Implementing Oregon’s Restructured Opportunity Grant: Shared Responsibility

Escalating Engagement Forum

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David Longanecker
President
Western Interstate Commission for Higher Education (WICHE)

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The Case for Change in Oregon: Oregon’s loss of competitiveness

- The State’s loss of Competitiveness
Percent of Adults with an Associate Degree or Higher by Age Group – Top Countries and the United States

Source: Organization for Economic Co-operation and Development (OECD), Education at a Glance 2007
Prepared by NCHEMS
Differential National Performance:
Differences in College Attainment (Associate and Higher) Between Young and Older Adults—Percent of Adults with College Degrees

Source: U.S. Census Bureau, 2000 Census via NCHEMS
The Case for Change in Oregon: Oregon’s loss of competitiveness

- The State’s loss of Competitiveness
- Oregon Higher Education’s loss of affordability
  - Community college tuition rose 99% in 10 yrs.
  - OUS tuition represents 8.5% of MFI, double tuition paid 30 yrs ago.
  - 600,000 Oregonians "16 years old or older" not in high school, never enrolled in postsecondary
The Case for Change in Financial Aid: It wasn’t working

- “More Is Better and Never Enough” rationale wasn’t selling
- Support was atrophying
- Eligible students weren’t participating
And Research by the Affordability and Access Working Group Indicated Why

- Folks believed everyone should have a shot at college,
  - **BUT,** they should pay their way “like I did”.
- And, the myth perceived as reality:
  - “If my kids (and I) have to work for this, why should poor folks kids get a free ride.”
The Process for Change

- A Timely and Time-taking Venture:
  - First discussion – December 2002 – OUS Retreat
  - Unique in that impetus came from outside the financial aid community – OUS, then new Governor, and business community.
  - Inclusive process – AAWG with broad array of stakeholders.
Oregon Opportunity Grant
SHARED RESPONSIBILITY MODEL

Cost of Attendance

- Tuition & Fees
- Books, supplies & tools
- Modest living expenses

Step 1
Student Share- Work, loans, savings, scholarships

Step 2
Family Share- Income & Assets

Step 3
Federal Share- Pell Grant & tax Credits

Step 4
State Share- Fill the gap
Cost of Attendance
- Tuition & Fees
- Books, supplies & tools
- Modest living expenses

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Student Share - Work, loans, savings, scholarships

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The Elegance of this Philosophy – One Man’s Perspective

- It fits what Oregonians say they want
  - The Work Ethic
  - Fairness for all
- It fits the actual practical reality of Oregon (Students were already working at least this amount – why not recognize that)
- It is simple to relay to people -- 4 partners with students first, “as they should be”
The Elegance of this Philosophy – One Man’s Perspective

- It works in the Political Arena
  - Conservative public policy makers can endorse because it taps out others before claiming public funds
  - More liberal public policy makers can endorse because it logically justifies greater investment for an important public good
- Anecdotally: Oregon legislators now often refer to this as “their new financial aid program”.
Implementing this concept

- Change is always difficult
- But, this isn’t as tough as you might imagine.
  - Dilbert: “Change is Great, you go first”
- As you will hear from the Minnesota folks.