness in obtaining, evaluating, and using library and information resources that support its programs and services, wherever offered and however delivered.

The recent hire of the new Head of Instructional Services demonstrates the library’s commitment to provide information literacy instruction to students, faculty, and staff. Librarians offer course-embedded information literacy instruction in many University Studies Freshman and Sophomore Inquiry classes as well as through the High School Senior Inquiry and the Challenge Program courses offered at Portland-area high schools. The subject liaison librarians also teach critical inquiry skills in many of the courses core to specific disciplines at the undergraduate and graduate levels. The Library Learning Outcomes are designed to improve student inquiry skills and are tied to the University’s Undergraduate Campus-Wide Learning Outcomes of Ethical Behavior and Critical and Creative Thinking. Librarians provide course-related instruction at the request of disciplinary faculty but library instruction is not specifically required in any department curriculum.

Librarians offer tours and workshops in an effort to reach all students and faculty interested in receiving instruction. In partnership with the Office of Graduate Studies, the library recently began offering a series of subject-specific library workshops geared towards graduate students. In an effort to support faculty scholarship, librarians offer workshops and one-on-one research consultations with subject liaison librarians. Point-of-need instruction for faculty, students, staff, and community members is largely provided at the reference desk. The reference desk is open 64 hours per week and reference librarians answer questions at the desk and via phone, email, instant messaging and text messaging (SMS). Students, faculty, and staff can schedule a consultation with the appropriate subject librarian. They can also get assistance with their research 24/7 through the library’s participation in L-net, an Oregon virtual reference cooperative. The library’s reference services are used quite heavily, resulting in 28,335 reference transactions in fiscal year 2011.

To assist students wherever they are at their point of need, the library has expanded its online instructional offerings. In 2011, the library purchased LibGuides, a system that allows for the easy creation of web-based subject guides, course guides, and tutorials by librarians. This has led to a proliferation of guides designed to support research in specific subjects and courses. These library guides are embedded at the course level in the University’s primary learning management system, Desire2Learn (D2L), through a widget that dynamically displays links to instructional content specific to that course or subject. The library has also created a number of general online tutorials geared towards students, including the comprehensive Library Research Tutorial. Librarians recently
began offering online versions of their workshops using web conferencing software, which allows people to benefit from synchronous library instruction wherever they located.

The library is making good progress in delivering information services as well as collections wherever a course is being offered and in whatever format of instruction delivered at Portland State University.

2.E.4
The institution regularly and systematically evaluates the quality, adequacy, utilization, and security of library and information resources and services, including those provided through cooperative arrangements, wherever offered and however delivered.

The Faculty Senate Library Committee, established by the Faculty Constitution, consists of seven faculty members and two students, which meets regularly to advise the University Librarian. The committee provides annual reports to the Portland State University Faculty Senate on the quality, adequacy, and utilization of the library. Security of the library aligns with campus policy and is monitored by Campus Public Safety Office and the Office of Information Technology. All vendor contracts include language requiring the vendor to adhere to Portland State University security standards. Additionally, security measures are tested via at least three audits annually in the Oregon University System Financial IT audit, Oregon University System targeted audits performed by the Oregon University System Internal Audit Team, and by penetration testing performed by external security professionals.

Quality:
The library routinely uses the LibQUAL+ survey data to better understand our user's opinions on the quality of our resources, services, and facility and to make improvements. Details of related improvement projects are described in 2.E.2.

Cooperative arrangements:
The library participates in many cooperative arrangements that help leverage resources. A few examples:

- The library participates in the Orbis Cascade Alliance’s Demand Driven Acquisitions Pilot Project, which makes a large collection of scholarly e-books available to our patrons.
- The library participates in the Orbis Cascade Alliance’s RFP process for the development in a shared Integrated Library System (ILS) for all 37 Alliance libraries, which will result in increased efficiencies in technical services operations. The library also participates in the development of collaborative technical services guidelines for work in the shared ILS environment.
- The library implemented shelf-ready books through WorldCat Cataloging Partners for most of our university press approvals and English language monograph orders. This has greatly shortened the time it takes to make materials available after they have been ordered and at the same time has freed-up staff to work on other more difficult tasks.
- The library is the most involved academic participant in the Oregon Libraries Network (L-net), a statewide pool of librarians which provides 24/7 chat/text/email reference services.
• The library collaborates with the Oregon Health and Science University (OHSU) and Oregon State University (OSU) to support the Masters of Public Health program.
• With Oregon State University (OSU) and the University of Oregon (UO), the library participates in shared purchases of electronic journals, such as Elsevier's SciVerse electronic journal package (formerly known as Science Direct). Portland State University Library pays $318,000 for this package which would otherwise cost $1.5 million.
• The Northwest Digital Archives (NWDA) provides enhanced access to archival and manuscript collections in Idaho, Montana, Oregon, Alaska, and Washington through a union database of Encoded Archival Description (EAD) finding aids.
• The Western Regional Storage Trust (WEST) is a distributed retrospective print journal repository program serving research libraries, college and university libraries, and library consortia in the Western Region of the United States.
• The library supports local and regional community initiatives, such as the Archives Crawl, a yearly event highlighting the collections of regional archival organizations, as well as supporting the statewide Everybody Reads program.

The library belongs to several national and international organizations, such as:
• LOCKSS (Lots of Copies Keeps Stuff Safe), which is an international community initiative that provides libraries with digital preservation tools and support so that they can easily and inexpensively collect and preserve their own copies of electronic content.
• The Scholarly Publishing and Academic Resources Coalition (SPARC) is an international alliance of academic and research libraries working to correct imbalances in the scholarly publishing system. Developed by the Association of Research Libraries, its pragmatic focus is to stimulate the emergence of new scholarly communication models that expand the dissemination of scholarly research and reduce financial pressures on libraries.
• The Coalition of Networked Information (CNI) is an organization dedicated to supporting the transformative promise of digital information technology for the advancement of scholarly communication and the enrichment of intellectual productivity.

A number of departmental reading rooms across campus serve as additional topical resources for students, staff, and faculty. Specific locations for materials are the Middle East Studies Center, Chinese Language and Culture Resources Library, Women, Gender and Sexuality Studies Library, Metropolitan Instructional Support Laboratory (MISL), the Dirce Moroni Toulan Library, and the faculty development lending library in the Center for Academic Excellence. These collections are not inventoried or maintained by the University Library and are not generally accessible to all campus users.

**Standard 2.F – Financial Resources**

2.F.1
The institution demonstrates financial stability with sufficient cash flow and reserves to support its programs and services. Financial planning reflects available funds, realistic development of financial resources, and appropriate risk management to ensure short-term solvency and anticipate long-term obligations, including payment of future liabilities.
Financial resources play a key role in the institutional guiding themes, with resource development being one of Portland State University’s five strategic goals. In addition, finances support how PSU is able to meet the themes of providing educational opportunities, achieving global excellence, improving student success, and how Portland State University is able to provide civic leadership by its financial decisions. To be effective, Portland State University needs to have fiscal stability and the ability to maintain fiscal flexibility to maximize opportunities that are presented to the institution.

**Financial Stability**
Portland State University revenue sources are divided into two major categories: (1) Education and General Revenue; and (2) Non-Education and General Services Revenue. For fiscal year 2010-11, **Education and General Resources** funds derived from the following sources:

- 65% Tuition
- 20% State appropriations
- 15% Other sources

Portland State University, like most institutions in Oregon, has been facing dwindling state support. Thus, Portland State University has had to rely more heavily on more revenue from tuition, as well as other non-education and general fund sources.

At Portland State University, **Non-Education and General Service Revenue** is generated from three main sources. For fiscal year 2010-11 these sources include:

- 24% Other Auxiliaries
- 21% Educational Activities
- 21% Student Operations/Housing

As reported in the [Oregon University System Annual Report](http://www.uoregon.edu/~uosinformation) for fiscal year 2010-11 (Portland State University information beginning on p. 51), 36% of Portland State University operating expenses went to instruction, approximately 12% went to research, 7% went to student aid, and 2% was committed to public service. These costs for teaching, research and outreach programs demonstrate the connection between the institutional guiding themes and how they are supported financially by Portland State University. This resource distribution pattern represents a change from previous years with expenditures in each category up from fiscal year 2009.

Portland State University has placed a growing emphasis on research, with $64.8 million in expenditures for the 2011 academic year. This investment signals the transformation of the University into an incubator for innovation and exploration supporting the theme of innovative research and scholarship. Building on the distinct character of our location and legacy, we’re establishing Oregon’s leading urban research university as one of the nation’s best.

**Financial Planning**
Although the University has absorbed a number of budget cuts over the past few years, the institution has a history of fiscal stability and sound fiscal management. The University budget funds many **diverse offerings**. Higher levels of funding are observed in specialized, technical, and professional programs. However, with the continued decline in state appropriations, coupled with mid-biennial cuts, Portland State University has been unable to totally protect budgets in instructional areas. Portland State University mitigates budget fluctuations through a comprehensive **budget planning and process**, which incorporates multiple administrative levels and the Faculty Senate Budget Committee.
The diversity of Portland State University’s revenue sources: tuition and fees, indirect costs, and other miscellaneous revenues, enables the University to maintain budget reserves and to factor these reserves into its annual budgeting process. Portland State University currently sets aside funds in three categories: (a) utility rate increase reserves, (b) operating reserves, and (c) institutional reserves. Many deans also maintain a reserve, which results in a carry forward to their accounts at the start of each new fiscal year.

With the enactment of Senate Bill 242 in January 2012, the state system of higher education ceased to be a state agency and instead became a state entity. Thus, the policies and rules that regulate higher education administrative practices in Oregon will change. For example, the University General Counsel now represents Portland State University in all legal matters, as opposed to the Oregon Department of Justice, and Portland State University, in collaboration with the Oregon University System has assumed the Risk Management functions, including risk pools and insurance procurement. Fiscal oversight is still provided by the Finance & Administration Committee of the State Board of Higher Education, financial reporting is still aggregated at the system level, banking, treasury management and bond issuances are still provided through the Oregon State Treasury, and annual financial and A-133 audits are still contracted by the Secretary of State. Although some late fund transfers temporarily skewed the university’s overall fund balance, as detailed in Portland State University Current Fund Balance Analysis, its central fund balance continues to be within the appropriate fund balance range. Oregon University System policy currently mandates that all of its institutions maintain a fund balance in the 5% to 15% range.

2.F.2
Resource planning and development include realistic budgeting, enrollment management, and responsible projections of grants, donations, and other non-tuition revenue sources.

Portland State University has been focused on improved efficiencies and resource usage. Increased usage of technology in the curricular process, in course delivery, in employee training, and hiring has improved resource productivity. Through the use of improved technology with the Ad Astra scheduling software and the implementation of the minimum enrollment policy a more effective use of space across campus is being implemented to maximize efficiencies and course enrollments. To meet enrollment and other targets established by Oregon University System, Portland State University has identified Quantifiable Indicators for the guiding themes of the institution and believes these long-term goals will provide better opportunities for student success while improving resource usage across campus.

Enrollment management is a key component of the President’s University Planning document in an effort to improve institutional efficiency and effectiveness. The action items of the plan:

- Formalize enrollment management plan, including fee remission and scholarships to support recruitment, retention, and graduation
- Strategically recruit domestic, high-achieving, and nonresident and international students
- Strengthen community college connections
- Plan and implement steps to expand student housing
- Raise philanthropic funding for scholarships to support student access and success
The Vice President for Enrollment Management and Student Affairs has identified recruitment and strategic enrollment management initiatives as critical to the success of University Planning. Portland State has also established the position of Associate Vice President for Enrollment Management to provide the leadership and coordination for a comprehensive enrollment management strategy that is aggressive, innovative and opportunist and is consistent with the goals, mission and resources of the university. Reporting to and working closely with the Vice President, the Associate Vice President provides overall leadership for undergraduate and graduate admission to the university including international admission, domestic and international enrollment partnerships, records and registration, new student recruitment, student orientation programs, financial aid and scholarships, and enrollment management technology.

The Provost hosted a Winter Symposium in 2011 to discuss how enrollment management and curricular effectiveness and efficiency can be successful strategies for increasing resources. Building on recommendations from the Long Term Institutional Fiscal Strategies group, the Winter Symposium was the culminating event in a two-year long set of meetings and events to communicate fiscal strategies and to develop a set of potential actions. The program materials were also made available to the campus community.

The Provost has also created the position of Associate Vice Provost for Undergraduate Student Success and Dean of Undergraduate Students to provide leadership and coordination of activities related to retention, persistence, and graduation in support of institutional student success initiatives. Information can be found on a blog created by the Associate Vice Provost dealing with retention rates and the impact of financial concerns on students among other topics.

The Division of University Advancement and the Office of Research and Strategic Partnerships have vital roles in the attainment of Portland State University’s guiding themes. Both areas enhance Portland State University’s civic connection and leadership and are important in obtaining external funding, improving educational opportunities, the institution’s visibility and credibility.

