Executive Summary

The presidents of Oregon Health & Science University and Portland State University formed the Strategic Partnership Task Force to make recommendations on how the two universities could best collaborate, up to and including a merger. The goal: to find the best way for the two institutions to leverage limited state resources to meet educational needs in the Portland region and Oregon as a whole.

After nearly a year of deep study, frank discussions, and consultation with experts, the Task Force recommends that OHSU and PSU develop a strategic alliance to formally link the two universities and encourage future collaboration. A strong and deep alliance between OHSU and PSU would advance the educational and public service goals of the two institutions in the most efficient and productive way possible. The result could be transformational, leading to higher quality education, more research, greater community engagement, enhanced economic development, growing endowments, cost savings, increased revenue, and an edge in the increasingly competitive higher education marketplace. By contrast, a structural merger would require a significant upfront investment and divert scarce resources and attention from the universities’ core educational and public-service missions. A strategic alliance would avoid the disruption of combining two successful institutions and accomplish the presidents’ goal of increasing the universities’ impact in Portland and statewide. The ultimate beneficiaries would be Oregon and Oregonians.

The Task Force submitted the following recommendations to OHSU President Joe Robertson and PSU President Wim Wiewel:

1) Develop an OHSU/PSU strategic alliance with a clear business model to encourage, facilitate, and monitor future collaboration.

2) Form a steering committee made up of representatives of both universities and the community to oversee and guide the alliance.

3) Pursue the formation of a new, collaborative School of Public Health.

4) Fully explore the creation of a joint non-profit research consortium to produce an OHSU/PSU research portfolio of more than $450 million per year.

5) Expand academic collaboration, research, and programs in fields such as allied health, bioinformatics, basic sciences, and engineering, using the new Collaborative Life Sciences Building as a platform. Encourage collaboration in disciplines not traditionally associated with health and science, such as education, architecture, and many of the humanities.

6) Remove administrative barriers and smooth the path to creating new partnerships and establishing closer collaborations between the two institutions. For instance, create models for handling student tuition disparities, transfer of credits, registration, faculty salary adjustments, and joint faculty credentialing.

7) Jointly coordinate shared instrumentation such as imaging (MRI) tools, electron microscopy, and mass spectrometers, as well as core research resources such as super computers and entrepreneurial support to reduce costs and improve efficiency.
8) Develop a wing of PSU’s University Place Hotel as a “medical hotel” space that allows for 24/7 accommodation of OHSU patients and their families in a family-friendly and affordable environment.

9) Expand administrative collaboration in areas such as information technology, purchasing and contracting, facilities planning, health care delivery, campus public safety, sustainability, wellness programs, student housing, transportation, and child care.

10) Establish an ongoing process of joint faculty recruitment and appointment to facilitate effective collaboration.

11) Coordinate K-12 science education outreach programs to expand the pipeline of students who are prepared to pursue careers in health care and health sciences. Place a special emphasis on outreach to under-represented minorities and children in under-served communities.

12) Support additional operational flexibility for PSU, making it possible for the two universities to form partnerships more easily in areas such as health care delivery, purchasing and contracting, and public safety.

The Task Force identified dozens of other areas of potential future collaboration and, in some cases, has already taken steps to pursue them. A formal strategic alliance between OHSU and PSU would open the door to even more opportunities to work together to achieve excellence in education and research and stimulate the economy in the metropolitan region and the state.

I. Introduction

Oregon Health & Science University and Portland State University are poised to form an innovative strategic alliance that will benefit the Portland metropolitan area, Oregon, and all Oregonians. In the past decade, the two urban neighbors have picked up the pace and intensity of their collaboration, recognizing that they can do more for the state when they combine their resources, especially in the fields of life sciences and public health. Yet they remain separate institutions committed to their public educational missions, as defined by state statutes. At the top of Portland’s Marquam Hill, OHSU provides state-of-the-art clinical care, health professions education, research, and community service in Oregon’s only academic health center. In Portland’s city center, PSU is growing into a major urban research university with a focus on sustainability, community engagement, and educational excellence for nearly 30,000 undergraduate and graduate students. Together, they contribute about $5 billion in economic activity and about 41,000 jobs to the region.¹

Unlike many other large metropolitan regions, Portland does not have a comprehensive university with an academic health center. For several years, policymakers have debated whether combining OHSU and PSU into a single institution would better leverage the educational and economic impact of both schools. In 2005, Rep. Mitch Greenlick formally introduced the idea of a merger between OHSU and

¹ Topogna, John, ECONorthwest; “OHSU and PSU: Economic Contributions,” Presentation to the OHSU/PSU Strategic Partnership Task Force, Jan. 14, 2010
PSU in the Oregon Legislature with HB 2560. The bill would have pulled PSU out of the seven-member Oregon University System and established a new Portland Metropolitan Universities Board of Directors to plan for a merger of OHSU and PSU. The bill failed to pass, but both universities pledged to study the idea. To that end, Oregon University System Chancellor George Pernsteiner commissioned a feasibility study of an OHSU/PSU merger from The Learning Alliance for Higher Education, led by Dr. Robert Zemsky, chairman of the Alliance and a professor at the University of Pennsylvania. The 2007 report, “Considering the Possibility of Merging Oregon Health & Science University and Portland State University,” concluded that a merger would not produce significant savings to taxpayers. In addition, it identified several obstacles to a merger’s success, including differences in mission, culture, business model, scale, governance, growth, and envisioned future. To be successful, the report said, the merger would need strong champions on each campus; advocates in the legislative, executive, and local branches of government; more state revenue; major new philanthropy; and patience and perseverance. However, the scope of the Zemsky report was limited to the question of a full merger. It stopped short of considering the full range of options for collaboration between the two universities.

In 2009, Rep. Greenlick introduced a new merger bill to the state Legislature, HB 3024, similar to the 2005 bill. In a hearing in the House Education Committee in April 2009, Greenlick stated that “integrating and ultimately merging Portland State and Oregon Health & Science University into a single institution over time” is the only way to create a major, top-ranked university in Portland.2 In his public testimony, Greenlick called for PSU to break from the six other universities in the Oregon University System for fiscal matters and gradually merge with OHSU, which has its own independent board. PSU President Wim Wiewel and OHSU President Joe Robertson testified at the hearing that they support the goal of strengthening higher education in Portland, but they questioned whether a merger is the best way to achieve it. They asked for time to study the issue, and the Legislature gave it to them.

