

Linn-Benton Community College



Year Six Policies, Regulation, and Financial Evaluation Report

September 2022

Northwest Commission on Colleges and Universities

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Instructions to the Reviewer

Links in this document will take the reviewer to one of two places:

- 1) The Linn-Benton Community College website. All public-facing pages will display when the reader clicks the link. These are designated as hyperlinks with blue, underlined text.
- 2) A document linked in the appendix. These are designated as blue text with no underline. Links to evidence referenced more than once within a standard appear only with the first reference.

Eligibility Requirements

We attest that Linn-Benton Community College (LBCC, or the college) remains compliant with the Northwest Commission on Colleges and Universities (NWCCU) Eligibility Requirements.

Introduction

Linn-Benton Community College is a public two-year institution located in the northwest of Oregon, with six locations in Linn and Benton Counties, including a main campus in Albany; the Corvallis Campus in Corvallis; a Lebanon Center, an Advanced Transportation and Technology Center, and a Healthcare Occupations Center in Lebanon; a Sweet Home Center in Sweet Home; and community and continuing education programs on all campuses and at several community sites. Linn-Benton Community College (hereafter LBCC) also offers extended learning. Founded in 1968, LBCC first received accreditation status in 1972 and has maintained that accreditation without interruption. LBCC is the sixth largest of Oregon's seventeen community colleges, educating more than 12,000 students per year. Its Guided Pathways offer seven core areas of study, leading to more than 80 career technical education and transfer degree programs. The college has more than 300 business partners in its programs.

2.A.1 The institution demonstrates an effective governance structure, with a board(s) or other governing body(ies) composed predominantly of members with no contractual, employment relationship, or personal financial interest with the institution. Such members shall also possess clearly defined authority, roles, and responsibilities. Institutions that are part of a complex system with multiple boards, a centralized board, or related entities shall have, with respect to such boards, written and clearly defined contractual authority, roles, and responsibilities for all entities. In addition, authority and responsibility between the system and the institution is clearly delineated in a written contract, described on its website and in its public documents, and provides the NWCCU accredited institution with sufficient autonomy to fulfill its mission.

At the top of LBCC's governance structure is the Board of Education, composed of elected officials, who have no contractual, employment relationship, or personal financial interest in the institution. Elected members of the Board of Education have roles clearly defined within Board Policy and Board Operational Procedure documents. Specifically, the [2000 series Board Policies](#) delineates the functions assigned to the Board of Education, and the [3000 series](#) defines the roles of the Board and the role of the College President and the delineation of authority as it pertains to those respective roles. These documents are reviewed and revised on a regular schedule as per the [Board Policy Review Schedule](#).

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

The LBCC Executive Leadership Team consists of the following positions, which all report directly to the [College President](#). 1) [Vice President of Academic and Student Affairs](#). 2) [Vice President of Finance and Operations](#). 3) [Executive Director of Diversity, Equity, and Inclusion](#). 4) The [Executive Director of Institutional Advancement](#). 5) The [Director of Human Resources, Development, and Support](#).

The remainder of LBCC's leadership and organization is shown on the [LBCC Organizational Chart](#), which illustrates the level of authority, responsibility, and accountability as well as assessing performance/effectiveness in their charged areas.

MERIT (the Mission, Effectiveness, Resources, and Improvement Team) is responsible for monitoring and using data to assess the extent to which LBCC has achieved or is making progress on achieving the institution's mission and goals. MERIT is led by the Vice President of Academic and Student Affairs and the Director of the Institutional Effectiveness. Each year, the [MERIT report cards](#), which show the target and actual results of each objective, are presented to the Board of Education in the Vice President of Academic and Student Affairs Board Report.

2.A.3 The institution employs an appropriately qualified chief executive officer with full-time responsibility to the institution. The chief executive may serve as an *ex officio* member of the governing board(s) but may not serve as its chair.

The LBCC President, Dr. Lisa Avery, serves as Clerk of the Board of Education to assure the Board is kept apprised of their duties, responsibilities, and legal responsibilities in the dispensation of their duties as defined in Board Policy and Board Operational Procedure statements. The LBCC President does not serve as Chair of the Board. The Board selects its Chair from the group of elected members per the process outlined in [Board Policy 2030](#). The Presidential hiring process is driven by the Board of Education and conforms to all requisite requirements as stated in applicable Oregon Revised Statutes.

2.A.4 The institution's decision-making structures and processes, which are documented and publicly available, must include provisions for the consideration of the views of faculty, staff, administrators, and students on matters in which each has a direct and reasonable interest.

To achieve mission fulfillment, LBCC has focused decision-making into two spheres – the innovation sphere and the operations sphere. Within each sphere are several councils and committees to meet a variety of needs. With the exception of some councils which have limited membership for a reason, all councils and committees include broad cross-campus representation, with membership including staff, students, faculty (part- and full-time), and administrators.

Our [Guide to Governance](#) explains LBCC's governance structure, and membership of councils and committees is maintained on a [spreadsheet](#), which is reviewed several times a year to make sure the membership is correct and representative of the campus.

2.B.1 Within the context of its mission and values, the institution adheres to the principles of academic freedom and independence that protect its constituencies from inappropriate internal and external influences, pressures, and harassment.

LBCC's [Board Policy 1015](#) and attached [Administrative Rule 1015-01](#) address the college's commitment to nondiscrimination and non-harassment. If a student or LBCC staff/faculty experience harassment, information is found on this [webpage](#) for resources and information, including the link to the [page with forms](#) to report various types of harassment or abuse, such as sexual misconduct, academic misconduct, and complaints against the college. LBCC does not practice aggressive recruiting of any students. Additionally, LBCC affirms academic freedom in [Board Policy 4050](#), as well as both the [Full-time Faculty Association Contract](#) and the [Part-time Faculty Association Contract](#).

2.B.2 Within the context of its mission 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 test and examine all knowledge and theories, thought, reason, and perspectives of truth. Individuals within the institution allow others the freedom to do the same.

Linn-Benton Community College has adopted both [Board Policy 1055](#) and its related [Administrative Rule 1055-01](#) to provide surety to its community of the rights of individuals for the freedom of expression and its essentialism to mission fulfillment. Additionally, Academic Freedom is addressed in Article 26 of the [Full-time Faculty Association Contract](#), and Article 14 of the [Part-time Faculty Association Contract](#), both of which affirm an atmosphere of freedom of thought, intellectual expression, and exchange of ideas. LBCC's policies regarding freedom of expression and respectful engagement, as well as policies for specific areas like bulletin boards on campus or LBCC art galleries, are explained on our [Freedom of Expression](#) webpage.

2.C.1 The institution’s transfer-of-credit policy maintains the integrity of its programs and facilitates the efficient mobility of students desirous of the completion of their educational credits, credentials, or degrees in furtherance of their academic goals.

LBCC has adopted [Board Policy 4020](#) and the related [Administrative Rule 4020-08](#) to explain the college’s intent of valuing the multiplicity of avenues leading to achieving the requirements for graduation while ensuring the overall quality and value of LBCC education.