Philanthropic funding, which assists the university in meeting its core themes and goals, has been identified as a major component of long-term fiscal stability. Philanthropic support has increased by 37 percent in the last two years. The total number of six- and seven-figure gifts has more than doubled. These results are indicators of success for the major comprehensive campaign the university is undertaking. Additionally, the size of the endowment at the Foundation is growing. “The Impact of Giving to Portland State University” is the annual report on philanthropic support for the university in assisting the university in meeting its core themes and goals.

Research expenditures have doubled in seven years to reach a record $64 million. New funding included a $3 million grant from the National Science Foundation’s prestigious “IGERT” graduate training program, dedicated to sustainable approaches to ecosystem service challenges in urbanizing regions.

The investment return on Portland State University's endowment has out-performed similarly sized university endowments, according to the 2011 findings of the National Association of College and University Business Officers. Data gathered from 823 U.S. colleges and universities showed an average endowment return of 19.4 percent for the 2011 fiscal year for endowments in the range of $25 to $50 million. The Portland State University Foundation's endowment totaled $40.9 million as
of June 30, 2011, and the fiscal-year return was 23.2 percent—3.8 percent higher than other universities.

2.F.3
The institution clearly defines and follows its policies, guidelines, and processes for financial planning and budget development that include appropriate opportunities for participation by its constituencies.

Portland State University adheres to policies outlined in the Oregon State Board of Higher Education Internal Management Directive, Section 6 Finance and Business Affairs and in the Oregon University System Fiscal Policy Manual, and in Oregon law (ORS 293.265) related to budget development and fund management by the institution. The University and the Portland State University Foundation have developed a joint gift policy that directs gifts to the Portland State University Foundation.

The University Budget Planning Process is governed by the University Budget Team (UBT) and managed by the Budget and Planning Office. The Education and General (E&G) portion of the budgeting process begins with a review of faculty and staff rosters. These rosters, and the associated benefit costs, comprise approximately 70% of the total E&G Budget. Establishing a comprehensive budget involves review by fiscal staff, the Vice President for Finance and Administration, the Provost and Vice President for Academic Affairs, the Vice Provost for Academic Fiscal Strategies and Planning, Deans and Directors. UBT recommendations are made public. Final recommendations, with public input, are sent by the UBT to the President in late spring. All materials are posted on the Budget Department’s website. Once the budget is set and balanced -- based on final budget allocation figures from the Chancellor's Office -- the final Budget document is posted on the Budget website and an e-mail is distributed to advise Deans and Directors that the budget has been posted.

After the budget approval process concludes, and the new fiscal year begins July 1, any necessary revisions are routed through the Budget Office for approval and posting. Transfers can be made by Deans and Directors within their respective schools or colleges using journal vouchers completed within the Banner FIS system, but only within the level of unit budgets.

In 2010, Portland State University undertook a campus-wide planning effort that will result in a new budget process over the coming years. The Financial Futures Taskforce, charged by the President and consisting of a representative body of deans, vice presidents, faculty, students and staff worked for nearly two years to produce a set of budget allocation principles that would support a new comprehensive budgetary strategy that incents schools and colleges to maintain an ideal mix of enrollment and faculty activity distributions, which maximizes revenues while improving the quality of their instructional and research programs. Budget topics and issues were raised in campus-wide forums to keep the entire institution appraised of developments over time.

As Portland State University begins the process of transitioning to a new Performance Based Budgeting model, the community will be kept informed of developments and their feedback will be solicited via a newly created project website. This new model will connect the budget process with the performance of each unit. The underlying philosophy holds that each college or unit is rewarded for its generation of resources, net of the expenses required for their generation. Two key principles for Performance Based Budgeting are a) that the process supports the academic mission and does not drive it and b) expenditures are aligned with the achievement of institutional strategic
priorities. While the conversion to a new budget allocation model takes place, the existing budget
development process continues and is articulated to the campus on the Finance & Administration
webpage.

2.F.4
The institution ensures timely and accurate financial information through its use of an appropriate
accounting system that follows generally accepted accounting principles and through its reliance on an
effective system of internal controls.

The Oregon University System is audited annually by an independent external body in accordance
with auditing standards generally accepted in the United States of America and the standards
applicable to financial audits contained in Government Auditing Standards, issued by the Comptroller
General of the United States. Those standards require that an audit is planned and performed to
obtain reasonable assurance about whether the basic financial statements are free of material
misstatement and conform to accounting principles generally accepted in the United States of
America.

Portland State University is subject to the accounting and budgeting policies contained in Oregon
State Board of Higher Education Internal Management Directives (IMDs) and the Oregon University System
Fiscal Policy Manual. All Oregon University System institutions use SCT Banner as their enterprise
financial accounting and reporting system. High-level policies and table definitions for Banner are
maintained at the Chancellor’s Office, with institutions having the ability to implement institution
specific tables and reports within the parameters set by the Chancellor’s Office. Portland State
University utilizes multiple modules of Banner, including Finance, Accounts Receivable, Student
Regular upgrades issued by SCT Banner are reviewed, tested, and installed on a timely basis to
ensure that systems remain in compliance and function properly. Any journal entries processed to
transfer account codes are subject to approval by business offices, deans, directors or chairs.

In December 2011, Portland State University completed a self-assessment of its internal control
environment and presented it to the Finance & Administration Committee of the Oregon State
Board of Higher Education in January. The report focused on a review of the overall control
environment at the university, including ethics, training, policy development, and senior level
staffing and experience. The review found the control environment is adequate and functions as
intended. The full report detailing Portland State University’s self-assessment process and related
observations was raised at January 20, 2012 meeting of State Board of Higher Education.

2.F.5
Capital budgets reflect the institution’s mission and core theme objectives and relate to its plans for
physical facilities and acquisition of equipment. Long-range capital plans support the institution’s
mission and goals and reflect projections of the total cost of ownership, equipment, furnishing, and
operation of new or renovated facilities. Debt for capital outlay purposes is periodically reviewed,
carefully controlled, and justified, so as not to create an unreasonable drain on resources available for
educational purposes.
The Office of Finance and Administration is the primary steward of more than 50 buildings compressed into a 50 acre campus. A number of units within the division, including Capital Planning, Capital Finance, and Facilities work collaboratively with the Office of Academic Affairs, Enrollment Management and Student Affairs, and the schools and colleges to develop capital budgets based on the university's short and long-term physical plans, needs, and building conditions. The institution expects to add at least 10,000 and possibly as many as 20,000 students over the next 25 years. To address this growth, the university has developed a University District Framework Plan that will guide its capital planning efforts for the foreseeable future.

Portland State University continues to address its needs for additional space through selective leasing, building purchases and new construction. Many of the older assets on its books are fully depreciated, and therefore the liabilities to assets ratio may seem high. However, Portland State University's debt service as a portion of expenditures is well within the limits of Standard & Poor's low carrying charge.

* Bond Debt Chart

2.F.6
The institution defines the financial relationship between its general operations and its auxiliary enterprises, including any use of general operations funds to support auxiliary enterprises or the use of funds from auxiliary services to support general operations.

Oregon University System allows for institutional control over indirect costs section 15.105 Auxiliary Enterprise Indirect Cost Allocation of the Oregon University System Fiscal Policy Manual, which states:

“It is OUS policy that auxiliary enterprise activities be self-supporting, generating sufficient operating revenues to cover operating expenses, including direct expenses and the allocable portion of indirect costs borne by other units of the university. The allocation of indirect costs should be recorded within the accounting records of the institution. Each OUS institution will develop and implement an indirect cost allocation policy and plan for allocating the applicable portion of the institution’s indirect costs to its auxiliary enterprises.”

The roles and responsibilities of auxiliary enterprises at the institutional level are set forth in Roles & Responsibilities - Auxiliary Enterprises & Other Activities section 15.001, where the institution’s roles and responsibilities in Telecom, Computer Services, Housing/Dining, Other Food Services, Student Centers, Health Services, Parking, Bookstores, Other Rentals, Other Auxiliaries, and Athletics are outlined.

While Portland State University's educational and general operations are not dependent upon auxiliary enterprise income, most Auxiliary Services contribute overhead charges (currently set at 20%) on their expenditures to help fund the University's budget. As of 2010, the collective Auxiliary Services Operating Budget contributes approximately $1,500,000 annually. A $1.5 million contribution represents less than 1% of the Educational and General budget for the University and cannot be considered a dependency on auxiliary funding.
2.F.7
For each year of operation, the institution undergoes an external financial audit, in a reasonable timeframe, by professionally qualified personnel in accordance with generally accepted auditing standards. Results from the audit, including findings and management letter recommendations, are considered in a timely, appropriate, and comprehensive manner by the administration and the governing board.

The federal government requires an annual federal compliance and internal control audit of expenditures charged to federal grants and contracts. The Oregon Secretary of State Division of Audits (DOA) is responsible for performing an annual financial audit of the Oregon University System Comprehensive Annual Financial Report (CAFR). DOA contracts with an independent audit firm to perform the audit, including required fieldwork, testing, and formal issuance of an audit opinion. In addition, DOA contracts with the firm for the annual A-133 compliance audit. The audit, performed for the state of Oregon as a whole, follows the requirements of OMB Circular A-133. The OUS Controller’s Division completes the annual financial statements and coordinates with Oregon University System Internal Audit and DOA on all audit activity. In addition to the financial audit, independent firms perform separate audits for the NCAA and for the Foundation as required.

The Oregon University System Fiscal Policy Manual outlines roles and responsibilities, as well as policies and procedures for budgeting, accounting, and fiscal reporting and monitoring. A complete guide to closing the fiscal period and preparing for the external audit and financial statement preparation and review are outlined in the Oregon University System Controller’s Division year-end/fiscal audit procedures.

Portland State University is subject to Oregon State Board of Higher Education Internal Management Directives, section 6-Finance and Business Affairs that require all accounting records and reports to be in conformity with generally accepted accounting principles. The Oregon University System is audited on an annual basis by an auditor contracted through the Oregon Secretary of State’s Audits Division. According to the 2011 auditor's report, in a letter to the State Board of Higher Education (p. 8)

In our opinion, based on our audits and the reports of other auditors, the basic financial statements referred to above present fairly, in all material respects, the financial position of Oregon University System and its discretely presented component units as of June 30, 2011 and 2010, and the changes in its financial position and its cash flows for the years then ended in conformity with accounting principles generally accepted in the United States of America.

Portland State University undergoes an annual independent audit as part of the Oregon University System. Periodic Oregon University System internal audits are performed by the Internal Audit Division. An audit report is published as part of the documents produced in the audit process. All of Portland State University’s fiscal operations and corresponding internal controls are subject to review by the Oregon University System Internal Audit Division. The university collaborates with the Internal Audit Division to provide input into the audit plan, assemble necessary data for audits, ensure recommendations are reasonable and practical, and implement recommendations as appropriate. The Oregon University System Fiscal Policy Manual requires institutions to implement recommendations provided by the external auditors.
Internal Audit Division, housed under Oregon University System, performs routine audits as well as special audit requests. Although Portland State University does not have an internal audit function, there are two Oregon University System internal auditors stationed on the Portland State University campus to answer specific questions and ensure compliance. Internal audit reports are available in hard copy through the Office of Business Affairs at Portland State University, or through Internal Audit at Oregon University System. Reviews completed by the Oregon University System Internal Audit Division include the entrance conference, examination of procedural steps to conduct the audit, developing a draft report, obtaining management responses to suggestions, issuance of a report to institution and Oregon University System management, and follow-up in six to twelve months to ensure that agreed upon changes have been implemented. Oregon University System has recently implemented a financial concerns “hot line” for reporting of potential fiscal irregularities.

Oregon State Board of Higher Education Internal Management Directives, section 1 – Administrative Organization and Procedures that require university presidents to report directly to the Chancellor concerning any events that substantially affect the well-being of the institution. The Chancellor is then required to inform the Oregon State Board of Higher Education. The President recommends to the Chancellor any proposals for significant changes of policy, plans, budget or standards requiring approval of the Board or Chancellor. The Chancellor decides whether to take action or to recommend that the Board take action. Oregon State Board of Higher Education Internal Management Directives also define the expectations for university presidents to attend board meetings to discuss matters that affect their institutions.

Project reports and fiscal recommendations are presented to the Oregon University System and the format of these reports is consistent across all Oregon University System institutions allowing for data comparability. Each campus prepares the report, which is reviewed and revised in consultation with Oregon University System staff. Portland State University’s President and/or Vice President for Finance and Administration are in attendance at each Oregon University System Board meeting when these reports are reviewed. This also offers an opportunity for the Board to query the President about progress in particular areas.

As shown in the Portland State University organization chart, the Vice President for Finance and Administration reports to the President. The University Controller and the Associate Vice President for University Budget and Planning report directly to the Vice President for Finance and Administration (FADM). Under the Provost, the Vice Provost for Academic Fiscal Strategies and Planning works closely with the Associate Vice President for Budget and Planning on fiscal issues.

All audit recommendations are reviewed by the President, who updates the President’s Executive Committee regarding the information. The President’s Executive committee ensures any and all corrective actions are implemented as quickly as possible and the Vice President for Finance and Administration has specific responsibility for implementing audit findings.