A parallel and related discussion is now underway in the Legislature over whether to grant PSU and the other six universities in the Oregon University System more independence from state government to manage their own finances and administration. The proposed change is relevant to the merger debate because it would give PSU more flexibility to form strategic alliances with OHSU, which already operates as a public corporation with its own governing board. Without more autonomy, PSU must follow the same administrative and financial rules as a state agency, making it less nimble in forming new partnerships. PSU President Wiewel supports a call from Governor Ted Kulongoski’s Reset Cabinet and the Oregon State Board of Higher Education to change the governance system for all seven public universities, including PSU.

For advice on how to best collaborate, Presidents Wiewel and Robertson created the OHSU/PSU Strategic Partnership Task Force and charged it with considering the full range of possibilities up to and including a merger. The 24-member Task Force included representatives of the faculty, staff, students, board members and administrators of both universities, plus four community members. (Please see the full roster on page 22 in the Appendix.)

To help guide the discussion, the Task Force turned to Dr. James Samels and Dr. James Martin of The Education Alliance, a Massachusetts-based consulting firm with more than 20 years of experience studying and working on mergers and consolidations in higher education. They urged PSU and OHSU to

2 Transcript of Public Hearing on House Bill 3024, House Education Subcommittee, April 22, 2009
consider a strategic alliance that is mission-complementary, sustainable and beneficial to both institutions and the region. Based on their consolidation experience, Martin and Samels believe that universities with different educational missions can achieve economies of scale, efficiencies of operations, and mutual growth by building a sustainable business model to guide collaboration. PSU and OHSU have already shown they can work together in creative ways, without a full merger. The Task Force has made significant progress toward that goal in a short period of time by establishing a collegial atmosphere for building carefully planned, creative partnerships.

The Task Force formed three subcommittees to study the research, academic and administrative sides of the issues.

- The Research Subcommittee, chaired by Dan Dorsa, Vice President of Research at OHSU, was charged with studying the potential research collaborative opportunities and the possibility of developing a nonprofit research model.

- The Academic Subcommittee, co-chaired by David Robinson, Interim Provost at OHSU, and Roy Koch, Provost at PSU, looked at the potential for additional academic collaboration, how those opportunities match up with unmet educational needs in the Portland area and the state, and what resources are needed to support them.

- The Administrative Subcommittee, chaired by Lindsay Desrochers, PSU’s Vice President for Finance and Administration, considered possible administrative collaborations and whether additional resources would be needed from the state and local government.

Each subcommittee met multiple times and issued reports identifying dozens of opportunities to build on existing partnerships and create new ones. The full Task Force met six times, consulted key faculty, employee, and student groups, and conducted a public hearing.

The Task Force formed its recommendations by closely studying the benefits and disadvantages of a merger and consulting economists, researchers, business leaders, and national experts on academic mergers and alliances. After careful consideration of all the options, including a full merger, Task Force members were united in their belief that both institutions and the Portland region benefit when OHSU and PSU work together. They identified a number of successful partnerships and areas that are ripe for deeper collaboration. They agreed that the two institutions should do everything possible to encourage and facilitate joint research projects, faculty appointments, facilities, and administrative oversight and processes, whenever collaboration makes sense. Task Force members saw a need to create new ways to strategize, plan and facilitate partnerships that meet the educational and economic needs of the region. However, Task Force members determined that a merger is not the best way to accomplish those goals.

This report will make a case for creating a strong and structured OHSU/PSU strategic alliance that maintains the independence of each institution while leveraging their individual resources to achieve excellence. The report will cover the history of university consolidations across the country, the lessons Oregon can draw from them, and the success stories that serve as a model for future collaboration between OHSU and PSU. The Task Force will recommend opportunities to expand partnerships in specific research, academic, and administrative areas and analyze the potential barriers and benefits to making them happen.
II. Academic Mergers and Alliances: History and Case Studies

Dr. Martin and Dr. Samels of The Education Alliance, who have been studying mergers and consolidations in higher education for 20 years, met with the Task Force on multiple occasions to provide members with historical context, case studies, trends, and analysis to help determine the right path for OHSU and PSU. They based their advice on lessons drawn from their experience following the history of academic alliances and mergers.

In their first book, *Merging Colleges for Mutual Growth: A New Strategy for Academic Mergers*, Samels and Martin chronicled the history of consolidations in American higher education. According to Martin and Samels, American colleges and universities have merged and partnered for over a century for a wide variety of reasons, most typically, to grow in an efficient and economically sustainable way. In the typical higher education merger or consolidation of times past, the merging institution would take over a smaller, more fragile institution – and then liquidate its assets and consolidate their collective resources to achieve a perceived larger good and, with that, a more competitive institutional position in the higher education marketplace. Many of these early mergers were mandated by statutory authorization and, in a number of cases, force-fit institutions with mutually exclusive heritage, missions, and future vision. Not surprisingly, not all of these mergers were successful.

In the most typical failed mergers, Martin and Samels say, the combined institutions have not attracted a critical mass of enrollment and endowment, and are thus caught in a perfect storm of fiscal instability. This is not to suggest mergers or consolidations can’t be successful, they say. Rather, it is important to be sensitive to the risks of shotgun academic weddings. The most successful health science alliances are based on a balance of power, control, and autonomy – rather than creating yet another layer of centralized bureaucracy.

Case Studies of Successful Mergers

University of Illinois Chicago Circle and the University of Illinois Medical Center

In 1979, the University of Illinois system executive leadership team publicized a plan to consolidate University of Illinois Chicago Circle and the University of Illinois Medical Center to form the University of Illinois-Chicago. The merger was finalized in September 1982, three years after its announcement. The merger reportedly strengthened the University’s collective academic resources and scholarly productivity – and positioned the University as a major research institution.

In 2004, UI-Chicago considered the advantages and pitfalls of the merger. Faculty and administration reportedly reached a consensus that the merger increased academic prestige, faculty productivity, and research volume, and yielded a more selective and competitive student body. Other advantages included: a stronger UIC/state legislative relationship that promoted state funding opportunities and, significantly, an overall stronger position within the UI system – yet, not at the expense of the success of other UI locations. The merger allowed for new partnerships and collaborations with a variety of research and community centers. Further and importantly, the merger did not adversely impact faculty or staff, with no mass layoffs or major reductions in staffing levels.
In the case of the UIC/Medical Center merger, university leaders recognized early that the process of merging is ongoing, constant, and evolving. Frequent, honest, and open communication helped the merger to occur more smoothly, even though a “two-culture” phenomenon still survived. It should be noted that at the time of this merger, Illinois had the financial resources to invest in combining the campuses, which were both within the University of Illinois system.