2.C.2 The institution’s policies and procedures related to student rights and responsibilities should include, but not be limited to, provisions related to academic honesty, conduct, appeals, grievances, and accommodations for persons with disabilities.

All students are expected to abide by Linn-Benton Community College’s [Board Policy Series on Student Rights and Responsibilities](#) (which includes Administrative Rules 7030-01, 7030-02, 7030-03, and 7030-04). [Administrative Rule 7030-01, the Student Rights, Responsibilities, and Conduct Code \(“Code”\)](#), outlines the values underlying LBCC’s rules for students, jurisdiction and applicability of the Code, student responsibilities and rights, the rules for students, and the resolution options and processes if students are alleged to have violated a college policy. The Code also lists the appeals processes for student accountability process decisions and grievance procedures available to students. The Code outlines options for students to request accommodations. [Administrative Rule 7030-02, Academic Integrity and Honesty](#), outlines specific academic integrity expectations for students. Information for students to file a grievance, called “Complaint Against the College,” can also be found on the [“Reporting Concerns at LBCC”](#) webpage, which is linked in AR 7030-01.

Finally, the college maintains an [Equal Opportunity and Statement of Nondiscrimination](#), available in five languages. This statement is linked at the bottom of every LBCC webpage and outlines a student’s options for requesting disability accommodations. The statement also explains the pathway for Title IX and discrimination or harassment complaints. College staff is instructed to include a comprehensive version of this statement in multi-page documents that communicate admissions, recruitment, or policy information to students or potential students, employees or potential employees, and participants and applicants, including but not limited to program bulletins, announcements, the LBCC Catalog, handbooks, application forms, community-wide publications, and admissions and recruitment materials, postings, and applications. A summary statement is used on brief publications (one page or less) and event fliers. [Resources](#) with copies of the comprehensive and summary statements and when to use them is located in an employee shared google drive.

2.C.3 The institution’s academic and administrative policies and procedures should include admission and placement policies that guide the enrollment of students in courses and

programs through an evaluation of prerequisite knowledge, skills, and abilities to ensure a reasonable probability of student success at a level commensurate with the institution's expectations. Such policies should also include a policy regarding continuation in and termination from its educational programs, including its appeal and re-admission policy.

LBCC is a member of the National Association of College Admission Counseling and follows the guidelines outlined in the [NACAC Guide to Ethical Practice in College Admission](#). Currently, no AR guides recruitment practices.

Admission Standards are outlined in [Admission Standards AR 7075-02](#) and more details for admissions are outlined in the [How to Get Started: Admission](#) page of the catalog.

[Restricted Access Programs AR 7075-03](#) (Special Admit programs) cover admission, dismissal, appeal process, and special considerations such as reserved student enrollment to support area employer needs.

Placement is addressed in the catalog under [Student Affairs- Academic Support](#) and is not addressed in the admission or registration areas of the catalog. Prerequisites are addressed in [How to Get Started - Registration](#). An explanation of placement scores from placement testing for math and writing is available on the [Placement website](#).

Termination from educational programs is guided by different ARs. Students can be terminated from Restricted Access programs, which is guided by [AR 7075-03](#) (including the appeal process). Other reasons for termination of student status are Academic Dishonesty (guided by [AR 7030-02: Academic Integrity](#)), Academic Suspension (Guided by [AR 4020-11: Academic Standing](#)), and Suspension for behavioral reasons (Guided by [AR-7030-01: Students Rights and Responsibilities](#)).

LBCC does not currently have a readmission policy. Students may resume taking classes if they have been previously admitted and currently do not need to be admitted again if they have been inactive.

2.C.4 The institution's policies and procedures regarding the secure retention of student records must include provisions related to confidentiality, release, and the reliable backup and retrievability of such records.

Access to student data is handled by role-based permission that goes through an approval process. Staff is taught how to use systems and expectations related to privacy. As new systems are considered, security, roles, and confidentiality are vetted before a contract is signed and the system is implemented. If a student chooses to add “[Confidentiality](#)” to their student records, that is handled in the college ERP, Banner, and then cascades out to different systems. The release of student records goes through the Registrar's Office and is in accordance with FERPA. Most college systems are backed up online, while Banner is backed

up on-premise and also at a remote location. LBCC moved in September 2022 to having moving Banner cloud-hosted, so data is now backed up remotely.

2.D.1 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 ensure accuracy and integrity in all representations about its mission, programs, and services.

The Linn-Benton Community College [website](#) is the main source of information for students and the community. LBCC regularly reviews its material in print and on the web for accuracy and integrity and makes sure it accurately aligns with the student experience, state and federal requirements, and the college mission.

To maintain consistency and accuracy with the website, there are several people on campus who can edit pages belonging to their areas, but all edited pages go through the Senior Data Analyst to verify and make corrections before they are published.

Announcements from LBCC, such as closure announcements or press releases, are handled through the Institutional Advancement Office. This office is also responsible for press requests, which allows our communications to remain consistent and timely. Social media posts on [Facebook](#) and [Instagram](#) are created and posted by the Recruitment Marketing Office, and the Institutional Advancement Office can also post in coordination with the Recruitment Marketing Office.

2.D.2 The institution advocates, subscribes to, and exemplifies high ethical standards in its management and operations, including in its dealings with the public, NWCCU, and external organizations, including the fair and equitable treatment of students, faculty, administrators, staff, and other stakeholders and constituencies. The institution ensures that complaints and grievances are addressed in a fair, equitable, and timely manner.

LBCC maintains a web-based [reporting portal](#) to simplify the reporting of complaints/grievances, both internal and external. This portal invites internal and external customers to report safety concerns, harassment, discrimination, retaliation, sexual misconduct, academic misconduct, student general misconduct, and other complaints against the college.

In addition, LBCC has established and maintains a regular review cycle for all its [Board Policies and Administrative Rules](#), many of which clarify reporting, follow-up, and appeals processes related to employee issues like harassment/discrimination/Title IX issues ([BP 1015](#) and [AR 1015-](#)

01), standards of employee conduct ([BP 1045](#) and [AR 1045-01](#), ethics and whistleblowing ([BP 1020](#) and [AR 1020-01](#)), workplace violence ([BP 1025](#) and [AR 1025-01](#)), abuse reporting ([BP 1040](#) and [AR 1040-01](#)), alcohol/drug use ([BP 6135](#) and [AR 6135-01](#) and equal employment opportunity ([BP 1050](#) and [AR 1050-01](#)). In addition, each of the college's three collective bargaining units ([Full-time Faculty, Part-time Faculty, and Classified](#)) have grievance reporting, follow-up, and appeals processes built into their respective collective bargaining agreements to clarify what employees may do if they believe the college has, in any way, violated any specific provision of those agreements.

Board Policies and Administrative Rules related to the student experience are also in place, including the [Student Rights, Responsibilities and Conduct Code \(AR 7030-01\)](#).

2.D.3 The institution adheres to clearly defined policies that prohibit conflicts of interest on the part of members of the governing board(s), administration, faculty, and staff.