2.F.8
All institutional fundraising activities are conducted in a professional and ethical manner and comply with governmental requirements. If the institution has a relationship with a fundraising organization that bears its name and whose major purpose is to raise funds to support its mission, the institution has a written agreement that clearly defines its relationship with that organization.
**University Advancement** is responsible for fundraising activities to support the mission of the university. University Advancement has fundraisers in its central office and in colleges and departments. It oversees alumni relations and manages the donor database. The purpose and mission of the Portland State University Foundation, a supporting 501(c) (3) organization, is to cultivate and manage both monetary and volunteer support for Portland State University and supporting and promoting the mission of the university.

The Portland State University Foundation oversees the acceptance and receipts of gifts, the management and investments of endowed and expendable gift funds, and its board collaborates with University Advancement in multiple fundraising activities. Endowments and life income funds have been established at the Foundation. The Foundation and the University work closely to ensure compliance with donor intent and proper gift stewardship. An investment committee establishes the foundation’s investment policies and guidelines. A gift acceptance committee ensures that gifts received meet the mission of the institution. The Foundation is independently audited. The Foundation’s financial information including a 2010-2011 Audit/Consolidated Financial Statements can be found on the Foundation webpage.

Portland State University’s relationship with the Portland State University Foundation is reviewed and renewed every two years in a Foundation Agreement and signed by the Oregon University System Chancellor, the Portland State University President, Portland State University’s Legal Counsel, the Portland State University Foundation President, and Portland State University Foundation’s Legal Counsel.

Records pertaining to endowments and life income funds at the Portland State University Foundation are maintained at the foundation. Documents for state-invested endowment funds have copies at Portland State University’s Office of Business Affairs and originals maintained by the Oregon University System.

The Portland State University Foundation does have affiliated organizations which include:

- Friends of History
- RAPS (Retirement Association of Portland State University)
- Geneforum
- Friends of the Columbia River Herbarium
- Friends of English

Portland State University also maintains some endowments through Oregon University System that are invested by the State of Oregon. Earnings are credited by the Oregon University System to Portland State University. These investments are audited as part of the Oregon University System independent audit.

Both University Advancement and the Foundation subscribe to the standards of CASE ethics, the Association of Professional Researchers for Advancement, and adhere to the Donor Bill of Rights. University Advancement clearly states this on its webpages. Additionally, fundraising ethics and practices are also available on topics such as:
Standard 2.G – Physical and Technological Infrastructure

2.G.1
Consistent with its mission, core themes, and characteristics, the institution creates and maintains physical facilities that are accessible, safe, secure, and sufficient in quantity and quality to ensure healthful learning and working environments that support the institution’s mission, programs, and services.

With the motto, “Let Knowledge Serve the City”, the university’s mission, programs, services and physical character are woven into the urban fabric and extend into the regional community. The campus encompasses the city’s linear park blocks and is readily accessible to local and regional students, faculty and staff. The physical facilities are organized and developed to provide a vibrant, safe and healthful urban environment for civic engagement and life-long learning.

Construction and renovation play an important role at the institution to provide safe, sufficient, and updated research classrooms. Large projects such as the Science Building 2 Infrastructure Upgrade and Modernization and the Campus Steam & Chilled Water Loop support and encourage world class research activities. These features also improve efficiency of the campus infrastructure. The Collaborative Life Sciences Building project in the Portland Waterfront area supports the institutional mission by strengthens the working relationship between the regional institutions. This building project creates a state of the art facility for life sciences, research and teaching, while meeting the increased demand for classroom space. Portland State University has also partnered with the City of Portland in building the Academic and Student Recreation Center as an example of civic leadership. The Portland State University: University District Framework Plan defines a vision for the future of Portland State University and its surroundings in central Portland. The Plan outlines goals and strategies towards making Portland State University a more sustainable, vibrant Portland institution and hub of learning excellence.

Portland State University continues to add new physical facilities that conform to the vision of the University’s framework and support the constant improvement in the quality and quantity of space. To address the increasing demand for student housing, Portland State University in partnership with American Campus Communities is constructing the University Pointe at College Station. This newest building in the suite of student housing choices will provide an excellent complement to the other university housing options.

The First Year Experience and the Global Village are Living Learning Communities which encourage student success by creating a more traditional college experience by offering a nurturing environment for students. These Living Learning Communities help students establish social networks while becoming familiar with the university and the city. Educational and social programs are held regularly to aid students in navigating the University System.
2.G.2
The institution adopts, publishes, reviews regularly, and adheres to policies and procedures regarding the safe use, storage, and disposal of hazardous or toxic materials.

Environmental Health and Safety policies implement fundamental health and safety concepts that reduce and prevent injury and illness due to hazards across the institution. Areas of control include hazardous waste, lab safety, and occupational health and safety.

As required by state and federal regulations, Portland State University maintains a Chemical Hygiene Plan to establish procedures for the safe use of hazardous and toxic chemicals in laboratories on campus. For worksites other than laboratories, a Hazard Communication Plan is in place to ensure employees are informed of the hazards associated with materials used in their workplaces and understand safe work practices for using these materials.

Safe use and disposal of radioactive materials is addressed in the campus Radiation Safety Program Guide.

These plans are implemented through training programs and technical support from campus environmental health and safety professionals. All three of these plans are under review in 2012 and will be updated to reflect current best practices and address emerging safety issues in higher education environmental health and safety.

Portland State University also has a well-established hazardous waste management program to ensure safe and compliant disposal of laboratory chemicals, maintenance-related chemicals, biohazardous materials, and other regulated wastes.

Faculty at Portland State University are very active in establishing policies around the safe usage, storage, and disposal of toxic materials. Faculty Senate committees that address these issues include Bio-Safety Committee, Chemical Hygiene/Laboratory Safety Committee, Radiation Safety Committee and University HIV Committee. Additionally, the campus maintains a Campus Safety Committee composed of management and represented employees charged with identifying and addressing occupational safety concerns on campus. Committee participation is not exclusive to faculty but considers student and community perspectives.

2.G.3
The institution develops, implements, and reviews regularly a master plan for its physical development that is consistent with its mission, core themes, and long-range educational and financial plans.

In 2010, Portland State University developed a master plan entitled the Portland State University University District Framework Plan. This plan took approximately two years to develop and included involvement from dozens of university faculty, staff and students as well as members of the local community. These stakeholders and interested parties participated in open houses, meetings, and work sessions to prioritize the community’s perspective on the future physical structure of the campus. The framework is aligned with the institution’s mission and core themes. The relationship of the framework to the university's core themes is clearly described on p.22 of the plan. This
University District Framework Plan is reviewed regularly by Portland State University administrators and is the guiding document for physical development planning and the university's capital project requests to the state legislature.

2.G.4
Equipment is sufficient in quantity and quality and managed appropriately to support institutional functions and fulfillment of the institution’s mission, accomplishment of core theme objectives, and achievement of goals or intended outcomes of its programs and services.

Portland State University is fully wired for Internet connectivity with many building having wireless access. Computers and other technological equipment are updated regularly. University classrooms are equipped with instructional technology. This and other aspects of providing technology at Portland State University are addressed in sections 2.G.5 through 2.G.8.

Research laboratories, usually funded through grants, are furnished with modern equipment, even though laboratory furniture and other materials may be dated. The significant increase in new construction and renovation projects over the last decade has contributed to the general improvement in classroom and instructional laboratory equipment. This is evident in the Lincoln Hall renovation project for the School of Fine and Performing Arts. External feedback has also encouraged schools and colleges to dedicate funds for equipment replacement. The findings of the ABET external evaluation in February 2012 encouraged the Maseeh College of Engineering and Computer Science to create and Equipment Replacement Fund for departmental investments in equipment. The continued growth of the research enterprise at Portland State has contributed to improved research laboratories for students and faculty.

The University Controller’s Office maintains an equipment inventory which serves as an accounting procedure as well as a method of physically tracking assets. This inventory is conducted campus-wide every 2 years for equipment with a minimum value of $5000.

The buildings at Portland State University are equipped with technological systems that support the research activities and services required by the institution’s programs. Portland State University has a small yet highly skilled operations staff which maintains the campus buildings and infrastructure to ensure that the facilities are properly maintained and reliable. The mechanical, electrical, plumbing and building infrastructure systems meet the occupancy requirements for each building.

Portland State University Facilities and Planning uses the AIM software to manage the high volume of work requests for the campus. Work requests typically consist of maintenance/repairs and service requests including; hot/cold calls, custodial, access control, recycling, garbage, graffiti removal and other related services.

Technological Infrastructure

2.G.5
Consistent with its mission, core themes, and characteristics, the institution has appropriate and adequate technology systems and infrastructure to support its management and operational functions, academic programs, and support services, wherever offered and however delivered.
At Portland State University, the Office of Information Technologies (OIT), within the Office of Finance and Administration, provides core infrastructure and technology in administrative and academic support of the mission and guiding themes of the university. OIT hosts and maintains the enterprise Banner ERP system, which includes admissions, registration, financial aid, accounts receivable, human resources, general ledger and payroll. Additional services include Desire2Learn (the learning management system at Portland State University), Echo 360 (lecture capturing software), Elluminate (virtual meeting and classroom collaborate space) and the Google Apps suite (email, calendar, docs, sites, and groups).

All general access classrooms have fixed classroom technology equipment consisting of a computer, ceiling mounted data projector, document camera, and basic classroom control system. OIT provides information on audio-visual services and also lists computer labs across campus giving location, hours of operation, and contact information.

The Computing Infrastructure Services (CIS) department within the Office of Information Technology is responsible for the computing infrastructure used by faculty, staff, and students campus-wide. The campus network is segmented from the residential network thereby reducing the risk of virus attacks. OIT has deployed extensive security measures to protect Portland State University information resources and systems. This extensive wireless network provides students access to library resources from across the campus and the high-speed connections enable quick retrieval of information from the datacenter. Faculty, staff, and students are each provided 1.2Gbps of internet bandwidth. All enterprise software applications used across campus are current and supported.

2.G.6
The institution provides appropriate instruction and support for faculty, staff, students, and administrators in the effective use of technology and technology systems related to its programs, services, and institutional operations.

Academic Research and Computing (ARC) provides support to faculty, staff, and graduate students on a wide variety of topics including programming, web based programming, UNIX and other OS support, statistical consulting, systems integration and instrumentation, and application support for mission related applications such as LabView, Reflection X, SPSS, and SAS. The ARC also offers a broad range of software and computer applications for research purposes.

A number of workshops and training sessions are offered throughout the academic year by OIT and are available to Portland State University faculty, staff, and students at no cost. Registration for these workshops is efficient with online registration, instant email confirmation upon registration, status updates, and a class counter that shows availability. Instructors are able to quickly contact the class list about reminders or workshop updates. OIT uses a trouble ticketing system for reporting problems, which enables the timely response and resolution to technological issues affecting the faculty, staff and students.

All general access classrooms are connected via the Portland State University network to Extron Global Viewer. This allows the OIT-Instructional Technology Services Staff to monitor the use of
classroom technology at Portland State University and intervene to resolve technological issues if they arise. Portland State University computer lab locations and hours of operation are maintained by OIT.

OIT-ITS has implemented the ECHO360 lecture capture system at 10 locations across campus. Portland State University has been using the ECHO360 personal capture software to allow faculty to create presentations to add to the campus learning management system.

2.G.7
Technological infrastructure planning provides opportunities for input from its technology support staff and constituencies who rely on technology for institutional operations, programs, and services.

Portland State University provides multiple opportunities for input from across campus regarding technology infrastructure planning and allows for feedback and suggestions from technology support staff. One active group is the Technology Administrators Group (TAG) which provides a forum for IT professionals on campus to meet with their peers and discuss issues, be updated on campus IT initiatives, and to provide an arena where members can explain or discuss issues they are encountering.

The Advisory Committee on Academic Information Technologies (ACAIT) is an administrative committee of the Faculty Senate established to advise the Provost, the Vice President for Finance and Administration, and the Council of Academic Deans on the academic use of information technologies. Recently, the committee reviewed learning management systems and recommended the adoption of Desire to Learn (D2L), which was launched in 2011. The committee then turned to research computing and examined the resources and policies that will be necessary to support the university’s goal of reaching $100 million in total research expenditures. During the current 2011-2012 academic year, ACAIT is working in conjunction with Research and Strategic Partnerships to evaluate electronic research administration (ERA) packages in order to create pre- and post-award efficiencies.

Information Technology Advisory Committee (ITAC) is appointed by the president to provide the CIO of the university with timely input on the Information Technology plan, policies, and project portfolio. The committee also recommends and communicates priorities, commitments, and expectations to ensure IT projects are completed.

Administrative Priorities Committee (APC) is comprised of a cross campus mix of Banner experts that monitor the use of Banner and make recommendations regarding upgrades, integrations with other software systems, and modifications.

Google Guides is a team that works to support the Google application by recommending help articles, answering questions, and providing training options.

2.G.8
The institution develops, implements, and reviews regularly a technology update and replacement plan to ensure its technological infrastructure is adequate to support its operations, programs, and services.
The Chief Information Officer establishes annual goals with input from TAGs, ACAIT, APC and ITAC. The Office of Information Technologies produces an annual Achievement Report which also lists the new services available to the institution and documents the range of projects completed by OIT staff in the previous year. This report demonstrates the institutional wide impact that OIT has on the campus and acknowledges collaborative activities that OIT has with the campus community.