University of Toledo and the Medical University of Ohio

On July 1, 2006, the Medical University of Ohio (founded in 1964 as the Medical College of Ohio) merged with the University of Ohio. The Ohio government prompted the merger with House Bill 478 and renamed the institution as the University of Toledo Medical Center (UTMC). Over time, primary stakeholders for the two institutions proposed that a merger would yield an increased budget and greater research funding, while recognizing the challenge of unifying two very different campus cultures.

Steps taken during this process included: combination of existing boards of trustees, creation of a new organizational structure, and adoption of a new strategic merger plan. Staff representatives of the University of Toledo Medical Center reported that the merger has strengthened and diversified their institution. Today, UTMC has the third-largest operating budget of all University System of Ohio institutions. That said, like many other institutions, the University of Toledo Medical Center now faces more than 50 full-time employee layoffs as well as a $1 million budget cut for 2009-2010. Although this merger was legislatively prompted, it was not a shotgun wedding. Leaders in the two institutions supported the merger, and it was phased in over time.

The Medical College of Virginia and the Richmond Professional Institute

In 1968, the legislatively-authorized Wayne Commission Report prompted the Medical College of Virginia and the Richmond Professional Institute to consolidate, still operating under the name Medical College of Virginia. Since the merger, the medical school has added numerous programs and campus infrastructures. In 2004, the name Virginia Commonwealth University Medical Center was established and is now used in reference to all MCV hospitals and VCU’s medical schools. The merger took nearly 40 years to implement, because there was no urgency behind the process. In the end, however, it was considered successful.

Case Studies of Unsuccessful Mergers

Rutgers University and the University of Medicine and Dentistry of New Jersey

On June 16, 1970, the Governor of New Jersey signed The Medical and Dental Education Act, which merged the New Jersey College of Medicine and Dentistry with the medical school of Rutgers University under a universal board of trustees. This merger created the College of Medicine and Dentistry of New Jersey (CMDNJ). In 1981, CMDNJ was elevated to university status and became known as the University of Medicine and Dentistry of New Jersey (UMDNJ), now the leading research university in New Jersey. The National Science Foundation ranks UMDNJ 71st out of 630 research universities and colleges.

During the period between 2000 and 2003, the executive branch of government in New Jersey (under then-Governor McGreevey) proposed a special commission to study the need for merging UMDNJ with Rutgers University. After considerable study and debate, the New Jersey legislature resisted the
temptation to force fit the two institutions – leaving UMDNJ as a comprehensive, unified health science university – based on the perceived success of other comprehensive health science universities and more specifically, the OHSU model. (See the Appendix for “We Were Wrong; Try Partnerships Not Mergers” in the Chronicle of Higher Education and the “Pitfalls of Merger” in the New Jersey Star Ledger.)

In May of 2010, Governor Chris Christie and former Governor Tom Kean proposed the consideration of a comprehensive merger of UMDNJ with Rutgers University and the New Jersey Institute of Technology with the goal of improving New Jersey’s college and university system. In effect, UMDNJ would cease to exist and become absorbed by Rutgers, NJIT, and possibly Rowan University. Representatives of UMDNJ oppose the proposition.

This proposed merger has been unsuccessful primarily because it is a forced political proposal that lacks support from key stakeholders. (At the time of publication of this report, a more limited merger was back on the table.)

Rice University and Baylor College of Medicine

In January 2010, the presidents and senior administrators at Rice University, a comprehensive university, and Baylor College of Medicine, a medical school, reportedly discontinued consideration of a proposed merger. Leaders of both institutions have, however, vowed to strengthen collaborative efforts between the two organizations. Critics reportedly believed that Rice called off the merger based on Baylor’s precarious financial situation. Baylor College of Medicine had been in financial turmoil since 2004. At that time, the university’s operating expenses exceeded its revenue by more than $300 million after ending a partnership with St. Luke’s Episcopal Hospital. Baylor is somewhat unique as a highly ranked medical school without a private adult hospital.

This failed merger shows the importance of sustainable resources to assure the financial viability of the combined institutions.

Pennsylvania State University’s Hershey Medical Center and Geisinger Health System

In 1999, the merger between Penn State, Hershey Medical Center (HMC) and Geisinger Health System officially dissolved. Officials from both institutions reportedly concluded that the merger failed for a variety of reasons, including dysfunctional executive leadership at cross purposes, mutual distrust among board members, lack of a shared vision for the merger, and mutually exclusive organizational cultures. The proposed consolidation was not a merger of equals. Indeed, Hershey physicians and staff felt strongly that they were being taken over by Geisinger, and there were disagreements about the process of selecting new leadership.

In retrospect, leaders and experts have concluded that the consolidation of the competitive clinical programs was not well planned and that the cultural differences between the two institutions were underestimated. It is important to note that predicted economies of scale and cost savings were never fully realized. This case is an example of what happens when a merger lacks strong champions in the faculty and administrative leadership of the institutions.
New York University and Mount Sinai Medical Center

On February 14, 1997, NYU and Mount Sinai Medical Center officially cancelled the proposed merger of the two institutions. Talks of the merger grew out of a mutual need of both institutions to weather cuts in government funding. A major factor in the failed merger was reportedly the superior ranking of NYU medical school over Mount Sinai. Another major reason was that the parties failed to reach a consensus on how the merger would be implemented.

In 1998, however, NYU and Mount Sinai rekindled talks of a merger in which the medical schools would consolidate, but their corresponding hospitals would not. Mount Sinai degrees would be conferred by NYU rather than by the City of New York, which had been conferring the degrees since 1968. The boards of trustees, faculties, debts, and assets of the two medical schools would remain separate; however, the school would be renamed Mount Sinai School of Medicine (MSSM) of New York University. In 2007, however, the proposed collaboration and academic affiliation was called off. Today, NYU continues to grant degrees for MSSM while Mount Sinai is going through the accreditation process to become an individual, degree-granting institution.

Cornell University Medical College and the College of Physicians and Surgeons of Columbia University

In 1996, Cornell University Medical College and the College of Physicians and Surgeons of Columbia University planned to negotiate a merger of the two institutions. Columbia's school had been hit particularly hard by an influx of Medicaid cuts – a vital source of revenue – whereas Cornell's school had not experienced the same trend. Further and significantly, the existence of seven medical schools in New York City in a time of financial strain was an issue that the medical school leaders reportedly considered. In the end, the two schools decided that a strategic alliance would be more beneficial for both institutions than a merger.

University of California San Francisco Medical Center and Stanford University Hospital

After five years of planning a merger between the University of California – San Francisco Medical Center and Stanford University Hospital, the merger was officially dissolved in less than two years. The failure of the merger can be attributed to the following factors: lack of faculty enthusiasm and engagement, significantly different and complex administrative structures and academic cultures, decline in federal funding for medical research, unsustainable growth, and massive financial deficits.