[Board Policy 1020](#) and [Administrative Rule 1020-01](#) clearly state prohibited conflicts of interest for both Board Members and employees by referencing Oregon Revised Statutes, which cover both conflicts of interest, whistleblowing, and prohibit retaliation in the event of whistleblowing.

2.E.1 The institution utilizes relevant audit processes and regular reporting to demonstrate financial stability, including sufficient cash flow and reserves to achieve and fulfill its mission.

LBCC relies on both formal [financial statements](#) and internal financial management reports to actively track, manage, and demonstrate financial stability. [Board Policy 5010](#) requires monthly financial updates to the Board including budget tracking and projections for the fiscal year. The financial reports are included in each monthly [Board agenda packet](#). The reports allow for year-to-date reporting and projections on major revenue categories including state funding, property taxes, tuition fees, and other sources (miscellaneous revenue, investment income, etc.) as well as broad expense categories including personnel costs, materials and services, and transfers out (debt service, major maintenance, etc.).

These revenue and expense projections are also incorporated into a five year [budget projection model](#). This model is updated throughout the fiscal year and presented to campus and the Governing Board at numerous intervals. The model presents the expected results of the current fiscal year and applies variables for future years to illustrate long-range financial trends/trajectories. It also incorporates the fund balance level of the college and how future operational results impact those reserve funds. This model provides the financial context for tuition rate decisions by the board and the overall financial direction behind the [annually adopted budget](#). Discussion around the key variables in the model allows for sight on major

contracts, funding changes, disruptions, and other relevant components to the ongoing financial picture.

Along with other internally generated financial reports, the above documents provide the backbone for monitoring and managing the financial stability of LBCC.

2.E.2 Financial planning includes meaningful opportunities for participation by stakeholders and ensures appropriate available funds, realistic development of financial resources, and comprehensive risk management to ensure short term financial health and long-term financial stability and sustainability.

LBCC endeavors to present financial information at all levels with the most transparency possible. The process of informing campus and soliciting input/participation begins in the fall of each fiscal year. A fall budget forum is held across campus where updated projections are provided for the current fiscal year. The projections are incorporated into the five year budget projection model. Additional forums are offered in the winter and spring terms as key financial information comes into focus. The January Board meeting is typically dedicated to the first major discussion of the coming fiscal year and informs subsequent decision making during the spring budget timeline. Separate open budget forums are also held with Student Government to allow for student-centered questions, concerns, and discussion on how the overall budget situation impacts recommended tuition rates. This progression of updates and financial information is posted on the President's webpage under the [Budget Center](#) section.

These updates and forums are held concurrently with an internal budget process. The LBCC budget process is centered around [Oregon Budget Law](#) which prescribes the general format of the budget, requires development of established [budget dates/milestones](#), and outlines a formal approval process. Internal budget development begins with the release of operating budget information to departments across campus. Budgets are updated to reflect actual spending expectations and any staffing changes or grant adjustments. Any requests for new/additional funds are solicited through formal budget enhancement request forms and discussed by budget managers in meetings with the Budget Team. The Budget Team consists of all vice presidents and key budget staff from the Business Office. This group coordinates consideration of all budget requests and discusses any significant financial challenges/issues that may need communication to campus or consideration by the President and Board of Education.

New budget enhancements, along with departmental adjustments, are incorporated into the larger budget projection model and presented alongside the formal proposed budget document at the May Budget Committee meeting. This meeting includes both the Board of Education and appointed members of the public as prescribed by Oregon Budget Law. Finally, the Board of Education formally adopts the budget for the coming fiscal year in June.

At each point of discussion, updated projections and future variables are discussed and presented in the budget projection model. Applying key principles to the budget model insures financial stability for the college. The model illustrates the impact of expected financial results to the fund balance. If expected results bring the fund balance below the designated 10% level, then other financial variables must change. The Board of Education engages in discussion on revenue increases (tuition rates) vs. costs reductions. Regardless of the balance chosen between revenue and expense adjustments, the model demands deficit spending (if it occurs) is planned and limited to the established, minimum fund balance level. Additionally, the model allows for earmarking funds for budget enhancements even during periods of contraction. This mission-based budgeting allows for both increases and reductions in the budget to be made in strategic, targeted ways rather than across-the-board cuts or other broad, less-proactive budgetary responses.

2.E.3 Financial resources are managed transparently in accordance with policies approved by the institution’s governing board(s), governance structure(s), and applicable state and federal laws.

LBCC is subject to numerous state and federal laws in addition to its own Board Policies and Administrative Rules. An annual financial audit is conducted by independent auditors who ensure financial statements are compiled correctly. An annual [compliance audit](#) is also conducted to ensure grant funds are spent in accordance with applicable laws and grant regulations. LBCC is also required to follow state law and [CCRP \(Community College Rules of Procurement\)](#) in matters relating to purchasing and procurement. Adherence to these rules is audited along with other financial controls by the independent auditors.

The Governing Board is responsible for annual reviewing of Board Policies related to finance. [The 5000 Series of Board Policies and Administrative Rules](#) covers investment policy, cash handling, debt management, procurement rules and thresholds, allowable business expenses, and other fundamental financial functions and controls. College Council is responsible for recurring review of the associated Administrative Rules as well. Both Administrative Rules and Board Policies refer to the relevant Oregon Revised Statutes. These collective policies and rules are enforced throughout the Business Office by staff and management. For example, payment requests are approved and processed according to Administrative Rule requirements prior to actual payment. Staff not only ensure transactions and requests adhere to the above rules but also follow fundamental financial control best practices including separation of duties, secondary approvals, and account reconciliations. For example, new vendors created in the system are generated by a dedicated form initiated by staff external to the Business Office. The individual within the Business Office who processes the request and enters the new vendor in the system is not the individual who pays invoices through Accounts Payable. This general approach guides all processes throughout the financial systems of LBCC including the connection between Human Resources and Payroll.

2.F.1 Faculty, staff, and administrators are apprised of their conditions of employment, work assignments, rights and responsibilities, and criteria and procedures for evaluation, retention, promotion, and termination.

All of the above-referenced terms and conditions of employment for non-bargaining employees are contained within the Board of Education's [Policies and their Associated Administrative Rules](#). Human Resources Policies in particular are found in the [6000 series](#) of Board Policies and Administrative Rules. Policies and rules pertaining to teaching, scholarship and artistic creation may be found in the 4000 and 7000 series of Board Policies and Administrative Rules. Terms and Conditions of Employment for LBCC's represented employees are also contained in each bargaining unit's respective Collective Bargaining Agreements (CBAs). The Part-Time Faculty Association's CBA, Full-time Faculty CBA, and Independent Classified Association CBA may be viewed [here](#). Where CBAs are silent, Board Policies and Administrative Rules apply.

2.F.2 The institution provides faculty, staff, and administrators with appropriate opportunities and support for professional growth and development.

Faculty (full- and part-time), staff, and administrators are invited to Fall Inservice and training sessions held during the week between Inservice and the start of the fall term. Additionally, training opportunities for faculty (full- and part-time) are provided through the Center for Teaching Excellence at least once a month during the academic year. As needed or available, other training opportunities are held during the year, which are available to faculty, staff, and administrators.