A key role that ACAIT plays at the institution is generating an academic technology plan. This plan addresses the campus technology strategy and academic trends, but also provides recommendations on acquiring and implementing specific technologies that will meet clearly identified needs and objectives. This plan encourages thoughtful investments in technology and the use of the university’s resources most effectively. Although the plan is about technology growth, it also addresses how technology serves institutional values, personal values and the synergy or interference between these. The purpose of the report is to provide the Provost, the Vice President for Finance and Administration, the Chief Information Officer (CIO), other campus decision-makers, and other interested parties with a guide for making decisions about information technology policies, practices, and resource allocations essential to the realization of PSU’s fundamental mission and objectives.

Conclusion
As demonstrated by the Year Three Report, Portland State has the appropriate independent governance structure to fulfill its mission and adequately support the institution’s core themes and objectives. The institution, led by the President and his executive team, consider a diverse variety of inputs as they plan for the future of the University. As the educational landscape changes in Oregon and the region, Portland State University is continually updating its policies and procedures to address these variations and ensure a quality learning environment. These changes are evident in the growth of pedagogical changes, what does it mean to have a Portland State University degree, educational support, student services, the expansion of the physical environment of the campus, and improved efficiencies of informational and technological processes to improve student access at Portland State University. Together the governance and educational resources at Portland State University support the institutional vision and direction.
Let Knowledge Serve the City

VISION
Our vision is to be an internationally recognized urban university known for excellence in student learning, innovative research, and community engagement that contributes to the economic vitality, environmental sustainability, and quality of life in the Portland region and beyond.

MISSION
The mission of Portland State University is to enhance the intellectual, social, cultural, and economic qualities of urban life by providing access throughout the life span to a quality liberal education for undergraduates and an appropriate array of professional and graduate programs especially relevant to metropolitan areas. The University conducts research and community service that support a high quality educational environment and reflect issues important to the region. It actively promotes the development of a network of educational institutions to serve the community.

VALUES
The pursuit of our vision rests on our success in transforming undergraduate education, growing research programs, strong collaboration with the community, and the core values we hold. These values describe not only what PSU is now, but what it will be in the future.

- LEARNING AND DISCOVERY — PSU values intellectual inquiry in its undergraduate and graduate programs, provides leadership in the development of knowledge, and creates opportunities for the application of knowledge to real-world problems. We maintain a welcoming and stimulating environment that is conducive to success for students, faculty, and staff. We value tenure as an essential component of this environment.

- ACCESS TO LEARNING — PSU is committed to providing access and opportunity to learners from regional, national, and international communities in their pursuit of lifelong learning and diverse educational goals.
- A CLIMATE OF MUTUAL RESPECT — PSU values diversity and fosters a climate of mutual respect and reflection that supports different beliefs and points of view, and the open exchange of ideas.

- OPENNESS AND REFLECTION — PSU endeavors to improve continuously as a university through reflection and open assessment of our activities.

- COMMUNITY AND CIVIC ENGAGEMENT — PSU values its identity as an engaged university that promotes a reciprocal relationship between the community and the University in which knowledge serves the city and the city contributes to knowledge in the University.

We value our partnerships with other institutions, professional groups, the business community, and community organizations, along with the talents and expertise these partnerships bring to the University. We embrace our role as a responsible citizen of the city, the state, the region, and the global community. We foster actions, programs, and scholarship that will lead to a sustainable future.

**GUIDING THEMES**

**LEADING THROUGH ENGAGEMENT**

Engagement describes Portland State’s collaborative approach to the exchange of knowledge and resources with local, regional, national, and global partners for mutual benefit of students, faculty, and the community. Engagement among faculty, students, and the community contributes to learning and scholarship that is globally relevant and regionally focused.

Guiding Themes

The work of the University is guided by the following five themes:

**PROVIDE CIVIC LEADERSHIP THROUGH PARTNERSHIPS**

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.

**IMPROVE STUDENT SUCCESS**

Ensure a student experience that results in higher satisfaction, retention, and graduation rates.

**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 a diverse and global economy.

**ENHANCE EDUCATIONAL OPPORTUNITY**

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

**EXPAND RESOURCES AND IMPROVE EFFECTIVENESS**

Expand resources in each of the funding streams (state, private, business partnerships, research, tuition), manage resources effectively, and match investments to strategic priorities.
Provide Civic Leadership Through Partnerships

1. Enhance PSU’s central role as economic development partner

**ACTIONS**
- Establish roles, structure and year-one goals for VP for Research and Strategic Partnerships (VPRSP)
- Expand collaboration with PDC, TriMet, Greenlight Greater Portland, and other organizations
- Develop and implement strategic economic development partnerships with PGE, NW Natural, Portland Economic Development Clusters (clean-tech/sustainable industries, active wear, software, advance manufacturing), and other organizations

**OUTCOMES – June 2011**
- Role and structure of the strategic partnership function in the Office of the VPRSP defined and staffed, and integrated with the community and university
- Contract with PDC for Data Commons signed
- Center for Applied Economic Analysis operational
- Curriculum and research priorities aligned with economic development goals

2. Enhance PSU’s role and visibility as a civic partner

**ACTIONS**
- Develop collaborative partnerships with civic, cultural, and community organizations such as PAM, OHS, Urban League, and other higher education institutions
- Expand participation in mayoral cabinets and strategic taskforces
- Establish Office of the VPRSP as a primary coordinating access point for major partnerships
- Develop narrative and appropriate assessment measures for the student learning goal on "engagement"

**OUTCOMES – June 2011**
- Additional collaborative activities with new partners; e.g., P-20 initiative with public schools expanded; campus partnerships with Head Start and community college partners for Gateway Center expanded; and to-be-determined projects initiated with others
- Recognition as essential partner with City and others
- VPRSP to have met with key strategic partners in civic and business communities
- Report made to Faculty Senate on the narrative and appropriate assessment measures for the “engagement” learning outcome
- 2011 targets for increased enrollment in community-based learning courses met

3. Enhance collaboration with OHSU and other health care providers

**ACTIONS**
- Complete work of OHSU-PSU Strategic Partnership Task Force
- Establish year-one goals for administrative, research and academic collaborations with OHSU based on the recommendations of the OHSU-PSU Strategic Partnership Task Force
- Develop business plan and launch of design of Life Sciences Collaborative Complex
- Develop bioscience capacity at PSU Business Accelerator

**OUTCOMES – June 2011**
- Report to legislature on outcomes of OHSU-PSU Strategic Partnership Task Force
- Year-one goals for OHSU-PSU Collaborative implemented, including seeking legislation in support of a collaborative school of public health and allied health programs
- Life Sciences Center construction started
Companies utilizing bioscience facilities and programs at the PSU Accelerator

**Improve Student Success**

1. Implement measures to increase student retention and graduation rates

**ACTIONS**

- Implement First Steps Committee’s and other retention recommendations approved by Provost Koch
- Expand plan to increase percentage of tenure-track faculty/strategic conversion of adjunct and fixed term lines to tenure-track lines
- Analyze Smith Memorial Student Union usage patterns

**OUTCOMES - June 2011**

- Meet or exceed 2011 targets for student retention including improve fulltime freshmen to sophomore retention rate (target: 72.5%) and improve junior transfer student retention to second year (target: 83.7%)
- Recruitment approved for new tenure-related lines
- Plan for prioritizing use of Smith Memorial Student Union developed

2. Integrate the new campus-wide undergraduate learning outcomes within learning assessment activities

**ACTIONS**

- Refine online unit level assessment and provide feedback
- Complete Institutional Assessment Council narrative and recommend appropriate assessment measures for each undergraduate learning goal; present work to Faculty Senate
- Map unit-level learning goals to campus-wide undergraduate learning outcomes and organize and convene faculty discussions on unit-level coverage
- Develop and begin implementing a campus-wide undergraduate learning outcomes communication plan for students and community

**OUTCOMES - June 2011**

- Annual online assessment cycle on schedule for 2011-12 academic year
- Narrative and appropriate measures for each undergraduate learning goal reported to the Faculty Senate
- Plan to address campus-wide undergraduate learning outcomes at unit level developed; unit role in assessment of campus-wide undergraduate learning outcomes articulated
- Plan developed and implemented for communicating campus-wide undergraduate learning outcomes to students and community

3. Improve academic success of athletes

**ACTIONS**

- Host successful NCAA campus certification visit in Fall 2010
- Adopt and implement new advising plan for student athletes to include community engagement requirement
- Include academic performance of athletes as a measure in annual performance evaluation of coaches and staff

**OUTCOMES - June 2011**

- Changes to athletics program implemented
- Ban lifted on post-season play for the following year and no further penalties imposed
- 100% participation in and completion of community engagement requirements achieved by athletes
- 925 APR in all sports maintained or exceeded

**Achieve Global Excellence**

1. Expand innovative research

**ACTIONS**

- Establish a plan for research that sets expectations for growth in total funding, increased research dollars per FTE, and meets goal of doubling external funding in five years
- Improve research infrastructure by addressing research compliance, incentives, staffing, use of digital repository, creation of electronic proposal and submission system, enhanced research seed funding, streamlined research support processes
- Develop targeted plan for international research partnerships

**OUTCOMES - June 2011**

- 2011 targets for external funding $64 million and increased industry startups/intellectual property management met
- Quality initiatives in areas of research infrastructure implemented
- First-year plan for international research partnerships implemented

2. Establish PSU as a recognized regional resource for research, practice and education in sustainability

**ACTIONS**

- Develop one-year and five-year organizational plans with sustainability director and establish a communications plan for Institute for Sustainable Solutions
- Increase visibility regionally and nationally of PSU’s role in sustainability research
- Create definition of sustainability-related courses and set target for increasing enrollment
- Participate in development of Oregon Sustainability Center
> Establish sustainable policies and practices for campus operations

**OUTCOMES - June 2011**

> Year-one communication plan for Institute for Sustainable Solutions implemented
> Report submitted to Provost and VPRSP on increased visibility of sustainability-related research
> Report submitted to Provost and VPRSP on definition/descriptions and targets for sustainability-related research, courses and enrollment
> Role for PSU in Oregon Sustainability Center contractually defined
> Sustainable policies and practices for campus operations implemented

3. Pursue diversity goals for students, faculty, and staff

**ACTIONS**

> Establish Chief Diversity Officer as an influential campus-wide leader
> Complete updated strategic diversity action plan
> Implement recommendations of Latino-Latina Student Success Task Force
> Identify opportunities to promote success for under-represented students, faculty and staff

**OUTCOMES - June 2011**

> Office of Chief Diversity Officer perceived by campus community as integral on diversity issues
> Strategic diversity action plan ready for implementation
> Interim Latina/Latino Center for Student Success established
> Plan for maximizing opportunities for under-represented students, faculty and staff completed

4. Pursue internationalization goals recommended by the Internationalization Council

**ACTIONS**

> Review, approve and begin implementing selected strategies outlined in Strategy for Comprehensive Internationalization
> Coordinate Middle East initiative, including hiring in-region specialist and plans for recruitment and alumni relations and academic programs
> Develop additional strategic international partnerships in selected universities in Asia, Middle East and Latin America

**OUTCOMES - June 2011**

> Strategy for Comprehensive Internationalization approved by Chief Diversity Officer, Council of Academic Deans, Provost, and President
> 2011 target for increasing international enrollment (2,000 students) met or exceeded
> Terms and conditions for strategic international partnerships and, when appropriate, partnership agreements implemented

Enhance Educational Opportunity

1. Work with K-12 partners in the Portland metropolitan area to improve student success

**ACTIONS**

> Enhance leadership role in establishing P-20 Cradle to Career initiative
> Work with faculty and community partners to identify strategic areas for research focus
> Implement College Readiness Program in partnering with regional school districts and develop a Math-Science Partnership proposal for submission to National Science Foundation (NSF)

**OUTCOMES - June 2011**

> Data collection and analysis systems developed for Multnomah County-P-20 Cradle to Career initiative
> P-20 Cradle to Career focus areas identified and research groups formed
> Math-Science Partnership proposal submitted to NSF

2. Expand and improve Portland State online programming for students and faculty

**ACTIONS**

> Migrate online courses from Blackboard to Desire2Learn
> Establish administrative structure for online learning and hire a director
> Expand the number of fully online and hybrid courses (including University Studies’ SINQs)
> Focus on enhancing appropriate support activities (Library, HELP desk, instructional design, IT infrastructure, LMS) by coordinating efforts through new online learning center

**OUTCOMES - June 2011**

> Existing online courses successfully converted to Desire2Learn
> Online learning administrative structure, budget model, policies and administrative infrastructure operational
> Fifteen percent of SINQs available in an online format; capacity to offer seven full online SINQs and three full online capstone classes each quarter
> Online learning director in place and coordinating support activities
Expand Resources And Improve Effectiveness

1. Undertake a long-term strategic financial planning effort

ACTIONS

> Financial Futures Task Force to develop long term financial planning and budget model that aligns budget model principles with strategic University goals
> Develop tuition strategy, examine fee remission strategy, and other revenue topics
> Explore feasibility of business service centers as means to improve the quality of key administrative functions