Lessons

Samels and Martin see a number of lessons for Oregon from these successful and unsuccessful mergers. As in the case of the University of California-San Francisco Medical Center and Stanford University Hospital, OHSU and PSU have complex and substantially different administrative structures and academic cultures that would be difficult to merge. Another major concern for the two Oregon universities is that mergers of two economically fragile institutions are likely to fail. Although OHSU and PSU are financially stable at the current time, both institutions have faced two decades of declining state funding and are at risk of additional cuts in the future given the state's economic environment. Given this dynamic, it would be extremely risky to assume that the two universities would be able to obtain the significant upfront investment needed to launch a formal merger or the long-term resources necessary to sustain it and make it successful over time.
In these conditions, Samels and Martin conclude, strategic partnerships are preferable, more manageable, and more successful than mergers. Indeed, some institutions – such as Cornell/Columbia – have formed productive alliances and partnerships after an expensive merger attempt failed. A formal alliance would give OHSU and PSU the momentum and structure they need to foster collaboration and better serve the educational needs of Oregon. In any successful merger or collaboration, a comprehensive, thoughtful, and carefully considered strategic business plan is required to ensure cultural fusion of the two separate entities, as in the case of the successful Toledo/Ohio merger. Leaders of partnering institutions must be willing to honestly, candidly, and frequently address potential issues regarding differences in cultural perspective. The leadership also should attempt to reach a broad consensus on specific forms of collaboration among members of their respective faculty, professional, and classified staff, and other community stakeholders. This Task Force and other partnership discussions prove that OHSU and PSU’s leaders are willing to work together and with their respective stakeholders to resolve any differences and make an alliance successful.

(Please see the Appendix for the full list of criteria and additional materials supplied by Samels and Martin, including merger and consolidation research, teachings, and opinion articles.)

III. Putting the Needs of Oregonians First: The OHSU/PSU Strategic Alliance

In their charge to the OHSU/PSU Strategic Task Force last fall, Presidents Robertson and Wiewel challenged members to identify innovative approaches that would best leverage the strengths of the two universities to meet the needs of Oregonians. Based on a review of best practices, consultation with experts in the field, and a year of in-depth deliberations, it is the opinion of the Task Force that establishment of a formal strategic alliance between the two universities is the approach that most clearly responds to that challenge.

A strategic alliance has the advantage of facilitating the formation of new partnerships without adding significant upfront costs and an unneeded layer of bureaucracy. With a strategic alliance, PSU and OHSU can achieve the desired outcomes – cost savings, economies of scale, enhanced delivery of services to Oregonians and the leveraging of funding and support – while avoiding the structural upheaval of merger. The alliance would be flexible and nimble, allowing the universities to move quickly to create productive partnerships that improve their ability to serve the region and state. A steering committee would guide the alliance as the universities build on the success of existing joint projects, such as the Collaborative Life Sciences Building, Joint MBA in Healthcare Management, and Oregon Master of Public Health.

By contrast, a full merger might be attractive on the surface, but on closer examination has the potential to divert resources and attention from the core missions of PSU and OHSU. Merging the two universities would require a significant upfront investment of money and time to combine divergent goals, cultures, perspectives, and governance and fiscal systems. Given the current financial circumstances facing the state, it seems unlikely such an investment is possible. Even if it were, the Task Force questions
whether it is appropriate to invest the state’s limited funds in pursuing a hard, structural merger when a better and more cost-effective alternative is available.

Collaborations between comprehensive universities and health science universities, such as PSU and OHSU, are most successful when they arise from mission-complementary partnerships that develop close, collegial growth strategies rather than a hostile takeover where a winner takes all, according to Martin and Samels. OHSU and PSU have already demonstrated their willingness and ability to work together closely and voluntarily on a number of partnerships. The Task Force process has fostered even closer relationships and more collaboration between the two institutions that would likely proceed even without a more formal alliance. Regardless, the Task Force recommends that a formal alliance be formed as a way to make certain appropriate collaborations move forward.

Forming a strategic alliance would give OHSU and PSU equal footing in creating partnerships while keeping their administrative and financial operations largely separate and avoiding the distraction and disruption of an attempted merger. A joint steering committee would ensure measurable results and keep the parties focused, on task, and on time. Because the Task Force has embedded these best practices in its recommendations, there is no need for a more disruptive merger or consolidation. In fact, given the divergent cultures of OHSU and PSU and their differing decision-making processes and administrative procedures, the case for mission-complementary partnerships is even more compelling.

IV. OHSU/PSU Collaboration Success Stories

The pace of collaboration between OHSU and PSU has picked up in the past decade with a number of major initiatives that could be models for future joint educational and research ventures. For the most part, these projects have grown out of the shared interests and goals of faculty and administrators, who have worked around bureaucratic obstacles to make them a reality. Four such exemplary projects are the OUS/OHSU Collaborative Life Sciences Building in Portland’s South Waterfront, joint faculty appointments and research, joint graduate degrees in health care management and public health, and a proposed new School of Public Health.

OUS/OHSU Collaborative Life Sciences Building

The OUS/OHSU Collaborative Life Sciences Building is the first of its kind in Oregon and considered a model for future educational and research collaborations in the state. PSU’s parent agency, the Oregon University System, partnered with OHSU to finance and build the new state-of-the-art, sustainable facility, on 20 acres of undeveloped riverfront property in Portland’s South Waterfront, easily accessible from PSU and OHSU by streetcar, buses and an aerial tram. Expected to open in 2013-14, the 279,000-square-foot complex will be home to education and research in biosciences and medical, dental, pharmacy, nursing and other programs from PSU, OHSU, and Oregon State University. The project aims to expand the health care workforce and life sciences and biomedical research to stimulate economic development and attract and promote private partnerships.

A collaborative project of this size is difficult, because each institution operates separately and differently. However, the project proves that those obstacles can be overcome with strong leadership and commit-
ment to the project’s goals. OUS and OHSU are considered equal partners in the project, which will be paid for with $110 million in state bonds, a $40 million private donation to OHSU, and $10 million from TriMet for a light-rail project. OHSU is providing the land. During construction, PSU will act as the fiscal agent and contracting authority and OHSU as the primary construction manager. Success will mean a major step forward in forming long-term partnerships that will have a significant payoff for Oregonians.

Joint faculty and research
OHSU’s Advanced Imaging Research Center, created nine years ago, has grown into an internationally competitive center for research in imaging science, bringing in about $3.5 million in federal grants this year. PSU’s chemistry department also has been growing at a fast pace, with outside research funding increasing from about $500,000 to $4.5 million in the past five years.