Classified staff is eligible for up to \$2000 during a fixed, two-year period to use for professional development opportunities including tuition, conferences, and additional opportunities. Full-time faculty are eligible for up to \$4000 during a rolling two-year period for professional development opportunities, and part-time faculty are eligible for up to \$400 a year. Additionally, management, exempt staff, and confidential staff are eligible for up to \$600 a year for professional development opportunities. Anyone who wants to access professional development funds applies through a central form, and their application is sent to a committee made of peers to make a decision, or recommend a decision, on the application. [Further information](#) on eligible expenses for each group is found on the shared google drive, to which all employees have access.

2.F.3 Consistent with its mission, programs, and services, the institution employs faculty, staff, and administrators sufficient in role, number, and qualifications to achieve its

organizational responsibilities, educational objectives, establish and oversee academic policies, and ensure the integrity and continuity of its academic programs.

On an annual basis, aligned with our budgeting cycle, LBCC's Executive Team (consisting of the College's President, Vice-Presidents, Executive Director of Human Resources, Executive Director of Equity, Diversity, and Inclusion, and the Executive Director of College Advancement) evaluates staffing and recommends adding or reducing positions to ensure faculty, staff and management positions are "right-sized" to accomplish the organizational mission and strategic goals.

Documentation clarifying institutional expectations is communicated in several areas to ensure consistency of messaging. The college's [Mission Statement](#) highlights engagement as a key principle. Responsibilities for faculty and staff are documented in the individual position descriptions for each position. In addition, Full-time Faculty and Part-time Faculty have their specific responsibilities clarified in the workload articles of their respective collective bargaining agreements. Both Association's workload expectations are outlined in Article 8 of their respective bargaining agreements. These mutually agreed upon articles articulate fully what is expected in terms of faculty duties and responsibilities. In addition, Full-time Faculty engage in an annual work planning cycle where they collaborate with their division dean to clarify the specific teaching and other assignments they will engage in for the coming annual cycle. These workplans are submitted to the Office of Academic and Student Affairs each year.

Educational objectives for each individual faculty are bound up in the institution's core themes and strategic goals. These are filtered down from college leadership, and further communicated to staff in a manner specific to their positions via the management hierarchy, in the individual's work plans, and within the performance review and planning cycle.

Qualifications for each position are determined collaboratively by the hiring manager and the Human Resources Department, who set these individual qualifications based on the work outputs for individual positions and the qualification requirements of our accreditation body. LBCC has fully articulated expectations for recruitment and hiring processes in its various [Hiring Procedures and Resources](#) documents, which include a comprehensive hiring guide as well as help and resources for achieving best practices and equity in hiring.

LBCC maintains and publishes the [LBCC Organizational Charts](#) so all employees and students may be aware of Division and Department hierarchy and oversight. All contracted positions at LBCC are listed on the appropriate page of the organizational chart.

2.F.4 Faculty, staff, and administrators are evaluated regularly and systematically in alignment with institutional mission and goals, educational objectives, and policies and procedures. Evaluations are based on written criteria that are published, easily accessible, and clearly communicated. Evaluations are applied equitably, fairly, and consistently in

relation to responsibilities and duties. Personnel are assessed for effectiveness and are provided feedback and encouragement for improvement.

Performance review processes for classified employees are articulated in the [Classified Performance Review Processes and Resources](#). Performance review processes for Part-time Faculty are found in Article 17 of the [PTFA Collective Bargaining Agreement](#) and performance review processes for FT Faculty are referred to in the Full-time Faculty Contract and further articulated in the [Faculty Appraisal Handbook](#). The Management/Exempt and Confidential review process is described in this [document](#) and generally performed once a year.

2.G.1 Consistent with the nature of its educational programs and methods of delivery, and with a particular focus on equity and closure of equity gaps in achievement, the institution creates and maintains effective learning environments with appropriate programs and services to support student learning and success.

LBCC offers several services and programs to help with student success and close equity gaps.

[Learning Center](#)

- **Writing Center:** Coaching for all students for any writing project, in any class, and at any stage in the writing process. Lead staff are TESOL trained to assist ESL students.
- **Tutoring:** Provides free-of-charge trained student tutors for one-on-one tutoring. Also provides a class-based, embedded tutor in selected classes that have high failure rates. Group tutoring is available for selected classes.
- **Math Help Desk:** Drop-in help for all math classes is available in person and via zoom.
- **Math Cafe:** In-person drop-in math support focused on students in developmental math classes. Staff also create individualized math success plans for students who are struggling in their math class.
- **Academic Coaching:** Individualized coaching focused on academic skill development, time management, motivation and goal setting. Offers workshops on specific topics. Available generally and in the context of students managing learning or physical disabilities. Lead staff TESOL trained to assist ESL students. Particular focus on students on academic probation and suspension.
- **International Student Coaching:** Individualized one-on-one coaching for international students to help with academic struggles, cultural differences, and acquisition of the English language.
- **Physical Science Help Desk:** Drop in support for astronomy, geology, physics and chemistry courses available in person and via zoom.

[Library](#)

- **Student Tech Support (Student Help Desk):** Drop-in troubleshooting and tech support for computer issues. Also offers one-on-one digital literacy coaching.

- **Reference Support:** Reference librarians provide research assistance and help people with college processes, technology, and answers to all questions. Drop-in and by appointment.
- **Information Literacy:** Librarians collaborate with faculty to design research assignments and teach information literacy outcomes.
- **Library Collections:** The Library has a variety of special collections, including Spanish-language materials, Literacy Resources & Readers Collection, and technology available for checkout. You can search for specific items in the Library through the *Find It* search tool (which includes physical items and most digital collections) or the Library Catalog (which includes physical items and some ebooks).

[Center for Accessibility Resources](#)

- Works with students to plan classroom accommodations for students with disabilities. Supports faculty in implementing accommodations. Provides ongoing success coaching as needed for students with disabilities.
- **Testing Center:** provides alternative locations and accommodations for student testing, both for students with accommodations and without.
- **CARE Team:** a collaborative team including advising, counseling, accessibility, financial aid, public safety, and academic deans to collaboratively support students who have been identified as experiencing physical, financial, academic, mental health, personal crises, or unexpected life events that are impacting their ability to navigate school successfully.

[Student Advising](#)

- **Academic Advising:** Assigned advisors work with students on career development and educational planning.
- **Career Advising:** Trained staff work with students to explore majors and career options that would be a good fit, find ways to pay for educational goals, and assist with job search skills and employment opportunities.
- **Crisis Counseling:** Trained advisors are on call to provide crisis counseling and resource referral.

[First Resort](#)

- Student support and navigation center for both new and continuing students. Staff and student ambassadors support students through all parts of the educational journey, helping them understand and navigate complex college processes. Available in person, via zoom, and via LiveChat on the website.
- **Navigators:** Assigned student navigators use retention software to systemically connect and notice when students are struggling. Navigators check in with their caseload and send customized and tailored messages based on students' identified needs (identified via a support survey during onboarding) and observed behaviors (e.g. not registering on time, failing classes).
- **Affordability services:** Navigators trained to assist students experiencing financial hardship through resource referral and emergency grants and scholarships.