OUTCOMES - June 2011

> Financial Futures Task Force work completed and principles for a new budget model established
> Recommendations on tuition strategy, fee remission strategy, and other pertinent review topics submitted to ExCom
> Pilot business service center operational and recommendations on future of service center approach submitted to ExCom

2. Develop enrollment management plan and begin implementation

ACTIONS

> Formalize enrollment management plan, including fee remission and scholarships to support recruitment, retention, and graduation
> Strategically recruit domestic, high-achieving, and non-resident and international students
> Strengthen community college connections
> Plan and implement steps to expand student housing
> Establish fundraising case in support of the enrollment plan, diversity, and student success

OUTCOMES - June 2011

> Campus enrollment management plan, including strategic allocation of fee remissions and scholarships, implemented
> 2011 target for domestic non-resident (4,028) and international students (2,000) met or exceeded
> Complete infrastructure and technology to support co-admission
> College Station Housing Project in construction
> Fundraising plan in support of the enrollment plan, diversity, and student success implemented

3. Enhance curricular efficiency and effectiveness

ACTIONS

> Identify appropriate courses and necessary instructional support for offering large lecture sections
> Develop and implement a plan for managing capacity through enhanced course scheduling and effective classroom usage
> Expand online offerings
> Focus on appropriate faculty mix (appointment type, address diversity goals)

OUTCOMES - June 2011

> Plan established for identifying courses and instructional support needed for offering more large lecture sections
> Number of small classes that do not meet the minimum enrollment policy reduced
> Implementation begun of plan for more effective classroom management and scheduling
> Target for increasing the number of online courses (847) and the SCH in online courses (74,052) met
> Searches for 15 new tenure-related positions concluded

4. Build a culture of philanthropy, prepare for a major comprehensive campaign and define campaign priorities

ACTIONS

> Implement a Moves Management System and increase major gift and grant proposal activities
> Create or improve predictive modeling, prospect research and targeted alumni relations activities to grow PSU donor base and extend the major gifts pipeline
> Integrate the need for support in the communications plan and activities
> Assess the need for endowed/expendable and outright/deferred gift funding to be included in the capital plan
> Conduct campaign feasibility study and develop initial case statement based on defined and vetted campaign priorities

OUTCOMES - June 2011

> Expanded donor base created
> Fundraising strategy for capital projects developed
> Corporate and foundation proposals and awards increased
> Campaign feasibility study and initial case statements completed
> Collaboration between University Relations and University divisions improved
5. Improve campus climate

**ACTIONS**

- Fully integrate new Executive Committee members into the campus community and senior management
- Ensure regular communication with campus community regarding goals, activities, and challenges
- Employ continuous improvement program to address infrastructure challenges
- Convene working groups to create additional opportunities to support and recognize the achievements of faculty and staff
- Increase professional development opportunities to foster career development

**OUTCOMES - June 2011**

- Roles of new Executive Committee members clearly defined and group functioning well as a team
- Campus outreach plan developed and implemented
- Report made to ExCom regarding progress toward infrastructure improvements
- Recommendation on ways to better recognize faculty and staff excellence presented to Provost, Human Resources and ExCom
- Career development support plan completed

6. Initiate or continue major capital projects and update current infrastructure

**ACTIONS**

- Continue work on current capital projects including Life Sciences Collaborative Building, Oregon Sustainability Center, College Station Housing Project, Science Building 2 renovation, Lincoln Hall renovation, Market Center Building remodel, Campus Loop Project, Corbett Building, Bioscience Labs
- Work toward approval of capital project list
- FADM to work with OAA and Deans to produce space management plan
- Develop staged implementation plans for campus growth based on new University District Framework and begin to develop PSU EcoDistrict
- Implement Climate Action Plan

**OUTCOMES - June 2011**

- Planned capital projects completed
- Capital projects list approved as feasible by state
- Space management plan completed and approved by vice presidents and provost

> City and neighborhood support for development of EcoDistrict secured and initial stages planned; University District Framework Plan approved by city and PDC, and initial stages implemented

> Major elements of Climate Action Plan implemented

7. Expand PSU’s role in state and local leadership

**ACTIONS**

- Collaborate on changing OUS governance structure and authority
- Expand existing leadership endeavors: Urban Renewal District; Milwaukie Lightrail; Streetcar; PSU/OHSU Life Sciences Collaborative Complex
- Explore new local revenue alternatives to support PSU

**OUTCOMES - June 2011**

- Additional flexibilities in governance secured from 2011 Oregon Legislative Assembly
- PSU regarded as a full partner in key decision-making groups
- Feasibility analysis of new local revenue alternatives completed
### Portland State University

**Mission-Specific Indicators**

#### R&D in Science and Engineering

**Targeted Measure**

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<tbody>
<tr>
<td><strong>Actual</strong></td>
<td>$7.7</td>
<td>$9.9</td>
<td>$11.0</td>
<td>$14.0</td>
<td>$17.2</td>
<td>$14.2</td>
<td>$15.9</td>
<td>$19.4</td>
<td>$22.1</td>
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<tr>
<td><strong>Targets</strong></td>
<td>$7.0</td>
<td>$9.5</td>
<td>$10.0</td>
<td>$10.5</td>
<td></td>
<td>$15.4</td>
<td>$16.5</td>
<td>$17.7</td>
<td>$18.9</td>
<td>$20.0</td>
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*Research and development expenditures in science and engineering ($ in millions)*

*Note: Universities established high and low targets prior to 2008. In 2008, PSU recalibrated near-term targets.*

#### Community-Service Learning

**Targeted Measure**

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</thead>
<tbody>
<tr>
<td><strong>Actual</strong></td>
<td>6,918</td>
<td>7,432</td>
<td>7,789</td>
<td>8,020</td>
<td>8,296</td>
<td>9,437</td>
<td>10,189</td>
<td>11,431</td>
<td>12,255</td>
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<tr>
<td><strong>Targets</strong></td>
<td>7,256</td>
<td>8,194</td>
<td>8,603</td>
<td>9,034</td>
<td>9,675</td>
<td>9,780</td>
<td>9,925</td>
<td>10,125</td>
<td>10,200</td>
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</table>

*Number of students who enrolled in a community-service learning project designed to develop higher-order thinking skills and competencies in the workplace*

*Note: Universities established high and low targets prior to 2008 (for years through 2008-09)*
## Portland State University
Mission Fulfillment Measureable Outcomes Rubric
by Core Theme

### Core Theme: Community Engagement and Civic Leadership

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Needs improvement to achieve threshold</th>
<th>Meets mission fulfilment threshold</th>
<th>Exceeds mission fulfilment threshold</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment in community-based learning courses</td>
<td>Falls below three-year rolling average.</td>
<td>Meets three-year rolling average.</td>
<td>Exceeds three-year rolling average.</td>
</tr>
<tr>
<td>Number of departments assessing Engagement: Campus-Wide Learning Outcome</td>
<td>Number below goal set by CAE.</td>
<td>Number meets annual goals set by CAE.</td>
<td>Number exceeds goals set by CAE.</td>
</tr>
</tbody>
</table>

### Core Theme: Student Success

<table>
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<tr>
<th>Indicators</th>
<th>Needs improvement to achieve threshold</th>
<th>Meets mission fulfilment threshold</th>
<th>Exceeds mission fulfilment threshold</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freshman 6-year graduation rates</td>
<td>Falls below three-year rolling average.</td>
<td>Meets three-year rolling average.</td>
<td>Exceeds three-year rolling average.</td>
</tr>
<tr>
<td>Transfer student 6-year graduation rates</td>
<td>Falls below three-year rolling average.</td>
<td>Meets three-year rolling average.</td>
<td>Exceeds three-year rolling average.</td>
</tr>
<tr>
<td>Co-admit student 6-year graduation rates</td>
<td>Falls below three-year rolling average.</td>
<td>Meets three-year rolling average.</td>
<td>Exceeds three-year rolling average.</td>
</tr>
<tr>
<td>Degrees granted</td>
<td>Falls below three-year rolling average.</td>
<td>Meets three-year rolling average.</td>
<td>Exceeds three-year rolling average.</td>
</tr>
<tr>
<td>Undergraduate degrees</td>
<td></td>
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<tr>
<td>Graduate degrees</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Percentage of departments meeting program assessment expectations</td>
<td>Number of programs moving from &quot;emerging&quot; to &quot;mid-stage&quot; falls below increase of past 3 years.</td>
<td>Number of programs moving from &quot;emerging&quot; to &quot;mid-stage&quot; meets annual target.</td>
<td>Number of programs moving from &quot;mid-stage&quot; to &quot;established&quot; exceeds target.</td>
</tr>
</tbody>
</table>

### Core Theme: Innovative Research and Scholarship

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Needs improvement to achieve threshold</th>
<th>Meets mission fulfilment threshold</th>
<th>Exceeds mission fulfilment threshold</th>
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</thead>
<tbody>
<tr>
<td>Research expenditures</td>
<td>Falls below three-year rolling average.</td>
<td>Meets three-year rolling average.</td>
<td>Exceeds three-year rolling average.</td>
</tr>
<tr>
<td>Number of graduate research assistantships</td>
<td>Falls below three-year rolling average.</td>
<td>Meets three-year rolling average.</td>
<td>Exceeds three-year rolling average.</td>
</tr>
<tr>
<td>Core theme: Educational Opportunity Indicators</td>
<td>Needs improvement to achieve threshold</td>
<td>Meets mission fulfilment threshold</td>
<td>Exceeds mission fulfilment threshold</td>
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<tr>
<td>-----------------------------------------------</td>
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<tr>
<td>Student credit hours in online, weekend/evening, highschool courses</td>
<td>Falls below three-year rolling average.</td>
<td>Meets three-year rolling average.</td>
<td>Exceeds three-year rolling average.</td>
</tr>
<tr>
<td>Oregon resident enrollment within Portland Metro Area</td>
<td>Falls below three-year rolling average.</td>
<td>Meets three-year rolling average.</td>
<td>Exceeds three-year rolling average.</td>
</tr>
<tr>
<td>Oregon resident enrollment from outside Portland Metro Area</td>
<td>Falls below three-year rolling average.</td>
<td>Meets three-year rolling average.</td>
<td>Exceeds three-year rolling average.</td>
</tr>
<tr>
<td>Admission of diverse students</td>
<td>Falls below three-year rolling average.</td>
<td>Meets three-year rolling average.</td>
<td>Exceeds three-year rolling average.</td>
</tr>
<tr>
<td>Enrollment of diverse students Percentage of total enrollment</td>
<td>Falls below three-year rolling average.</td>
<td>Meets three-year rolling average.</td>
<td>Exceeds three-year rolling average.</td>
</tr>
<tr>
<td>Six-year graduation rate for diverse students: Freshmen Transfers</td>
<td>Falls below three-year rolling average.</td>
<td>Meets three-year rolling average.</td>
<td>Exceeds three-year rolling average.</td>
</tr>
<tr>
<td>Degrees awarded to diverse students Undergraduate Graduate</td>
<td>Falls below three-year rolling average.</td>
<td>Meets three-year rolling average.</td>
<td>Exceeds three-year rolling average.</td>
</tr>
<tr>
<td>Enrollment of international students Percentage of total enrollment</td>
<td>Falls below three-year rolling average.</td>
<td>Meets three-year rolling average.</td>
<td>Exceeds three-year rolling average.</td>
</tr>
<tr>
<td>Enrollment of domestic non-residents Percentage of total enrollment</td>
<td>Falls below three-year rolling average.</td>
<td>Meets three-year rolling average.</td>
<td>Exceeds three-year rolling average.</td>
</tr>
<tr>
<td>Enrollment in Education Abroad Percentage of graduating class</td>
<td>Falls below three-year rolling average.</td>
<td>Meets three-year rolling average.</td>
<td>Exceeds three-year rolling average.</td>
</tr>
<tr>
<td>Number of departments assessing Internationalization: Campus-Wide Learning Outcome</td>
<td>Number of programs moving from &quot;emerging&quot; to &quot;mid-stage&quot; falls below increase of past three years.</td>
<td>Number of programs moving from &quot;emerging&quot; to &quot;mid-stage&quot; meets annual target.</td>
<td>Number of programs moving from &quot;mid-stage&quot; to &quot;established&quot; exceeds target.</td>
</tr>
</tbody>
</table>

OIRP: k.k
5.20.11
Exhibits

Year One Report

*Portland State University Bulletin*
*Blueprint for the Future*
*Oregon University System Performance Report*
*Portland State University Fall Term Fact Book*

Year Three Report

**Standard 2.A – Governance**

Portland State University organizational chart
*Faculty Governance Guide*
Portland State University Policy Library
*Oregon University System Achievement Compact*
*Oregon University System Organizational Chart*
*Oregon University System Annual Performance Progress Reports*
*Portland State University Guidelines for Promotion and Tenure*
*Office of Information Technologies policies*
*Financial Conflict of Interest Disclosure*
*Portland State University Foundation Agreement*