When the imaging center needed a chemist to develop the next generation of contrast agents two years ago, it asked PSU’s chemists for help with hiring. In interviews, the top candidates said they wanted to be affiliated with a larger university’s chemistry department with access to graduate students and research colleagues, as well as access to OHSU’s state-of-the-art imaging facility. Because OHSU lacks a chemistry department and chemistry graduate students, PSU saw an opportunity to fill its need for an inorganic chemistry professor and researcher. The two institutions pooled their resources and worked together to create a joint appointment with a competitive salary and start-up package. The professor now divides his time between OHSU and PSU and is considered a vibrant and productive faculty member who makes significant contributions to both institutions.

There were many administrative hurdles to this appointment, however. A strategic alliance would smooth the path to joint appointments and encourage more departments to initiate them. For instance, PSU’s Chemistry Department plans to relocate to the OUS/OHSU Collaborative Life Sciences Building, where the faculty hopes to create more joint appointments with OHSU. Other possible areas of partnership expansion include parasitology, cancer, toxicity, and biomedical engineering.

Joint MBA in Healthcare Management
In 2009, OHSU and PSU teamed up to start the Joint MBA in Healthcare Management Program to help fill a growing need for health care managers with graduate-level business degrees. The three-year program is an additional option to PSU’s long-standing graduate health management programs in the College of Urban and Public Affairs: the Master of Public Administration in Health Administration and the Master of Public Health in Health Management and Policy (part of the collaborative Oregon Master of Public Health program). The new Joint MBA combines OHSU’s strength in the health care industry with PSU’s comprehensive School of Business Administration to train busy professionals with a blend of online and on-campus instruction. The goal of both institutions is to prepare leaders for the rapidly changing health care system.

Although the program has to follow the different rules of each institution, the faculty and administrators work well together and there have been no serious conflicts. The provosts for both schools were committed to the program and have cleared obstacles to make it happen.
Public Health
OHSU and PSU have worked together in the field of public health since 1994, when they, along with Oregon State University, started offering the Oregon MPH program to fill the need for new policy, research and education leaders and practitioners in public health. The program’s 320 graduate students enroll in a home university and can take courses toward their degrees on all three campuses, each with its own specialty. The collaboration allows students to benefit from a rich and deep range of courses, faculty, and research opportunities.

OHSU and PSU are investigating how to serve the growing public health needs of the urban and metropolitan regions of the state by expanding public health education and research. They are pursuing a new School of Public Health that would allow the universities to qualify for more research funding as demand grows for leaders in the fields of health policy and health services research. The complexity of health services in the United States calls for a workforce with skills in research, planning, analysis, and evaluation to help confront America’s most pressing health problems. Enhanced capacity to respond to the public health needs of Oregon will position the universities to provide expanded workforce development and engage in relevant scholarly activities that advance solutions to public health issues.

V. Top Subcommittee Recommendations

ACADEMIC

The Academic Subcommittee, co-chaired by David Robinson, OHSU’s interim provost, and Roy Koch, provost at PSU, was charged with evaluating the potential for additional academic collaborations between PSU and OHSU and assessing how the opportunities match unmet educational needs in the Portland area and the state. As articulated by the two provosts, while the missions of the two institutions are significantly different, they share a fundamental academic mission to strive for the best education for their students. A frank and open discussion about the environmental similarities and differences between the two institutions helped subcommittee members begin to identify where there might be natural relationships between the two institutions.

The subcommittee gathered background on faculty culture and work environment at a joint meeting held by the Faculty Senate leadership of both institutions. The student representatives of the subcommittee presented ideas and concerns about future collaborative opportunities. The committee also heard a presentation from WorkSource Oregon about community workforce needs. Findings from that presentation showed that 12 of the top 20 high-wage/high-demand jobs through 2018 are health-related occupations. This statistic does not include administrative or managerial occupations within a health care setting. The data illuminated the need for new workforce members to have basic science skills and projected high demand for health care professionals, especially in allied health professions. Based on these discussions, the subcommittee recommends the following priorities in pursuing academic alliances between OHSU and PSU.
School of Public Health

Pursue the formation of a new, collaborative School of Public Health. The presidents of OHSU, PSU, and OSU asked the provosts to form a task force to examine this possibility. The overriding concern in the analysis was how best to serve the public health needs of the state, within realistic institutional and accreditation constraints. The task force provided a report of their findings to the presidents of each institution on September 30, 2010, outlining the feasibility of the various possibilities. That report is being reviewed and next steps are being developed.

Allied Health Programs

Start joint programs in various allied health fields such as physical therapy, occupational therapy, respiratory therapy, audiology, speech pathology, and clinical laboratory sciences, taking advantage of new shared space in the Collaborative Life Sciences Building whenever possible. A task force will be charged with delivering a report to the provosts at OHSU and PSU by June 30, 2011.

Joint Academic Appointments

Establish an ongoing process of joint faculty recruitment and appointment to facilitate effective collaboration. A combined working group of deans will deliver a report to the provosts of OHSU and PSU by June 30, 2011.

Bioinformatics/Health Informatics

Begin planning to offer an undergraduate minor and potentially a major in informatics, bioinformatics, and health informatics at Portland State by leveraging the existing faculty expertise at both OHSU and PSU. A task force will be formed to study the feasibility of a new minor and major. The task force should also look at possible ways to promote the increased flow of students into informatics fields at the master's and Ph.D. levels. The task force will be charged with delivering a report to the provosts at OHSU and PSU by June 30, 2011.

Enhancing Existing or Developing New Programs in the Basic Sciences, Engineering, and the Humanities

Leverage the expertise of both faculties to reduce duplication of course material, strengthen the curricula of existing programs by creating new courses or course content, and create new programs to meet the workforce needs of the state in basic sciences, engineering, and the humanities. A task force will be charged with delivering a report to the provosts at OHSU and PSU by June 30, 2011.

Pipeline to Careers in Science

Coordinate K-12 science educational outreach programs at OHSU and PSU to expand the pipeline of students who are prepared to successfully pursue careers in health care and health sciences. Place a special emphasis on outreach to under-represented minorities and children from under-served communities by also involving the diversity programs from each institution. Regular meetings should be established, and quarterly reports of activities and proposed new initiatives should be presented to the provosts at OHSU and PSU to help them monitor progress in this area. The provosts at OHSU and PSU will deliver a report to the presidents on what has been achieved by June 30, 2011.
Academic Administration

The provosts will identify key members from their Academic Affairs staff to examine the administrative issues that have been identified as potentially complicating the establishment of closer collaborations between the two institutions. These include, but are not limited to: alignment of academic calendars; tuition differences and sharing of tuition for joint courses and programs; transfer of credits; transfer of work hours for faculty; and differences in student information systems, financial aid systems and learning management platforms. Individuals will also be selected to explore the establishment of closer collaboration in the areas of academic and student support and faculty development, and how fundamental differences in faculty culture and life in the two institutions might be managed to promote more collaboration. These activities will be ongoing, but the provosts will be expected to give a progress report to the presidents by June 30, 2011.