Student Conduct and Community Standards

- Provides support for faculty in all areas of conduct including avoiding academic dishonesty.
- Provides educationally-focused sanctions in cases of academic misconduct with the goal of helping students recover from mistakes and stay in college.
- Provides training to promote a safe learning environment for students, including drug and alcohol abuse training, sexual assault awareness and response, anti-hazing training, and Title IX awareness.

[STEP Program](#)

Offers SNAP participants an opportunity to get job training through LBCC's short-term certificate programs and certain AAS programs, allowing them to enter the workforce with the necessary skills to succeed in a fulfilling, family-wage career.

First Year Experience Program

Offers a First Year Seminar course to prepare students for success in college.

[University Partnerships Office Transfer Support](#)

- Offers one-on-one appointments for students to help them plan their transfer to another institution
- Organizes transfer fairs and info sessions and scholarship support.
- Maintains articulation agreements with partner universities and colleges to aid successful transfer.

2.G.2 The institution publishes in a catalog, or provides in a manner available to students and other stakeholders, current and accurate information that includes: institutional mission; admission requirements and procedures; grading policy; 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; names, titles, degrees held, and conferring institutions for administrators and full-time faculty; rules and regulations for conduct, rights, and responsibilities; tuition, fees, and other program costs; refund policies and procedures for students who withdraw from enrollment; opportunities and requirements for financial aid; and the academic calendar.

The LBCC catalog is a publication describing academic programs, student services, general regulations, requirements, and procedures. All requested information is included in the [catalog](#) (see areas listed below) and available on LBCC's webpage.

Institutional mission → Cover Page

Admission requirements and procedures → How to Get Started: Admissions, How to Get Started: Registration

Grading policy → Academic Information and Regulations → Grading System

Information on academic programs and courses → Degrees and Certificates, Courses
Names, titles, degrees held, and conferring institutions for administrators and full-time
faculty → Faculty and Administrative Staff
Rules and regulations for conduct, rights, and responsibilities → Academic Information
and Regulations → Students' Rights, Responsibilities, and Conduct
Tuition, fees, and other program costs → Tuition and Fees
Refund policies and procedures for students who withdraw from enrollment →
Academic Information and Regulations → Withdrawing from School, Tuition and Fees
Opportunities and requirements for financial aid → Financial Aid and Veterans
The academic calendar → General Catalog Information

2.G.3 Publications and other written materials that describe educational programs include accurate information on national and/or state legal eligibility requirements for licensure or entry into an occupation or profession for which education and training are offered. Descriptions of unique requirements for employment and advancement in the occupation or profession shall be included in such materials.

The healthcare occupations programs at LBCC each have a bulletin (with the exception of Coding and Reimbursement, which is open enrollment with no pre-admission requirements) that is published on the LBCC website, which includes information regarding eligibility requirements for licensure or entry into that occupation or profession, and the education/training needed. Most healthcare occupations fields require either certification or licensure for entry-level in the field (as noted in the bulletins). The bulletins provide additional information such as application deadlines, prerequisites, admission requirements, immunization and background check requirements, and outside LBCC accrediting or approval bodies.

Bulletins for our programs:

- [Dental Assistant Bulletin](#)
- [Diagnostic Imaging Bulletin](#)
- [Medical Assistant Bulletin](#)
- [Nursing Bulletin](#)
- [Nursing Assistant Bulletin](#)
- [Occupational Therapy Assistant Bulletin](#)
- [Phlebotomy Bulletin](#)
- [Sleep Technology Bulletin](#)
- [Surgical Technology Bulletin](#)

2.G.4 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.

LBCC Office of Financial Aid is committed to increasing opportunity and access to financial resources for students. This work is accomplished by educating students about [aid availability](#) and helping them navigate the necessary processes for gaining eligibility. The goal is to provide students with tools to fund their education using all forms of aid for which they qualify. Eligibility information about grants, loans, scholarships, student employment, and Veterans is published on the [college website](#). LBCC provides published materials advertising application dates, deadlines, and advice about aid options. This includes reminders about when to fill out the FAFSA and when to apply for scholarships. These materials are posted in student high-traffic areas in the form of posters, table tents, and brochures. LBCC also provides information on our website regarding application dates, deadlines, and advice about aid options.

The Office of Financial Aid provides multiple scholarship sources to students, including our own [Scholarship Opportunities webpage](#), as well as other sources at our Financial Aid Resources webpage. The LBCC Foundation provides over \$400,000 annually in scholarships to LBCC students.

2.G.5 Students receiving financial assistance are informed of any repayment obligations. The institution regularly monitors its student loan programs and publicizes the institution's loan default rate on its website.

Students receiving financial assistance are informed of any repayment obligations via the LBCC [Financial Aid Repayment](#) page, the [Disbursement Agreement form](#) (completed annually), official notifications via letter and/or emails for the [repayment of federal student aid](#) due to Return to Title IV calculation, as well as providing a [Student Loan Fact letter](#) to each student enrolled at LBCC who have received an educational loan. In addition, students must complete federally mandated entrance counseling, which details their debt obligation.

The institution regularly monitors its student loan programs by reviewing the School Financials and Operations dashboard from Federal Student Aid and through the reconciliation process. LBCC publicizes the institution's loan default rate via the LBCC [Cohort Default Rate](#) page.

2.G.6 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 and graduation requirements, and are adequately prepared to successfully fulfill their responsibilities. Advising requirements and responsibilities of advisors are defined, published, and made available to students.

All credit students are assigned an Academic Advisor and a Navigator upon their first term of registration. The Advisor and Navigator are the core members of each student's "Success Team." Most students are assigned an Advisor in the Advising Center; this group of faculty serve as general Advising professionals, and they specialize in career and major confirmation, problem-solving, coaching, and academic advising – generally through the first 2-3 terms of a student's tenure. After a student has reached a level of decidedness for their major and in concert with academic departments, students are assigned to program faculty advisors in the student's selected program for the remaining terms. The program faculty advisors are able to provide academic advising specific to the field and assist students with specific transfer or employment support that is distinctive to their chosen field. At all times, the Advising Center advisors remain available to all students to support academic advising needs, major changes, and other problem solving needs. For CTE programs in which a program faculty advisor is more appropriate upon entry, students are assigned to program faculty in those areas upon their first term. Academic Advisors are faculty positions. Advising Center faculty, in addition to providing direct advising to a caseload of students, also serve as Meta-Advisors; a Meta-Advisor is a designated Academic Advisor for each Meta group at the college. Meta-Advisors are tasked with connecting and communicating with program faculty and deans in the Meta and acting as a liaison and consultant for program faculty.

The Navigators serve as an unchanging “go-to” person for the student throughout their tenure at the college. They communicate directly to their caseload about key dates and benchmarks, they are available to the student for any and all college navigation and problem solving at the college, they monitor their caseload for alerts and behaviors that could be proactively addressed, they connect students with resources and interventions as needed, and they connect students with their academic advisors when appropriate and prudent. Navigators are classified staff positions and are available year-round for proactive, just-in-time, and on-demand student support.

