



As the Oregon State Board of Higher Education (OSBHE) and Chancellor's Office entered our final year, the following set of principles guided our work:

1. Manage all activities that are legally or contractually required under a four-university system
2. Support the successful establishment of institution Boards of Trustees at Eastern Oregon University (EOU), Oregon Institute of Technology (OIT), Southern Oregon University (SOU), and Western Oregon University (WOU)
3. Complete a successful closure of the Office of the Chancellor and sunset of the OSBHE, including all necessary records, contracts, inventory, property, and cash management

OREGON STATE BOARD OF HIGHER EDUCATION ACCOMPLISHMENTS - 2014 -15

- o Convened three full Board meetings and nine executive or special Board Meetings
- o Appointed an Acting Chancellor
- o Approved 2014-15 operating budget allocations as directed by the Higher Education Coordinating Commission (HECC)
- o Approved Resolution for sale of bonds for Technical and Regional Universities (TRUs)
- o Approved academic programs and forwarded them to the HECC for final approval
- o Established Guidelines for conditions placed on EOU and SOU
- o Working with the new Independent Boards, participated in Presidential Searches at EOU & WOU
- o Appointed Presidents for EOU & WOU
- o Established tuition and fees for 2015-16 for the four TRUs
- o Approved and submitted Achievement Compacts on behalf of the four TRUs to the Oregon Education Investment Board
- o Facilitated discussions with EOU and SOU resulting in a Conditions Report to be forwarded to HECC

CHANCELLOR'S OFFICE ACCOMPLISHMENTS - 2014-15

CHANCELLOR

- Engaged the Association of Governing Boards to work with Campus Administration and Independent Boards on transition
- Revised position descriptions, rules and policies to accommodate reduced staffing levels and shifting responsibilities
- Met with HECC over the year to discuss transition issues
- Consulted with Secretary of State on transition of all Chancellor's Office records, as required by law
- Facilitated and participated in presidential searches at EOU & WOU
- Worked with internal and external stakeholders, and outside expertise, as needed, to facilitate closure of the Chancellor's Office
- Established Closing Book to record transfers of equipment, furniture and files, and assignment of contracts and other information deemed appropriate
- Worked with University Shared Services Enterprise (USSE) to establish contract for necessary financial closure of the Oregon University System (OUS) after 6/30/15
- Organized and transferred paper and electronic files to campuses for Capital Construction, land and leases
- Held website closing meeting with all 7 campuses, USSE and HECC to ensure future contact info for the public on OUS website
- Develop Q & A for campuses and HECC

COMMUNICATIONS

- Managed OUS website updates until closure, including archiving
- Distributed Newsclips to interested parties

FINANCE & ADMINISTRATION

- Worked with TRUs on budget and capital requests for 15-17 to the HECC
- Distributed funds to the Institutions per HECC Budget for FY15
- Managed operating budget for Chancellor's Office
- Provided business service support for Chancellor's Office
- Participated in shared services as needed
- Convened Admin Council for TRU institutions
- Managed inventory and all property and cash balance dispositions
- Prepared Finance and Administration paper and electronic records for SOS Archives
- Prepared Spreadsheets of all furniture and equipment and sent same to TRUs and HECC for possible distribution
- Closed Chancellor's Office Books for FY15

INSTITUTIONAL RESEARCH FOR OUS

- Provided Institutional Research support and training to TRU institutions
- Facilitated Achievement Compact reporting
- Prepared paper and electronic files for transfer to HECC or State Archives
- Ongoing SCARF data collection, validation and report generation

INSTITUTIONAL RESEARCH FOR HECC TRANSITION

- Supported HECC data needs throughout legislative session
- Participated in Hiring of director for HECC Research and Data Unit
- Provided input into various building efforts including single postsecondary database, website development, budget model development, institutional performance framework, Key Performance Metrics for the Department of Administrative Services, and others
- Moved, purchased, and installed required hardware and software for transition to HECC and executed HECC/USSE contract for ongoing Oracle database support for former OUS Institutional Research employees

INTERNAL AUDIT

- Conducted or assisted in eleven audits at the TRU institutions
- Organized files in Team Mate to send Institutional copies to each Institution
- Organized files in Team Mate for archiving with Secretary of State

LEGAL SERVICES

- Served as General Counsel to OSBHE, Chancellor
- Served as General Counsel to TRU institutions through December
- Advised on policy and Oregon Administrative Rules transition to TRUs
- Managed contract transition to minimize risk to OUS and TRUs
- Advised on record retention and management
- Monitored and transitioned outstanding litigation in which a TRU institution or Chancellor's Office is a party
- Convened and trained, if requested, legal counsel hired by TRU institutions
- Assisted with Presidential Searches (especially compliance and negotiations)
- Worked with legislative counsel and stakeholders on legislation to effect the closure
- Responded to Chancellor's Office public records requests
- Organized and transferred Institutional legal records to campuses

OSBHE'S OFFICE

- Provided Board orientation and support to new members
- Facilitated Board meeting preparation and support
- Prepared Board records for permanent storage as required by law