ADMINISTRATIVE

The Administrative Subcommittee, chaired by PSU Vice President Lindsay Desrochers, began its work by discussing the similarities and differences of the two campuses, so they could begin to imagine where there might be natural relationships between the institutions. Next, they discussed all current administrative collaborations and identified additional areas suitable for future partnerships.

While the Administrative Subcommittee spent most of their time discussing the potential mutual benefits of collaboration, the subcommittee acknowledges that there are challenges as well. Challenges include differences in Oregon Revised Statutes in areas such as purchasing and contracting, health care delivery, and campus safety. Statutory or administrative policy changes would be needed in a number of areas, requiring a thorough study detailing the required financial, legal, and other policy and organizational factors involved.

The subcommittee concluded that OHSU and PSU have distinct, but complementary missions, as well as clear differences in how business is conducted. However, the institutions are already collaborating informally – but successfully – in a number of areas. While acknowledging the complexity of extending collaboration to other areas, the subcommittee believes it makes sense to further explore collaborations where service can be maintained or improved and where it is fiscally prudent and legally possible to do so. The work of this subcommittee fostered useful relationships between the institutions and a new level of mutual understanding.

The subcommittee developed the following list of recommendations, grouped by status (active projects, analysis underway, and for further discussion) and in order of priority. Of the projects, the Life Sciences Complex is included here because it is a living example of how the two institutions can work together for their mutual benefit and the benefit of all Oregonians. The Research Corporation is included here because it would require administrative support in areas such as human resources, accounting, and facilities.
Active Projects

OUS/OHSU Collaborative Life Sciences Building
The Collaborative Life Sciences Building should be operational in 2013-2014. Located in OHSU’s South Waterfront development, this state-of-the-art facility will provide OHSU, PSU, and Oregon State with 279,000 square feet of collaborative instruction and research facilities with shared lecture halls, classrooms, labs, specialty research areas, and offices for instruction in the health professions, undergraduate, and graduate education.

The Administrative Subcommittee suggests the Collaborative Life Sciences Building is a perfect model for future collaborations between OUS institutions and OHSU. The project is overseen by a steering committee made up of representatives from each campus. This body is responsible for project timeline and delivery, scope articulation, and budget oversight. A program committee, made up of representatives from each project campus partner, manages the programmatic elements of the project.

University Place
In 2004, Portland State purchased the Double Tree Hotel (now University Place Hotel) at the corner of Southwest Fourth Avenue and Lincoln Street. The location and amenities of this facility make it a perfect venue to satisfy OHSU’s need for short term, temporary housing for patients and their families. Currently, these patients are forced to rent expensive hotel/motel accommodations to meet this need. Since most of OHSU’s facilities are removed from the downtown proper, this is inconvenient for their patients and families. In addition, PSU is working with OHSU to develop a wing of University Place as a “medical hotel” space that will allow for 24/7 accommodation of patients and families in a more family-friendly and affordable environment than a working hospital.

Analysis Underway

Research Corporation
Were the two institutions to merge research operations, the joint OHSU/PSU research portfolio would be in excess of $450 million per annum. The Administrative Subcommittee is analyzing this idea because an expansion on this scale would have budget and administrative implications for the management of indirect costs within university budgets, human resource requirements, facility management issues, research accounting procedures, labor relations, and a host of other administrative functions.

Information Technology
OHSU and PSU have been collaborating in the area of information technology for some time now, particularly in shared purchasing for networking and telecom equipment. There are several other information technology areas both institutions are analyzing further; for example: shared contracting with the Banner purveyor, Sungard; expanded use of the Oregon Health Network, which provides high quality, live, point-to-point video conferencing throughout the state; disaster recovery and redundancy in the form of shared secure storage space for backup files; and cloud computing (also known as Internet-based computing) whereby shared resources, software and information are provided to computers and other devices on-demand – like the electricity grid.
Purchasing and Contracting

PSU and OHSU are two of the largest contractors and purchasers in the Metro region. Although OHSU’s medical supply requirements differentiate its needs from PSU’s, the two institutions make many routine purchases and contract for services that are common to both. Because the two institutions have different fiscal relationships to the state, they operate in separate regulatory environments and are subject to a different set of purchasing and contracting rules. Further analysis will be undertaken to determine what regulatory and statutory changes are needed to ensure PSU and OHSU have the flexibility necessary to enter into collaborative contracting and purchasing agreements.

Analysis Planned

Facilities Planning

The Collaborative Life Sciences Building represents a major new set of programmatic linkages between OHSU and PSU. This collaboration will also be the first time these two campuses have shared in the developmental planning and management of a capital project. Analysis of lessons learned from this experience could lead to future shared activities in the areas of facilities planning, construction, and management.

Health Care Delivery

As a member of the state’s Public Employees Benefit Board system, PSU has no special arrangement with OHSU as a health services provider. However, OHSU’s employee plan may provide an important additional option to PSU employees; thus serious analysis should be undertaken to assess this possibility. At PSU, student fees include a charge for basic health insurance for all students. A more comprehensive, non-mandatory plan is available, however its cost is increasing rapidly, to the point where it is becoming prohibitively expensive for many PSU students. OHSU has mandatory health insurance for all of its students. The committee would like to analyze the feasibility of combining the two student insurance programs into one, thereby benefiting from the economies of scale. If this proves impossible or imprudent, another option is to have OHSU students use the much larger PSU clinic for routine procedures and basic medical and dental needs.

Campus Public Safety

Both campuses have been undergoing an evaluation of their public safety needs, services, and capacity. Based on preliminary analysis, the most useful collaboration in this service area would be in dispatch. A shared dispatch unit would create savings for both institutions. In addition to dispatch, the other areas for consideration in Campus Public Safety are: contracting for training, administrative support, emergency management, and even the possibility of a shared state police precinct located between the two campuses. A challenge to all of these ideas could be incompatibilities resulting from the two institutions having different enabling legislation. Further analysis is needed to determine whether the Oregon Revised Statutes that govern the two institutions hinder them from collaborating in this critical area.