Academic Advising is addressed in [Administrative Rule 4010-02](#), cited in the [Academic Catalog](#), and explained to students on the [Advising Center website](#).

The Advising Center undergoes a program review every two years; program review focuses on continuous improvement and goal setting for the next review cycle. Campus-wide advising is monitored and shepherded by the Campus Advising Committee, a committee composed of and led by faculty to guide advising initiatives, progress, training, and assessment. The Campus Advising Committee also advises on policies related to advising. The Campus Advising Committee created and maintains the Advisor Training Module in our LMS system, a self-guided learning module for all faculty advisors at LBCC.

Academic Advisors in the Advising Center are offered memberships to NACADA (National Academic Advising Association) annually, and most attend and engage in professional development annually (including, but not limited to, webinars, conferences, and workshops). The Advising Center faculty also offer advising training and development opportunities to fellow faculty at the college related to advising best practices.

2.G.7 The institution maintains an effective identity verification process for students enrolled in distance education courses and programs to establish that the student enrolled in such a course or program is the same person whose achievements are evaluated and credentialed. The institution ensures that 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.

The college utilizes a closed system ([LB Single Sign on](#)) that requires a username and password credentials to access the required web tools used at LBCC once a student is enrolled in a course. Students are required to set up or “claim” their single sign-on account by providing the following identifying information.

- Agreeing to the [SSO Acceptable Use Policy](#)
- Setting security questions
- Setting a new password
- Providing a SMS (Texting) phone number

Test proctoring for online courses is coordinated by each individual instructor. For a course(s) that requires in-person testing, test proctoring is coordinated and supported through Testing Services at the Albany campus. Local students generally test at one of our sites, which are located in Albany, Corvallis, Lebanon, and Sweet Home. Photo ID is required when testing at an LBCC testing site. Tests can be proctored for remote students in pre-approved testing centers nationally and worldwide. Generally, these centers also require a photo ID prior to testing or it is specifically put into the test proctoring directions/requirements from the instructor. Protocols for proctored testing at an LBCC testing site are outlined on the [Testing Services](#) website.

2.H.1 Consistent with its mission, the institution employs qualified personnel and provides access to library and information resources with a level of currency, depth, and breadth sufficient to support and sustain the institution’s mission, programs, and services.

Planning: Librarians meet weekly with the Library Director for both planning (short-and long-term) and operational decision-making. The entire library staff meets biweekly and also has longer planning retreats or training sessions once per term. They also aim to meet at least yearly with our Library Advisory Committee. The committee did not meet during the COVID closure, but was reconstituted in spring 2022 and will meet in the fall. A few outcomes of these practices include the program goals, program review, and instruction plan.

Collection Management: Librarians ensure the adequacy of library resources by following detailed procedures and professional guidelines as evidenced above. About every seven years, they do a collection analysis. As a result of the last analysis in 2015, the librarians

completely changed their acquisitions procedures. They began using an acquisitions module, changed the main book vendor, set up approval profiles, revamped the standing orders, and set up funds for each major subject area. These changes allowed more precision in spending of the collections budget, so that we could better align spending to usage, students in programs, and faculty teaching needs (one of the program goals). Work has just begun on the next collection analysis. The move to online instruction also prompted a recent overhaul of the Materials Selection Policy and the creation of detailed procedures for streaming video licensing. The collection management decisions are also informed by regular communication with faculty and administrators through liaison duties, committee meetings, etc.

Partnerships with faculty: Librarians regularly work with faculty in an attempt to assure that library and information resources are integrated into the learning process. Notable examples include:

- successful efforts to encourage faculty to adopt library ebooks in the place of expensive required textbooks,
- close collaboration with Anthropology faculty to update the Native American Studies collection,
- licensed videos incorporated into HDFs, Biology, History, Film, Adult Basic Skills, and various other courses, and
- ongoing collaboration with the Writing department to incorporate information literacy and library resource instruction into Writing courses.

Procedures for assessing adequacy of library collections and collection management guidelines

- [Collection Analysis Report](#)
- [Materials Selection Policy](#) [See also [BP 4025](#) and [AR 4025-01](#)]
- [Collection Development Resources](#)
- [Database Decision Matrix](#)
- [Weeding Guidelines & Weeding Schedule](#)
- [Video Licensing Procedures](#)

Library planning committee and procedures for planning

- [Library Advisory Committee](#)
- Program Review Report
- [Library Instruction plan](#)
- [Access Policy](#)
- [Circulation Policy](#)
- [Library Staffing Information](#)

Policies/procedures that explain faculty/library partnership for assuring library and information resources are integrated into the learning process:

- [Institutional Outcomes](#)
- [Liaison list](#) and [sample liaison duties](#)

2.1.1 Consistent with its mission, the institution creates and maintains physical facilities and technology infrastructure that are accessible, safe, secure, and sufficient in quantity and quality to ensure healthful learning and working environments that support and sustain the institution’s mission, academic programs, and services.

LBCC endeavors to keep our physical facilities accessible, safe, secure, and sufficient in quantity and quality for learning and working. Our [Facilities Master Plan](#) clarifies our policies and rules regarding the maintenance and use of our facilities. [Board Policy 5095](#) and the corresponding Administrative Rules further clarify the safety and security of our facilities. Additionally, LBCC ensures our [Technology Master Plan](#) is followed to maintain technology infrastructure that is accessible, secure, and sufficient. Academic Technology Committee and IT Governance evaluate requests for new technology use on campus to make sure it meets accessibility and security standards.

APPENDIX J: INSTITUTIONAL REPORT CERTIFICATION FORM

Please use this certification form for all institutional reports (Self-Evaluation, Annual, Mid-Cycle, PRFR, Evaluation of Institutional Effectiveness, Candidacy, Ad-Hoc, or Special)



Institutional Report Certification Form

On behalf of the Institution, I certify that:

- There was broad participation/review by the campus community in the preparation of this report.
- The Institution remains in compliance with NWCCU Eligibility Requirements.
- The Institution will continue to remain in compliance throughout the duration of the institution's cycle of accreditation.

I understand that information provided in this report may affect the continued Candidacy or Accreditation of my institution. I certify that the information and data provided in the report are true and correct to the best of my knowledge.

Linn-Benton Community College

(Name of Institution)

Dr. Lisa Avery

(Name of Chief Executive Officer)

(Signature of Chief Executive Officer)

9-14-2022

(Date)

Appendix

Documents linked in the report which are not available on Linn-Benton Community College's public facing website.



Lisa Avery, Ph.D.

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PROFESSIONAL EXPERIENCE

Campus President (2015 - Present) Portland Community College Sylvania

Portland Community College, Portland, OR: Portland Community College (PCC) is the largest institution of post-secondary education in Oregon, serving nearly 73,000 students (25,000 FTES in 2018-2019). The college serves more than two million residents in the metropolitan Portland area located in northwest Oregon with a \$508M total general fund budget; classes are delivered through four urban campuses and three workforce training centers as well as a variety of other community locations.