**Standard 2.B – Human Resources**

Instructional and Non-Instructional Faculty
*Full-Time Instructional Faculty Highest Degree by Rank and Tenure*
*Full-Time Instructional Faculty by College/School*
*Deadlines for Academic Personnel Actions*
*Annual Performance Review for Academic Administrators*
*Professional Standards of Conduct Policy*
*Code of Ethics*
*Oregon University System: Improve Management of Faculty Workload*
*AAUP Collective Bargaining Agreement*
*AFT Collective Bargaining Agreement*
*Faculty Grievance Procedure*

**Standard 2.C – Education Resources**

*Oregon University System Proposal for Delivery of an Existing Program at a New Location*
*NWCCU - Substantive Change Proposal*
*Curricular Change Instructions*
*Academic Program Review*
*Institutional Assessment Reports*
*Portland State University Schedule of Classes*
*Minimum Admission Requirements: Transfer*
*Transfer Admission*
Academic Program Approval Process: New Graduate Programs
Portland State University Graduate Programs
Portland State University Graduate certificate programs

Standard 2.D – Student Support Services

Portland State University - codes of conduct
Cleary Act
Undergraduate Admissions process
Graduation Requirements
Request for Release of Confidential Information
NCAA 2010 self-study

Standard 2.E – Library and Information Resources

Copyright Policy
Disaster Recovery Plan for Office of Information Technologies
2012-2014 Library Strategic Plan

Standard 2.F – Financial Resources

Oregon University System Fiscal Policy Manual
2010-11 Portland State University - Education and General Resources
2010-11 Portland State University - Non-Education and General Service Revenue
Oregon University System Annual Report
Portland State University minimum enrollment policy
University Planning document
Long Term Institutional Fiscal Strategies Reports
The Impact of Giving to Portland State University
Financial Futures Taskforce Report
Auxiliary Services Operating Budget
2011 Oregon University System auditor's report

Standard 2.G – Physical and Technological Infrastructure

Portland State University: University District Framework Plan
Chemical Hygiene Plan
Hazard Communication Plan
Radiation Safety Program Guide
Office of Information Technologies security measures
Office of Information Technologies Achievement Report
Information and data provided in the institutional self-evaluation are usually for the academic and fiscal year preceding the year of the evaluation committee visit. The purpose of this form is to provide Commissioners and evaluators with current data for the year of the visit. After the self-evaluation report has been finalized, complete this form to ensure the information is current for the time of the evaluation committee visit. Please provide a completed copy of this form with each copy of the self-evaluation report sent to the Commission office and to each evaluator.

To enable consistency of reporting, please refer to the glossary in the 2003 Accreditation Handbook for definitions of terms.

Institution: Portland State University

Address: P.O. Box 751

City, State, ZIP: Portland, OR 97207

Degree Levels Offered: Doctorate, Masters, Baccalaureate, Associate, Other

If part of a multi-institutional system, name of system: Oregon University System

Type of Institution: Comprehensive, Specialized, Health-centered, Religious-based, Native/Tribal, Other (specify)

Institutional control: Public, City, County, State, Federal, Tribal, Private/Independent (Non-profit, For Profit)

Institutional calendar: Quarter, Semester, Trimester, 4-1-4, Continuous Term, Other (specify)

Specialized/Programmatic accreditation: List program or school, degree level(s) and date of last accreditation by an agency recognized by the United States Department of Education. (Add additional pages if necessary.)

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<tr>
<th>Program or School</th>
<th>Degree Level(s)</th>
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Revised February 2011
**Full-Time Equivalent (FTE) Enrollment** (Formula used to compute FTE: undergraduate students / 15 credits / term; graduate master students / 12 credits / term; graduate Ph.D. students / 9 credits / term)

Official Fall 2011 (most recent year) FTE Student Enrollments

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**Full-Time Unduplicated Headcount Enrollment.** (Count students enrolled in credit courses only.)

Official Fall 2011 (most recent year) Student Headcount Enrollments

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**Numbers of Full-Time and Part-Time Instructional and Research Faculty & Staff and Numbers of Full-Time (only) Instructional and Research Faculty & Staff by Highest Degree Earned.** Include only professional personnel who are primarily assigned to instruction or research.

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<th>Part Time</th>
<th>Unknown /Not reported</th>
<th>Less than Associate</th>
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<th>Bachelor</th>
<th>Masters</th>
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**Mean Salaries and Mean Years of Service of Full-Time Instructional and Research Faculty and Staff.** Include only full-time personnel with professional status who are primarily assigned to instruction or research.

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<th>Rank</th>
<th>Mean Salary *</th>
<th>Mean Years of Service</th>
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* All salaries converted to 9 month equivalents
Financial Information. Complete each item in the report using zero where there is nothing to report. Enter figures to the nearest dollar. Auxiliary and service enterprises of the institution (housing, food service, book stores, athletics, etc.) should be included. The institution’s audit materials should be an excellent reference for completing the report.

Fiscal year of the institution: See attached: 2009-2011 Financial information

Reporting of income: Accrual Basis
Reporting of expenses: Accrual Basis

## Balance Sheet Data

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<th>ASSETS</th>
<th>Last Completed FY Dates:</th>
<th>One Year Prior to Last Completed FY Dates:</th>
<th>Two Years Prior to Last Completed FY Dates:</th>
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<td>Cash</td>
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<td>Investments</td>
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<td><strong>Endowment and Similar Funds</strong></td>
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<td>Cash</td>
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<td>Due from</td>
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<td><strong>Total Unexpended</strong></td>
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*Balance Sheet Data (continued)*
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### Current Funds, Revenues, Expenditures, and Other Changes

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</tr>
<tr>
<td>State appropriations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local appropriations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grants and contracts</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Endowment income</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Auxiliary enterprises</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other (identify)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Expenditure & Mandatory Transfers

#### Educational and General
- Instruction
- Research
- Public services
- Academic support
- Student services
- Institutional support
- Operation and maintenance of plant
- Scholarships and fellowships
- Other (identify)

#### Mandatory transfers for:
- Principal and interest
- Renewal and replacements
- Loan fund matching grants
- Other (identify)

#### Total Educational and General

#### Auxiliary Enterprises
- Expenditures
- Mandatory transfers for:
  - Principal and interest
  - Renewals and replacements

#### Total Auxiliary Enterprises

#### Total Expenditure & Mandatory Transfers

#### Other Transfers and Additions/Deletions (identify)

**Excess** [deficiency of revenues over expenditures and mandatory transfers (net change in fund balances)]

### Institutional Indebtedness

<table>
<thead>
<tr>
<th>Total Debt to Outside Parties</th>
<th>Last Completed FY Dates:</th>
<th>One Year Prior to Last Completed FY Dates:</th>
<th>Two Years Prior to Last Completed FY Dates:</th>
</tr>
</thead>
<tbody>
<tr>
<td>For Capital Outlay</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>For Operations</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

113
Domestic Off-Campus Degree Programs and Academic Credit Sites: Report information for off-campus sites within the United States where degree programs and academic coursework is offered. (Add additional pages if necessary.)

**Degree Programs** – list the names of degree programs that can be completed at the site.
**Academic Credit Courses** – report the total number of academic credit courses offered at the site.
**Student Headcount** – report the total number (unduplicated headcount) of students currently enrolled in programs at the site.
**Faculty Headcount** – report the total number (unduplicated headcount) of faculty (full-time and part-time) teaching at the site.

**Programs and Academic Credit Offered at Off-Campus Sites Within the United States**

<table>
<thead>
<tr>
<th>Location of Site</th>
<th>Degree Programs</th>
<th>Academic Credit Courses</th>
<th>Student Headcount</th>
<th>Faculty Headcount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>City, State, ZIP</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

See attached.
**Programs and Academic Courses Offered at Sites Outside the United States.** Report information for sites outside the United States where degree programs and academic credit courses are offered, including study abroad programs and educational operations on military bases. (Add additional pages if necessary.)

**Degree Programs** – list the names of degree programs that can be completed at the site.

**Academic Credit Courses** – report the total number of academic credit courses offered at the site.

**Student Headcount** – report the total number (unduplicated headcount) of students currently enrolled in programs at the site.

**Faculty Headcount** – report the total number (unduplicated headcount) of faculty (full-time and part-time) teaching at the site.

<table>
<thead>
<tr>
<th>Location of Site Name</th>
<th>Degree Programs</th>
<th>Academic Credit Courses</th>
<th>Student Headcount</th>
<th>Faculty Headcount</th>
</tr>
</thead>
<tbody>
<tr>
<td>International Institute for Information Science and Technology No. 429, Zhanghen Rd. Shanghai, People’s Republic of China</td>
<td>Bachelor of Science in Science</td>
<td>12</td>
<td>40</td>
<td>6</td>
</tr>
</tbody>
</table>

See Attached for Study Abroad Programs
## Consolidating Statement of Net Assets

### As of June 30, 2011

<table>
<thead>
<tr>
<th>Assets</th>
<th>Eastern Oregon University</th>
<th>Oregon Institute of Technology</th>
<th>Oregon State University</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current Assets</strong></td>
<td>$8,217</td>
<td>$12,868</td>
<td>$155,758</td>
<td></td>
</tr>
<tr>
<td>Cash and Cash Equivalents</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>Receivables from Students</td>
<td>6,945</td>
<td>2,622</td>
<td>76,604</td>
<td></td>
</tr>
<tr>
<td>Inventories</td>
<td>529</td>
<td>451</td>
<td>1,000</td>
<td></td>
</tr>
<tr>
<td>Prepaid Expenses</td>
<td>6</td>
<td>192</td>
<td>1,254</td>
<td></td>
</tr>
<tr>
<td><strong>Total Current Assets</strong></td>
<td>$13,877</td>
<td>$17,999</td>
<td>$250,139</td>
<td></td>
</tr>
<tr>
<td><strong>Noncurrent Assets</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash and Cash Equivalents</td>
<td>11,946</td>
<td>5,174</td>
<td>138,619</td>
<td></td>
</tr>
<tr>
<td>Investments</td>
<td>2,921</td>
<td>254</td>
<td>35,153</td>
<td></td>
</tr>
<tr>
<td>Notes Receivable</td>
<td>2,271</td>
<td>2,358</td>
<td>20,884</td>
<td></td>
</tr>
<tr>
<td>Due from Other OUS Funds and Entities</td>
<td>-</td>
<td>-</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>Capital Assets, Net of Accumulated Depreciation</td>
<td>37,798</td>
<td>69,996</td>
<td>717,131</td>
<td></td>
</tr>
<tr>
<td><strong>Total Noncurrent Assets</strong></td>
<td>$73,134</td>
<td>$77,609</td>
<td>$896,981</td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL ASSETS** | $86,741 | $94,508 | $1,147,120 |

### Liabilities

<table>
<thead>
<tr>
<th>Liabilities</th>
<th>Eastern Oregon University</th>
<th>Oregon Institute of Technology</th>
<th>Oregon State University</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current Liabilities</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounts Payable and Accrued Liabilities</td>
<td>$1,707</td>
<td>$2,149</td>
<td>$44,962</td>
<td></td>
</tr>
<tr>
<td>Deposits</td>
<td>641</td>
<td>287</td>
<td>4,726</td>
<td></td>
</tr>
<tr>
<td>Obligations Under Securities Lending</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>Current Portion of Long-Term Liabilities</td>
<td>1,888</td>
<td>1,329</td>
<td>23,124</td>
<td></td>
</tr>
<tr>
<td>Deferred Revenue</td>
<td>1,913</td>
<td>1,871</td>
<td>26,983</td>
<td></td>
</tr>
<tr>
<td><strong>Total Current Liabilities</strong></td>
<td>$4,819</td>
<td>$5,326</td>
<td>$109,795</td>
<td></td>
</tr>
<tr>
<td><strong>Noncurrent Liabilities</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Long-Term Liabilities</td>
<td>46,046</td>
<td>52,156</td>
<td>269,640</td>
<td></td>
</tr>
<tr>
<td>Due in Other OUS Funds and Entities</td>
<td>15,131</td>
<td>27,922</td>
<td>266,017</td>
<td></td>
</tr>
<tr>
<td><strong>Total Noncurrent Liabilities</strong></td>
<td>$61,177</td>
<td>$79,078</td>
<td>$535,657</td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL LIABILITIES** | $65,995 | $84,394 | $631,022 |

### Net Assets

<table>
<thead>
<tr>
<th>Net Assets</th>
<th>Eastern Oregon University</th>
<th>Oregon Institute of Technology</th>
<th>Oregon State University</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invested in Capital Assets, Net of Related Debt</td>
<td>$10,210</td>
<td>$17,520</td>
<td>$303,123</td>
<td></td>
</tr>
<tr>
<td>Restricted Fund</td>
<td>584</td>
<td>3,233</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nonexpendable Endowments</td>
<td>1,274</td>
<td>837</td>
<td>41,671</td>
<td></td>
</tr>
<tr>
<td>Expendable:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gifts, Grants, and Contracts</td>
<td>1,670</td>
<td>3,473</td>
<td>30,494</td>
<td></td>
</tr>
<tr>
<td>Student Loans</td>
<td>784</td>
<td>306</td>
<td>50,881</td>
<td></td>
</tr>
<tr>
<td>Capital Projects</td>
<td>17</td>
<td>23</td>
<td>200</td>
<td></td>
</tr>
<tr>
<td>Debt Service</td>
<td>6,687</td>
<td>9,205</td>
<td>116,466</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL NET ASSETS</strong></td>
<td>$23,294</td>
<td>$31,064</td>
<td>$391,068</td>
<td></td>
</tr>
</tbody>
</table>
## Supplementary Schedules