Sustainability and “Greening the Campus”

In addition to its academic and research programs, as a signatory to the American College & University Presidents’ Climate Commitment, PSU is undergoing its first comprehensive environmental planning process. Phase One sets goals and strategies for all parts of campus operations related to climate mitiga-
tion (energy, buildings, commuting, travel, and materials). Phase Two will include goals and strategies related to storm water, potable water, habitat, and toxics reduction. Further analysis of the information generated by this planning process could identify processes and practices that are transferable to the OHSU’s environment.

Wellness Program
Wellness as a service is diversified throughout both campuses. Student Health Centers, Student Recreation, Student Affairs, Human Resources, and Campus Ministries all provide services in this area. Given the decentralized nature of this service area, it may be difficult to find specific administrative areas in which to collaborate; however, at the very least the two institutions plan to analyze and share best practices in this area.

For Further Discussion
Student Housing
PSU has ambitious plans to eventually house 25 percent of its students in campus housing. At OHSU, on the other hand, student housing is not provided directly to students. Since PSU has expertise in Student Housing and OHSU has demand, this area is ripe for collaboration. However, any collaboration in this area would need to address the needs of varied student populations at OHSU and PSU. That said, there is considerable interest in working together in this area in the future.

Transportation
Although this is an area in which there appears to be no need for collaboration – at this time – there are several areas that warrant further discussion in the future, such as: shared Transportation Demand Management (also known as alternative transportation planning) for the new Life Sciences Building; shared bike storage; and possible co-management of parking for the new Life Sciences Building (depending on the structure of the facility management deal).

Child Care
PSU has long waiting lists for its child-care facilities and is planning to expand in this area. If it is able to increase its overall child-care capacity (in particular for drop-in services), it might be able to make some slots available for OHSU students and employees. A more likely possibility – given OHSU’s recent commitment to the Children’s Creative Learning Center – is to collaborate in the more distant future, if the service demand increases to the point where it makes sense for the two institutions to collaborate on a shared facility or program at that time.

RESEARCH
The Research Subcommittee, chaired by Dr. Dan Dorsa, Vice President for Research at Oregon Health and Science University, was charged with examining the potential for partnership between OHSU and PSU in the research sciences. Before recommending potential collaborative research opportunities between the two institutions, the subcommittee first identified existing partnerships. To understand these existing partnerships, it is important to first appreciate some background about each research institution.
OHSU’s research mission is deeply ingrained in the culture of the university. Its research searches for new cures, new standards of care, and a better understanding of health and the biomedical sciences. OHSU researchers engage in new basic, clinical, and applied research, including environmental and biomedical engineering and information sciences. Most of its funding comes from federal grants, primarily from the National Institutes of Health (NIH). In 2010, OHSU earned $392 million in research awards.

PSU’s research mission builds upon its educational mission. As an institution it strives to conduct “research and community service that support a high quality educational environment and reflect issues important to the region.” While a large portion of PSU’s research funding also comes from federal grants (76% in 2009), a comparatively small portion of those federal funds (30%) comes from the Department of Health and Human Services, which awards all NIH grants. PSU has a long tradition of research in the social sciences, but has recently encouraged significant growth in research associated with the natural sciences as well as engineering and computer science. PSU’s research program is growing rapidly; it has doubled its grant awards in the last ten years. In 2010, research grant awards totaled $58 million. PSU’s goal is to grow its research funding to $100 million by 2017.

The subcommittee identified four general areas of existing partnerships: joint appointments, structural partnerships, subcontracts, and the management of specialized equipment. The subcommittee discussed three forms of structural partnerships currently supporting scientific research in Oregon. Notable structural partnerships include the Oregon Nanoscience and Microtechnologies Institute (ONAMI) and the Oregon Translation Research and Drug Development Institute (OTRAIDI). Currently OHSU subcontracts $2.1 million in research activities per year to PSU. Conversely, PSU subcontracts $500,000 each year to OHSU.

Much of the subcommittee’s conversation focused on potential collaboration in research between the two entities. In each case, some consideration was given to what structure would best support these collaborations. Many of the proposed collaborations could be achieved with a formalized partnership short of a merger with less cost to the state and the institutions.

OHSU has been exploring the possibility of forming a research non-profit entity outside of the larger institution and including another institution, such as PSU, in that entity. Dr. Dorsa has given a presentation on this material to PSU and an abbreviated interview and presentation to Oregon State University and University of Oregon. To date, PSU has shown the most interest, and has hired the same consulting company to look at the viability of PSU making the transition as well. Until the evaluations currently underway by both institutions are complete, it is difficult to predict the benefits and risks to the institutions and the region.

The subcommittee recommended the following steps, to be completed by July 1, 2011:

**Research Nonprofit**

Complete exploration of research nonprofit model at both institutions to determine if collaboration will be mutually beneficial.
Communications
Create a structured forum for communications between the two institutions to generate more opportunities for collaboration and overcome barriers in both the administrative and programmatic/scientific arenas.

Collaborative Life Sciences Building
Fully explore the opportunities afforded by shared research and academic space in the OUS/OHSU Collaborative Life Sciences Building to synergistically build the research portfolios of both institutions.

Shared Instrumentation
Jointly coordinate shared instrumentation such as imaging (MRI) tools, electron microscopy and mass spectrometers. Also coordinate core research resources such as super computers and entrepreneurial support to reduce costs and improve efficiency.

VI. Conclusion
A strong strategic alliance would enhance partnerships and foster deeper links between OHSU and PSU to improve higher education and stimulate the economy in Oregon. To launch and sustain a successful alliance, the universities need support from faculty, staff, and students at both universities, as well as city and state leaders.

The first step would be to form a Steering Committee made up of representatives from both universities and the community that would oversee and guide the alliance to make sure it meets its goals. The Steering Committee would establish indicators of success with milestones in a matrix of proposed partnership initiatives and corresponding time frames for completion. In addition, university leaders would identify staff members who are responsible for removing any administrative and academic barriers to establishing closer collaborations between the two institutions. The Oregon Legislature can help make the alliance strong and productive by granting PSU more flexibility in its operations, allowing it to become as nimble as OHSU in forming new partnerships.

Given Oregon’s budget projections, the Task Force understands that a significant investment from the state could be difficult during the 2011-13 biennium. The initial cost of forming a strategic alliance would be less than a merger because it would not require a complete restructuring of both universities. The initial investment for staffing, facilities, and new projects would come primarily from existing resources within the universities. It is difficult to determine the precise cost of starting a strategic alliance, but it should be modest because it primarily relies on existing staffing and governance structures. Supplemental funding might be necessary in the future to start major collaborative projects, such as the proposed collaborative School of Public Health. However, revenue from new research opportunities and enrollment growth and savings from non-duplication of programs and services may help offset any additional costs in the long term.