Sylvania Campus: PCC's first campus, Sylvania is located in Southwest Portland and is home to approximately 25,000 students per year and over 1200 faculty/staff. The 125-acre comprehensive campus includes 14 buildings and approximately one million square feet of facilities. Sylvania administration also oversees the Newberg Center, a facility serving rural Yamhill County.

President: Chief executive officer at large community college campus in Southwest Portland. Signature programs at Sylvania include Nursing, Dental Hygiene, MakerSpace, Automotive Technician, Machining, Pre-Engineering, and Visual/Performing Arts.

Activities and Accomplishments:

- oversee all Sylvania faculty and staff, as well as a \$94M biennial budget
- supervise targeted enrollment management and retention strategies for Sylvania students (25,000 headcount; 8500 FTES)
- serve as elected member of American Association of Community Colleges national board as an institutional representative
- testify in Oregon legislature on topics relevant to community college education, including budget, applied baccalaureate degrees, transfer and affordability
- represent the College and campus in a wide array of public interactions and community relations activities
- help lead major campus and district initiatives including Guided Pathways, Achieving the Dream and Advising Redesign

- initiate, develop and cultivate relationships with business, community and local political leaders, as well as a variety of public, private and community-based organizations to improve educational services for citizens and community understanding of the mission of the community college
- provide leadership for PCC's Newberg Center in rural Yamhill County, including work with Newberg's business community, legislators and industry partners
- serve on Oregon President's Council, the Oregon Student Success Steering Committee, Budget Planning Advisory Committee, Academic and Student Affairs Council, Campus Diversity Council (co-chair), and Sylvania Administrative Leadership Team
- lead "Net Zero" Sustainability initiative to reduce energy conservation
- expand high school and other community partnerships
- convene President's Council, a fundraising/friendraising community leadership contingent
- expand facilities, including new Child Development Center and Lab School
- advocate and plan for \$75M remodel of Health Technology Building
- lead efforts to increase enrollment, such as Friday Academy (targeted at working adults with some college and no degree)
- expand efforts to combat student hunger and homelessness through fundraising, advocacy and public awareness

Vice Provost for Strategic Partnerships (2013 - 2015)
Community Colleges of Spokane (CCS), Spokane, WA

Vice Provost serving community college district in Washington State. The district has a large service area, covering 12,300 square miles throughout six counties in Eastern Washington. District administration supports two separately accredited colleges, Spokane Community College and Spokane Falls Community College. \$90M district budget serves 26,343 students and employs approximately 2000 faculty and staff.

Responsible for leadership and innovation among with key business/industry/foundation partners in advancement of key elements of the CCS District Strategic Plan and in the development, enhancement and promotion of international exchange, study abroad as well as honors programs. Collaborated with CCS Foundation and local business/industry leadership to help build program awareness as well as to expand array of student internships, training opportunities and scholarship assistance.

Responded to media inquiries (including *Inside Higher Ed*, *Community College Week*, and others). Prepared key CCS materials for Clinton Global Initiative Commitment, American Association of Community Colleges, and Greater Spokane Incorporated.

Supported all facets of a public-private partnership to enable qualified students the opportunity to graduate and transfer to participating and highly selective universities. Led the development and delivery of self-support, competitive-admission instruction program to over 200 honors students in only 18 months.

Implemented global growth plan to involve regional recruitment of international students from high-priority markets to increase diversity, generate revenue, and expand educational offerings to international students. Grew international revenue to over \$1.2M in AY 2013-14, exceeding target by over 15%, winning Institute of International Education Heiskell Award Honorable Mention (2015) for globalization efforts. Oversight of multiple, complex state and self-support budgets.

Dean, Global Education and Honors (2012-2013)
Community Colleges of Spokane (CCS), Spokane, WA

After major reorganization of administrative services, guided all aspects of CCS international and honors programming. Provided leadership to high-priority emerging programs within community college district.

Chief international officer serving growing, diverse group of international students throughout 12,300 square-mile college district. Supervised implementation of reorganization of global education, along with establishing a pilot, public-private honors program which was the first of its kind among U.S. community colleges. Led all curricular, admissions, and program implementation efforts during program launch, including extensive work with faculty on honors rigor and qualifications for honors admission. Created and implemented *CCS Global Vision* involving academic excellence, diversity, partnership, global awareness and revenue.

Grew international enrollment and expanded funded international programs. Participated in accreditation planning, including components of self-study. Oversaw all U.S. Department of State visa compliance for international students. Helped in all phases with creation of new academic ESL program at Spokane Community College. Generated \$800,000 in self-support tuition revenue during 2012-2013.

Coordinated comprehensive student services for international and honors students, including admissions, recruitment, financial aid liaison, registration and course scheduling, orientation, data systems, tuition and billing, technology support, advising and counseling linkages, budget and invoicing.

Oversaw student services for international students: recruitment, recruiting budget, agents, four-year partners, ESL programs, attendance, SEVIS and all visa, designated school officials, embassies, sponsored students, grant proposals, academic success, health and mental health.

Dean, Social Sciences, Human Services, Accounting & Economics and Academic Initiatives
(2010-2012, interim 2010-2011)
Spokane Falls Community College, Spokane, WA

Provided academic leadership to a large and complex division including transfer and career-technical education programs. Oversaw \$2.8M dollar budget with 43 FTE faculty; administered extensive online and face-to-face transfer and career/technical instructional programs in Social Sciences, Accounting & Economics (11 disciplines) and Human Services (Addiction Studies, Early Childhood Education,

Education, Education Paraprofessional, Gerontology, Interpreter Training, Library and Information Services, and Social Services Assistant). Led academic service learning efforts on behalf of the college and in collaboration with numerous local social service agencies.

Developed grant proposals to help generate non-state funding and add to array of services and programs offered to students. Built and strengthened student success activities and partnerships, including: Achieving the Dream, AmeriCorps VISTA, Honors Task Force, Chemical Dependency Prevention/DSHS, WA SBCTC Pre-College Transformation, Welty Endowment – Diversity Education Partnership. Successfully coordinated Center for Service Learning and Community Engagement, including selection to President’s Higher Education Community Service Honor Roll (2012).

**Associate Dean (interim), School of Social Work and Human Services (2008 - 2010)
Eastern Washington University, Cheney, WA**

Served as key leadership team member for this college during a difficult time of budget reductions and university restructuring. Led budget reduction efforts (13% cut to state allocation) which resulted in no job loss and similar FTES generation. Coordinated enrollment management and planning for delivery of complex, multi-site undergraduate and graduate programs in Africana Education, Chicano Education, Native American Studies, Addiction Studies, Social Work, and Aging Studies. Supervised implementation and renewal of DSHS Child Welfare Training grant. Taught courses to help offset budget reduction.

Coordinated delivery and budget for rural education programs located at Clark College, Columbia Basin Community College, Everett Community College, and Yakima Valley Community College.

TEACHING EXPERIENCE

**Professor, School of Social Work and Human Services (2006 - 2010)
Eastern Washington University, Cheney, WA**

Full professor in School of Social Work and Human Services, including leadership of faculty personnel committee and research course sequence. Lead instructor in Quantitative Data Analysis, Applied Research, and Survey of Research Methods. Earned early promotion at two levels due to exceeding all goals/milestones ahead of standard promotion and tenure timelines.