### Consolidating Statement of Revenues, Expenses, and Changes in Net Assets:

**For The Year Ended June 30, 2011**

<table>
<thead>
<tr>
<th></th>
<th>Eastern Oregon University</th>
<th>Oregon Institute of Technology</th>
<th>Oregon State University</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Operating Revenues</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student Tuition and Fees, Net</td>
<td>$14,905</td>
<td>$14,582</td>
<td>$180,759</td>
</tr>
<tr>
<td>Federal Grants and Contracts</td>
<td>2,107</td>
<td>3,965</td>
<td>163,401</td>
</tr>
<tr>
<td>State and Local Grants and Contracts</td>
<td>941</td>
<td>201</td>
<td>5,173</td>
</tr>
<tr>
<td>Nongovernmental Grants and Contracts</td>
<td>60</td>
<td>2,843</td>
<td>20,456</td>
</tr>
<tr>
<td>Educational Department Sales and Services</td>
<td>344</td>
<td>557</td>
<td>78,699</td>
</tr>
<tr>
<td>Auxiliary Enterprises Revenues, Net</td>
<td>7,030</td>
<td>7,903</td>
<td>103,795</td>
</tr>
<tr>
<td>Other Operating Revenues</td>
<td>851</td>
<td>716</td>
<td>5,027</td>
</tr>
<tr>
<td><strong>Total Operating Revenues</strong></td>
<td>$25,758</td>
<td>$28,470</td>
<td>$307,130</td>
</tr>
<tr>
<td><strong>Operating Expenses</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Instruction</td>
<td>16,047</td>
<td>21,556</td>
<td>711,554</td>
</tr>
<tr>
<td>Research</td>
<td>344</td>
<td>319</td>
<td>167,352</td>
</tr>
<tr>
<td>Public Service</td>
<td>3,673</td>
<td>2,656</td>
<td>80,307</td>
</tr>
<tr>
<td>Academic Support</td>
<td>5,712</td>
<td>4,747</td>
<td>46,846</td>
</tr>
<tr>
<td>Student Services</td>
<td>2,423</td>
<td>2,384</td>
<td>21,876</td>
</tr>
<tr>
<td>Auxiliary Programs</td>
<td>8,103</td>
<td>10,339</td>
<td>109,035</td>
</tr>
<tr>
<td>Institutional Support</td>
<td>5,492</td>
<td>4,773</td>
<td>50,113</td>
</tr>
<tr>
<td>Operation and Maintenance of Plant</td>
<td>2,945</td>
<td>3,074</td>
<td>76,846</td>
</tr>
<tr>
<td>Student Aid</td>
<td>5,203</td>
<td>4,378</td>
<td>26,484</td>
</tr>
<tr>
<td>Other Operating Expenses</td>
<td>3,303</td>
<td>2,785</td>
<td>35,027</td>
</tr>
<tr>
<td><strong>Total Operating Expenses</strong></td>
<td>$51,444</td>
<td>$37,015</td>
<td>$751,442</td>
</tr>
</tbody>
</table>

### Operating Loss

|                                   | ($25,716) | ($28,431) | ($228,332) |

### Nonoperating Revenues (Expenses)

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Governmental Appropriations</td>
<td>16,759</td>
<td>19,714</td>
<td>167,277</td>
</tr>
<tr>
<td>Grants</td>
<td>8,721</td>
<td>6,161</td>
<td>36,828</td>
</tr>
<tr>
<td>Investment Activity</td>
<td>271</td>
<td>65</td>
<td>12,545</td>
</tr>
<tr>
<td>(Loss) Gain on Sale of Assets, Net</td>
<td>(1)</td>
<td>(444)</td>
<td>78,024</td>
</tr>
<tr>
<td>Interest Expense</td>
<td>(2,520)</td>
<td>(2,951)</td>
<td>(21,670)</td>
</tr>
<tr>
<td>Other Nonoperating Items</td>
<td>70</td>
<td>3,938</td>
<td>37,692</td>
</tr>
<tr>
<td><strong>Net Nonoperating Revenues</strong></td>
<td>$23,965</td>
<td>$23,487</td>
<td>$233,214</td>
</tr>
<tr>
<td><strong>Income (Loss) Before Other Nonoperating Revenues</strong></td>
<td>($2,431)</td>
<td>($3,034)</td>
<td>4,982</td>
</tr>
<tr>
<td>Capital and Debt Service Appropriations</td>
<td>2,621</td>
<td>1,618</td>
<td>11,437</td>
</tr>
<tr>
<td>Capital Grants and Gifts</td>
<td>75</td>
<td>97</td>
<td>7,976</td>
</tr>
<tr>
<td>Transfers within OUS</td>
<td>815</td>
<td>418</td>
<td>2,027</td>
</tr>
<tr>
<td><strong>Total Other Nonoperating Revenues</strong></td>
<td>3,436</td>
<td>2,311</td>
<td>13,290</td>
</tr>
<tr>
<td><strong>Increase (Decrease) in Net Assets</strong></td>
<td>1,033</td>
<td>(943)</td>
<td>21,172</td>
</tr>
</tbody>
</table>

### NET ASSETS

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Beginning Balance</td>
<td>20,889</td>
<td>32,307</td>
<td>502,896</td>
</tr>
<tr>
<td>Ending Balance</td>
<td>$22,906</td>
<td>$31,364</td>
<td>$533,368</td>
</tr>
</tbody>
</table>

### Portland State University

<table>
<thead>
<tr>
<th>Portland State University</th>
<th>Southern University of Oregon</th>
<th>University of Oregon</th>
<th>University of Oregon</th>
<th>Western Oregon University</th>
<th>Chancellor’s Office</th>
<th>Eliminations</th>
<th>Total OUS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$719,852</td>
</tr>
<tr>
<td></td>
<td>$171,212</td>
<td>$24,942</td>
<td>$281,187</td>
<td>$28,665</td>
<td></td>
<td></td>
<td>$335,573</td>
</tr>
<tr>
<td></td>
<td>51,793</td>
<td>2,405</td>
<td>105,453</td>
<td>8,806</td>
<td>8,800</td>
<td>(6,062)</td>
<td>19,038</td>
</tr>
<tr>
<td></td>
<td>4,296</td>
<td>365</td>
<td>3,802</td>
<td>2,067</td>
<td>2,192</td>
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<td>46,578</td>
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<tr>
<td></td>
<td>11,988</td>
<td>872</td>
<td>8,794</td>
<td>(54)</td>
<td>219</td>
<td></td>
<td>60,731</td>
</tr>
<tr>
<td></td>
<td>5,854</td>
<td>2,619</td>
<td>22,293</td>
<td>668</td>
<td>37</td>
<td></td>
<td>349,303</td>
</tr>
<tr>
<td></td>
<td>87,058</td>
<td>18,019</td>
<td>136,616</td>
<td>19,932</td>
<td></td>
<td></td>
<td>37,406</td>
</tr>
<tr>
<td></td>
<td>6,190</td>
<td>1,028</td>
<td>8,249</td>
<td>1,648</td>
<td>2,797</td>
<td></td>
<td>318,071</td>
</tr>
<tr>
<td></td>
<td>30,150</td>
<td>360,393</td>
<td>61,254</td>
<td>(6,062)</td>
<td></td>
<td></td>
<td>1,556,462</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Portland State University</th>
<th>Southern University of Oregon</th>
<th>University of Oregon</th>
<th>University of Oregon</th>
<th>Western Oregon University</th>
<th>Chancellor’s Office</th>
<th>Eliminations</th>
<th>Total OUS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$224,248</td>
</tr>
<tr>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>$335,573</td>
</tr>
<tr>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$1,556,462</td>
</tr>
</tbody>
</table>

### 2011 Annual Financial Report 51
### SUPPLEMENTARY SCHEDULES

#### CONSOLIDATING STATEMENT OF NET ASSETS

<table>
<thead>
<tr>
<th></th>
<th>Eastern Oregon University</th>
<th>Oregon Institute of Technology</th>
<th>Oregon State University</th>
<th>Total OUS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ASSETS</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Assets</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash and Cash Equivalents</td>
<td>$7,102</td>
<td>$12,250</td>
<td>$145,457</td>
<td></td>
</tr>
<tr>
<td>Total Current Assets</td>
<td>$13,358</td>
<td>$16,824</td>
<td>$225,761</td>
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</tr>
<tr>
<td>Noncurrent Assets</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Noncurrent Assets</td>
<td>$62,563</td>
<td>$77,713</td>
<td>$832,859</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td>$75,421</td>
<td>$94,536</td>
<td>$1,047,658</td>
<td></td>
</tr>
<tr>
<td><strong>LIABILITIES</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Liabilities</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounts Payable and Accrued Liabilities</td>
<td>$2,247</td>
<td>$1,887</td>
<td>$35,361</td>
<td></td>
</tr>
<tr>
<td>Deposits</td>
<td>581</td>
<td>435</td>
<td>2,324</td>
<td></td>
</tr>
<tr>
<td>Total Current Liabilities</td>
<td>6,807</td>
<td>5,322</td>
<td>101,610</td>
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<tr>
<td>Noncurrent Liabilities</td>
<td></td>
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<tr>
<td>Total Noncurrent Liabilities</td>
<td>49,831</td>
<td>56,694</td>
<td>463,203</td>
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<td>$62,223</td>
<td>$944,850</td>
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<tr>
<td><strong>NET ASSETS</strong></td>
<td>$20,383</td>
<td>$32,317</td>
<td>$603,806</td>
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</table>

**2010 ANNUAL FINANCIAL REPORT**

OREGON UNIVERSITY SYSTEM
## OPERATING REVENUES

<table>
<thead>
<tr>
<th>Description</th>
<th>Eastern Oregon University</th>
<th>Oregon Institute of Technology</th>
<th>Oregon State University</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Tuition and Fees, Net</td>
<td>$13,607</td>
<td>$14,089</td>
<td>$152,581</td>
</tr>
<tr>
<td>Federal Grants and Contracts</td>
<td>9,211</td>
<td>6,999</td>
<td>176,390</td>
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<tr>
<td>State and Local Grants and Contracts</td>
<td>2,516</td>
<td>1,920</td>
<td>14,262</td>
</tr>
<tr>
<td>Nongovernmental Grants and Contracts</td>
<td>34</td>
<td>2,836</td>
<td>22,605</td>
</tr>
<tr>
<td>Educational Department Salaries and Services</td>
<td>160</td>
<td>216</td>
<td>27,177</td>
</tr>
<tr>
<td>Auxiliary Enterprise Revenues, Net</td>
<td>6,201</td>
<td>8,248</td>
<td>91,873</td>
</tr>
<tr>
<td>Other Operating Revenues</td>
<td>617</td>
<td>418</td>
<td>5,139</td>
</tr>
<tr>
<td><strong>Total Operating Revenues</strong></td>
<td><strong>53,146</strong></td>
<td><strong>34,713</strong></td>
<td><strong>490,027</strong></td>
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</tbody>
</table>

## OPERATING EXPENSES

<table>
<thead>
<tr>
<th>Description</th>
<th>Eastern Oregon University</th>
<th>Oregon Institute of Technology</th>
<th>Oregon State University</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instruction</td>
<td>14,721</td>
<td>19,552</td>
<td>154,396</td>
</tr>
<tr>
<td>Research</td>
<td>332</td>
<td>181</td>
<td>183,725</td>
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<tr>
<td>Public Service</td>
<td>4,834</td>
<td>3,079</td>
<td>51,068</td>
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<tr>
<td>Academic Support</td>
<td>5,093</td>
<td>4,455</td>
<td>40,297</td>
</tr>
<tr>
<td>Student Services</td>
<td>7,166</td>
<td>2,626</td>
<td>20,570</td>
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<tr>
<td>Auxiliary Programs</td>
<td>7,429</td>
<td>8,923</td>
<td>104,385</td>
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<tr>
<td>Operation and Maintenance of Plant</td>
<td>3,418</td>
<td>3,440</td>
<td>23,802</td>
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<tr>
<td>Institutional Support</td>
<td>4,998</td>
<td>8,016</td>
<td>40,470</td>
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<tr>
<td>Student Aid</td>
<td>4,574</td>
<td>4,762</td>
<td>23,526</td>
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<td>Other Operating Expenses</td>
<td>6,489</td>
<td>3,238</td>
<td>33,996</td>
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<tr>
<td><strong>Total Operating Expenses</strong></td>
<td><strong>49,014</strong></td>
<td><strong>51,754</strong></td>
<td><strong>676,233</strong></td>
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## NONOPERATING REVENUES (EXPENSES)