As noted by Dr. Samels and Dr. Martin, the best strategic alliances create demand by generating new revenue streams beyond state appropriations and tuition and fees. Typically, such external support comes
from gifts, grants, contracts, and intellectual property revenues. The potential additional revenue would help OHSU and PSU ramp up collaborative research and expand joint educational opportunities in high-demand career tracks such as health care. A highly educated workforce combined with more research innovation could help the Portland region and Oregon attract and retain more businesses and industries that create new, sustainable, well-paying jobs and add to the metropolitan and statewide revenue base.

The OHSU/PSU Strategic Partnership Task Force has made significant progress toward the goal of creating a tighter partnership between the two universities. Task Force discussions have strengthened the spirit of collaboration at OHSU and PSU and set the stage for the formation of the proposed strategic alliance. The alliance would help bridge the gap between the academic health sciences center and the urban university, enhancing educational offerings for Oregonians, bringing in more research and other revenue, and boosting the national reputation of both institutions, without the major upfront investment required by a structural merger.

The Task Force urges Presidents Robertson and Wiewel to take the following actions immediately and continue to pursue other recommendations in this report.

1) Develop an OHSU/PSU strategic alliance with a clear business model to encourage, facilitate, and monitor future collaboration.

2) Form a steering committee made up of representatives of both universities and the community to oversee and guide the alliance.

3) Pursue the formation of a new, collaborative School of Public Health.

4) Fully explore the creation of a joint non-profit research consortium to produce an OHSU/PSU research portfolio of more than $450 million per year.

5) Expand academic collaboration, research, and programs in fields such as allied health, bioinformatics, basic sciences, and engineering, using the new Collaborative Life Sciences Building as a platform. Encourage collaboration in disciplines not traditionally associated with health and science, such as education, architecture, and many of the humanities.

6) Remove administrative barriers and smooth the path to creating new partnerships and establishing closer collaborations between the two institutions. For instance, create models for handling student tuition disparities, transfer of credits, registration, faculty salary adjustments, and joint faculty credentialing.

7) Jointly coordinate shared instrumentation such as imaging (MRI) tools, electron microscopy, and mass spectrometers, as well as core research resources such as super computers and entrepreneurial support to reduce costs and improve efficiency.

8) Develop a wing of PSU’s University Place Hotel as a “medical hotel” space that allows for 24/7 accommodation of OHSU patients and their families in a family-friendly and affordable environment.
9) Expand administrative collaboration in areas such as information technology, purchasing and contracting, facilities planning, health care delivery, campus public safety, sustainability, wellness programs, student housing, transportation, and child care.

10) Establish an ongoing process of joint faculty recruitment and appointment to facilitate effective collaboration.

11) Coordinate K-12 science education outreach programs to expand the pipeline of students who are prepared to pursue careers in health care and health sciences. Place a special emphasis on outreach to under-represented minorities and children in under-served communities.

12) Support additional operational flexibility for PSU, making it possible for the two universities to form partnerships more easily in areas such as health care delivery, purchasing and contracting, and public safety.
VII. Appendix

OHSU/PSU Strategic Partnership Task Force Members

Portland State University
Dave Yaden, Member of the Oregon State Board of Higher Education
Lindsay Desrochers, Vice President for Finance and Administration
Roy Koch, Provost
Bill Feyerherm, Vice Provost, Research and Graduate Studies
Sherril Gelmon, Professor of Public Health, Faculty Senate Representative
Sean Green, Graduate Student, Public Administration; Student Representative
Marc Nisenfeld, Development Engineer, Science Support Services; SEIU Representative
Jonathan Kenji Uto, Equity Retention Coordinator, Student Affairs; AAUP Representative
Margaret McCue, Adjunct Instructor, Women’s Studies; AFT Representative

Oregon Health & Science University
Charles Wilhoite, Board Member
David Robinson, Interim Provost
Dan Dorsa, Vice President, Research
Irene Barhyte, Chief Financial Officer
Charles Allen, Senior Scientist, Faculty Senate Representative
Peter Rapp, Executive Vice President and Director, Clinics and Hospitals; Health System Representative
Rachel Pilliod, M.D. Candidate, Student Representative
Jaimie Sorenson, Patient Access Specialist Coordinator, AFSCME Representative
Harold Fleshman, Registered Nurse, ONA Representative

Community Members
Tom Imeson, Director of Public Affairs, Port of Portland
Ryan Deckert, President, Oregon Business Association
Malia Wasson, Executive Vice President, Commercial Banking, and Oregon President, U.S. Bank
John Miner, Managing Director, Pivotal Investments

Staff to Task Force and Subcommittees
Lois Davis, PSU Chief of Staff
Suzy Funkhouser, OHSU Government Relations
Ryan Fisher, NW Public Affairs
Alisa Dunlap, OHSU Government Affairs
Rachel Martinez, PSU President’s Office
Suzanne Pardington, PSU Communications
Mark Wubbold, PSU Finance & Administration

OHSU/PSU Strategic Partnership Task Force Subcommittees

Research
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Roy Koch, Co-chair
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Sean Green
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Margi McCue
Charles Allen
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Ryan Deckert

Administrative
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Irene Barhyte
Peter Rapp
Harol Fleshman
Jaimie Sorenson
Malia Wasson
Key Criteria
Samels and Martin provided the Task Force this list of key criteria to consider in their discussions of whether to merge or deepen their collaboration.

1) Impact on academic ranking and reputation
2) Mission complimentarity
3) Shared vision
4) Mutual trust and respect – personal and professional
5) Mutual profitability – surplus – cross subsidization
6) Positive impact on fundraising and friend-raising
7) Positive impact on primary stakeholders – students, faculty, staff, alumni, trustees, business and civic leaders, executive and legislative branch, benefactors and advocates
8) Positive impact on statewide and metropolitan Portland economies
9) Strengthening medical and health science educational resources, programs, facilities, technologies and discovery research
10) Avoidance of brand confusion
11) Sustainable, synergistic, value-added post partnership results
12) Institutional buy in and pride of ownership
13) Harmonious integration of campus cultures
14) Effectuating economies of scale and efficiencies in operation
15) Opportunities for non-duplication of programs
16) Expanded community of scholars
17) Geographic proximity
18) New competitive advantage – increased market share
19) Increased autonomy
20) Elevated visibility
Articles by Dr. James Martin and Dr. James Samels of the Education Alliance


- New Jersey *Star Ledger*, “The pitfalls of a higher ed mergers” – Samels, November 14, 2002

- The *Chronicle of Higher Education*, May 17, 2002 – “We Were Wrong: Try Partnerships, Not Mergers” – Martin & Samels