<table>
<thead>
<tr>
<th>Description</th>
<th>Eastern Oregon University</th>
<th>Oregon Institute of Technology</th>
<th>Oregon State University</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government Appropriations</td>
<td>17,764</td>
<td>19,481</td>
<td>171,644</td>
</tr>
<tr>
<td>Investment Activity</td>
<td>202</td>
<td>58</td>
<td>7,760</td>
</tr>
<tr>
<td>(Loss) Gain on Sale of Assets, Net</td>
<td>(7)</td>
<td>-</td>
<td>(150)</td>
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<tr>
<td>Interest Expense</td>
<td>(2,396)</td>
<td>(5,680)</td>
<td>(71,737)</td>
</tr>
<tr>
<td>Other Nonoperating Items</td>
<td>(179)</td>
<td>1,744</td>
<td>(50,473)</td>
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<tr>
<td><strong>Net Nonoperating Revenues</strong></td>
<td><strong>15,935</strong></td>
<td><strong>18,612</strong></td>
<td><strong>212,352</strong></td>
</tr>
<tr>
<td>(Loss) Before Other Nonoperating Revenues</td>
<td><strong>(2,863)</strong></td>
<td><strong>(5,228)</strong></td>
<td><strong>26,245</strong></td>
</tr>
<tr>
<td>Government Appropriations</td>
<td>2,345</td>
<td>1,697</td>
<td>11,023</td>
</tr>
<tr>
<td>Capital and Debt Service Appropriations</td>
<td>27</td>
<td>-</td>
<td>12,128</td>
</tr>
<tr>
<td>Capital Grants and Leases</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Capital Contributions</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Additions to Permanent Endowment</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Transfer within OCS</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total Other Nonoperating Revenues</strong></td>
<td><strong>4,408</strong></td>
<td><strong>3,136</strong></td>
<td><strong>24,038</strong></td>
</tr>
<tr>
<td>Increase (Decrease) in Net Assets</td>
<td>3,545</td>
<td>698</td>
<td>50,148</td>
</tr>
</tbody>
</table>

## NET ASSETS

- Beginning Balance: $18,858
- Ending Balance: $32,867
- Increase: $14,009

- Portland: $32,867
- Southern Oregon: $35,309
- University of Oregon: $25,558
- Western Oregon: $24,965
- Chancellor's Office: $5,397
- Eliminations: $1,433,794
- Total: $1,433,794

2010 ANNUAL FINANCIAL REPORT 51
## SUPPLEMENTARY SCHEDULES
### CONSOLIDATING STATEMENT OF NET ASSETS

<table>
<thead>
<tr>
<th>Eastern Oregon University</th>
<th>Oregon Institute of Technology</th>
<th>Oregon State University</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Assets</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash and Cash Equivalents</td>
<td>$4,077</td>
<td>$9,430</td>
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<tr>
<td>Collateral from Securities Lending</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Accounts Receivable, Net</td>
<td>4,041</td>
<td>3,634</td>
</tr>
<tr>
<td>Notes Receivable, Net</td>
<td>398</td>
<td>412</td>
</tr>
<tr>
<td>Inventories</td>
<td>414</td>
<td>440</td>
</tr>
<tr>
<td>Deferred Expenses</td>
<td>50</td>
<td>30</td>
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<tr>
<td><strong>Total Current Assets</strong></td>
<td>9,741</td>
<td>14,126</td>
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<tr>
<td>Noncurrent Assets</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash and Cash Equivalents</td>
<td>4,019</td>
<td>16,492</td>
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<tr>
<td>Investments</td>
<td>1,165</td>
<td>195</td>
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<tr>
<td>Notes Receivable, Net</td>
<td>1,614</td>
<td>2,795</td>
</tr>
<tr>
<td>Due From Other OUS Funds and Entitles</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Capital Assets, Net of Accumulated Depreciation</td>
<td>55,695</td>
<td>42,885</td>
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<tr>
<td><strong>Total Noncurrent Assets</strong></td>
<td>62,695</td>
<td>82,885</td>
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<td><strong>TOTAL ASSETS</strong></td>
<td>$72,434</td>
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<tr>
<td><strong>Liabilities</strong></td>
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<tr>
<td>Current Liabilities</td>
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<td></td>
</tr>
<tr>
<td>Accounts Payable and Accrued Liabilities</td>
<td>$1,992</td>
<td>$6,877</td>
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<td>Deposits</td>
<td>540</td>
<td>462</td>
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<tr>
<td>Current Portion of Short-Term Liabilities</td>
<td>1,738</td>
<td>1,785</td>
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<tr>
<td>Deficiency Revenue</td>
<td>1,595</td>
<td>1,643</td>
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<tr>
<td><strong>Total Current Liabilities</strong></td>
<td>$5,005</td>
<td>$10,776</td>
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<td>Noncurrent Liabilities</td>
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<tr>
<td>Long-Term Liabilities</td>
<td>47,591</td>
<td>54,025</td>
</tr>
<tr>
<td>Due From Other OUS Funds and Entitles</td>
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<td>-</td>
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<tr>
<td><strong>Total Noncurrent Liabilities</strong></td>
<td>47,591</td>
<td>54,025</td>
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<td><strong>TOTAL LIABILITIES</strong></td>
<td>$53,596</td>
<td>$64,857</td>
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<tr>
<td><strong>Net Assets</strong></td>
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<tr>
<td>Invested in Capital Assets, Net of Related Debt</td>
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<td>$24,329</td>
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<tr>
<td>Restricted Receivables</td>
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<tr>
<td>Nonrevenue Revenues</td>
<td>554</td>
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<td>Expenditure</td>
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<tr>
<td>Gifts, Grants, Contracts</td>
<td>919</td>
<td>528</td>
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<td>Student Loans</td>
<td>2,007</td>
<td>4,212</td>
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<td>Capital Projects</td>
<td>113</td>
<td>3,272</td>
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<td>Debt Services</td>
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<td>41</td>
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<tr>
<td><strong>Unrestricted Net Assets</strong></td>
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<td>5,773</td>
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<tr>
<td><strong>TOTAL NET ASSETS</strong></td>
<td>$18,588</td>
<td>$31,609</td>
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</table>

<table>
<thead>
<tr>
<th>Portland State University</th>
<th>Southern Oregon University</th>
<th>University of Oregon</th>
<th>Western Oregon University</th>
<th>Chancellor's Office</th>
<th>Eliminations</th>
<th>Total OUS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Net Assets</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$22,975</td>
<td>$22,175</td>
<td>$23,285</td>
<td>$24,215</td>
<td>$25,145</td>
<td>$26,075</td>
<td>$270,195</td>
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<td><strong>Liabilities</strong></td>
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</tr>
<tr>
<td>$12,275</td>
<td>$12,065</td>
<td>$12,515</td>
<td>$13,205</td>
<td>$13,745</td>
<td>$14,285</td>
<td>$150,435</td>
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*2010 ANNUAL FINANCIAL REPORT 57*
## SUPPLEMENTARY SCHEDULES
### CONSOLIDATING STATEMENT OF REVENUES, EXPENSES, AND CHANGES IN NET ASSETS

<table>
<thead>
<tr>
<th>Category</th>
<th>Eastern Oregon State University</th>
<th>Oregon Institute of Technology</th>
<th>Oregon State University</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Operating Revenues</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student Tuition and Fees, Net</td>
<td>$11,953</td>
<td>$12,936</td>
<td>$132,258</td>
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<td>16,232</td>
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<tr>
<td>Non-governmental Grants and Contracts</td>
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<td>438</td>
<td>24,694</td>
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<td>Educational Department Sales and Services</td>
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<td>27,594</td>
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<td><strong>Total Operating Revenues</strong></td>
<td>27,009</td>
<td>33,444</td>
<td>460,604</td>
</tr>
</tbody>
</table>

<table>
<thead>
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<th>Category</th>
<th>Portland State University</th>
<th>Southern Oregon University</th>
<th>University of Oregon</th>
<th>Western Oregon University</th>
<th>Chance-Ritz Office</th>
<th>Eliminations</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Operating Expenses</strong></td>
<td>$157,394</td>
<td>$20,286</td>
<td>$203,974</td>
<td>$23,915</td>
<td>$1,457</td>
<td>(5,731)</td>
<td>$542,276</td>
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<td>7,916</td>
<td>106,395</td>
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<td>1,405</td>
<td>22</td>
<td>49,342</td>
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<td>Research</td>
<td>13,752</td>
<td>3,070</td>
<td>6,821</td>
<td>4,781</td>
<td>222</td>
<td>-</td>
<td>93,130</td>
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<tr>
<td>Public Service</td>
<td>13,566</td>
<td>988</td>
<td>10,027</td>
<td>1,950</td>
<td>190</td>
<td>-</td>
<td>53,976</td>
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<tr>
<td>Academic Support</td>
<td>5,410</td>
<td>3,426</td>
<td>22,131</td>
<td>834</td>
<td>28</td>
<td>-</td>
<td>59,799</td>
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<td>100,911</td>
<td>16,081</td>
<td>-</td>
<td>-</td>
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<tr>
<td>Auxiliary Programs</td>
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<td>1,134</td>
<td>6,421</td>
<td>1,545</td>
<td>-</td>
<td>2,316</td>
<td>22,938</td>
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<tr>
<td>Operations and Maintenance of Plant</td>
<td>295,171</td>
<td>44,974</td>
<td>460,631</td>
<td>62,921</td>
<td>4,513</td>
<td>(5,731)</td>
<td>1,369,461</td>
</tr>
<tr>
<td>Institutional Support</td>
<td>138,054</td>
<td>26,953</td>
<td>179,263</td>
<td>26,260</td>
<td>1,465</td>
<td>-</td>
<td>567,543</td>
</tr>
<tr>
<td>Student Aid</td>
<td>39,628</td>
<td>476</td>
<td>76,231</td>
<td>7,502</td>
<td>-</td>
<td>(4,762)</td>
<td>301,131</td>
</tr>
<tr>
<td>Non-operating Income</td>
<td>8,925</td>
<td>2,175</td>
<td>32,125</td>
<td>461</td>
<td>-</td>
<td>1,605</td>
<td>108,113</td>
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<td>Academic Support</td>
<td>26,598</td>
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<td>39,293</td>
<td>6,412</td>
<td>-</td>
<td>53</td>
<td>130,385</td>
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<tr>
<td>Student Services</td>
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<td>4,488</td>
<td>4,787</td>
<td>5,395</td>
<td>-</td>
<td>-</td>
<td>73,214</td>
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<tr>
<td>Operations and Maintenance of Plant</td>
<td>32,417</td>
<td>19,066</td>
<td>119,759</td>
<td>15,872</td>
<td>-</td>
<td>-</td>
<td>329,919</td>
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<tr>
<td>Institutional Support</td>
<td>25,619</td>
<td>4,048</td>
<td>22,268</td>
<td>4,374</td>
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<td>-</td>
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<td>Student Aid</td>
<td>24,453</td>
<td>5,109</td>
<td>51,353</td>
<td>5,670</td>
<td>14,048</td>
<td>-</td>
<td>151,865</td>
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<td>Non-operating Income</td>
<td>72,006</td>
<td>5,039</td>
<td>15,515</td>
<td>5,307</td>
<td>-</td>
<td>-</td>
<td>72,897</td>
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<td>Non-operating Expenditures</td>
<td>213,318</td>
<td>6,549</td>
<td>23,462</td>
<td>3,519</td>
<td>36</td>
<td>(908)</td>
<td>94,745</td>
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<td>Non-operating Income</td>
<td>379,927</td>
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<td>548,353</td>
<td>84,632</td>
<td>17,287</td>
<td>(3,731)</td>
<td>1,915,923</td>
</tr>
<tr>
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<td>(76,814)</td>
<td>(56,108)</td>
<td>(125,713)</td>
<td>(22,513)</td>
<td>(42,849)</td>
<td>-</td>
<td>(547,254)</td>
</tr>
<tr>
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<td>17,246</td>
<td>73,121</td>
<td>19,761</td>
<td>12,395</td>
<td>-</td>
<td>452,467</td>
</tr>
<tr>
<td>Investment Activity</td>
<td>868</td>
<td>58</td>
<td>3,149</td>
<td>173</td>
<td>-</td>
<td>2,972</td>
<td>2,533</td>
</tr>
<tr>
<td>(Loss) Gain on Sale of Assets, Net</td>
<td>(533)</td>
<td>2</td>
<td>726</td>
<td>9</td>
<td>-</td>
<td>2,946</td>
<td>2,533</td>
</tr>
<tr>
<td>Interest Expense</td>
<td>(2,189)</td>
<td>(1,619)</td>
<td>(16,665)</td>
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<td>-</td>
<td>-</td>
<td>38,112</td>
</tr>
<tr>
<td>Other Non-operating Income</td>
<td>142</td>
<td>2,961</td>
<td>46,323</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>2,961</td>
</tr>
<tr>
<td><strong>Net Non-operating Income</strong></td>
<td>44,854</td>
<td>18,095</td>
<td>92,181</td>
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<p>| NET ASSETS, BEGINNING BALANCE | 156,797 | 42,876 | 425,893 | 26,208 | 71,325 | - | 1,226,274 |
| Ending Balance | $18,838 | $31,609 | $422,748 | - | - | - | $1,229,253 |</p>
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* There are additional supervisors for the practicum
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**Note:** The table continues with additional entries for each country and its corresponding study abroad programs.
Chapter One: Mission, Core Theme, and Expectations

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