Led highly-successful, self-supported study abroad course in Jamaica for ten years, with emphasis on service learning, community development, and global social policy.

Provided full-time classroom instruction in undergraduate and graduate social work courses, including Research Methods, Data Analysis, Applied Research Projects, Human Development, Human Diversity, and Global Social Development.

Served as a member of key national committees in discipline area (e.g., Council on Social Work Global Commission, 2005-2011) and developed a strong track record of scholarship, external funding, community/university service and collaboration. (On leave 2008-2010 to serve as interim Associate Dean).

**Associate Professor, School of Social Work and Human Services (2003 - 2006)
Eastern Washington University, Cheney, WA**

Tenured faculty member and involved campus member. Expanded School of Social Work Global programming, including increasing participation in study abroad and successful State Department grants for Chilean pre-service teachers and European student leaders. Chaired admissions, personnel, and curriculum sequence committees.

Participated in several university-wide leadership efforts, including Collective Bargaining Rejoinder, NWCCU Accreditation Planning Team, PRIDE Center and other diversity initiatives, and enrollment management.

**Assistant Professor, School of Social Work and Human Services (2000 - 2003)
Eastern Washington University, Cheney, WA**

Tenure-track faculty member with excellent teaching evaluations and demonstrated track record of scholarly productivity. Taught courses in research, practice, diversity, human development, family violence, and juvenile justice. Record of outstanding service to the department, college and university, including key committee leadership positions.

**Assistant Professor, School of Social Work (1998 - 2000)
University of Southern Mississippi, Hattiesburg, MS**

As a new tenure-track faculty member, delivered courses in Research Methods, Social Work Practice, Human Behavior and the Social Environment. Used distance learning to offer courses on Gulf Park campus simultaneously with main campus classes. Chaired admissions committee and graduate research sequence.

RESEARCH ASSOCIATE EXPERIENCE**Project Coordinator, Chicago Youth Development Study (1997 - 1998)**
University of Illinois at Chicago, Department of Psychiatry

Managed data collection for large, SAMHSA-funded longitudinal study of factors related to youth violence. Hired, trained and supervised a team of 40 interviewers who conducted community-based data collection. Coordinated data collection among incarcerated participants.

Project Coordinator, Non-Offending Parents Project (1994-1997)
University of Illinois at Chicago, Jane Addams College of Social Work

Supervised data collection, entry and analysis for longitudinal study of family factors related to child sexual abuse. Funded by NICHD, this clinical study used qualitative and quantitative methods of data collection, including interviews of sexually abused children and non-offending parents.

EDUCATION**Ph.D., Social Work**

University of Illinois at Chicago

Master of Social Work

University of Illinois at Chicago

Bachelor of Science, Psychology

Ball State University

SELECTED COMMUNITY ACTIVITIES

- Neighborhood House Board of Directors (Portland, OR; 2015-2018)
- Volunteer Coach, Southwest Portland Little League
- Board member, Windgate Homeowners Association
- CCS Foundation Gala Fundraiser Planning Committee
- Board of Directors, Odyssey Center for LGBTQ Youth
- Table Captain, Women Helping Women Fund
- Early Head Start Governing Board – Eastern Washington
- Member, Board of Directors, Spokane Child Abuse/Neglect Center
- Licensed Washington foster parent (2001-2005)

AWARDS AND PROGRAM RECOGNITION

- Andrew Heiskell Award for Innovation in International Education. Internationalizing the Community College: Honorable Mention for Spokane Falls Community College *2020 Global Vision*. Awards sponsored by the Institute for International Education.
- Vanessa Behan Crisis Nursery: Special Recognition for Research and Evaluation Assistance.
- Jamaican Child Development Agency: Special Partnership Award Certificate.

SELECTED TRAINING AND LEADERSHIP DEVELOPMENT

- FEMA Emergency Planning for Campus Executives (2019)
- American Association of Community Colleges:
 - Future Leaders Institute (2012)
 - Advocates in Action (2018, 2019)
 - Joint Convening with American Association of School Administrators (2017, 2018)
- American Association of Community College Trustees:
 - National Legislative Summit (2017, 2018)
 - Advocacy Leadership Academy (2018)
- #RealCollege (2017, 2019)
- Council on Foreign Relations (2017, 2018)
- Minority Serving Institutions Convening (2018)
- National Council on Race and Ethnicity (2018)
- Oregon Campus Compact Executive Learning Series on Equity and Empowerment (2015)
- National Academic Advising Association Academic Advising Institute (2012)

SELECTED PROFESSIONAL ACTIVITIES - NATIONAL

- Elected national board member, American Association of Community Colleges (2018-2021)
 - Chair, Commission on Public Relations, Advocacy and Advancement (2019-2020)
 - Member, Committee on Public Policies and Government Relations (2018-2019)
 - Co-chair, Global Education Commission (2018-2019)
 - Member, Guided Pathways Commission (2015-2018)
- Member, College Board Community College Advisory Panel (2019-2021)
- Community College Sector Representative, National Campus Well-Being Initiative Advisory Council (2019-present)
- Reviewer, *Violence Against Women Journal* (2018-present)
- Evaluator/Site Visitor, Northwest Commission on Colleges and Universities (2013-present)
- Member, Oregon Student Success Center Steering Committee (2017-present)
- Member, Portland Board of Transportation Steering Committee (2015-2017)
- Delegate, Washington Governor's Trade Mission to China (2013)

- Selection Panelist, Gilman Scholarship (2011-2014)
- Council for Social Work Education Annual Program Meeting Regional Planning Committee (2006-2007)
- Council for Social Work Education Commission on Global Education (2002-2008)
- Member, CSWE Partners for International Education Review Committee (2004-2007)
- Reviewer, CSWE International Proposals Track – Annual Program Meeting (2007)
- Liaison, “Partners of the Americas” Chile/Washington Embassy Exchange Program (2007-2009)
- Member, Mukogawa/Spokane Academic Research Institute Board of Directors (2010-2012)
- Editorial Board Member, *Journal of Youth and Adolescence* (1998-2004)

EXTERNAL REVIEWER

- University of Namibia (Windhoek, Namibia) graduate student research project reviewer (2018)
- University of Southern Mississippi (Hattiesburg, MS) faculty promotion committee (2018)
- Zayed University (Dubai, United Arab Emirates) faculty promotion committee (2017)

SELECTED COMMITTEE ACTIVITIES

Portland Community College/Sylvania Campus

- Member, Portland Community College District Cabinet
- Co-chair, Sylvania Diversity & Equity Committee
- Member, College Budget and Planning Committee
- Member, Campus Safety Committee
- President’s Representative, Academic/Student Affairs Council
- Chair, Campus Climate Planning Group
- Member, YESS to Equitable Student Success Steering Committee
- Co-chair, Sylvania Administrative Leadership Team
- Member, Internationalization Steering Committee

Spokane Falls Community College / Community Colleges of Spokane

- SFCC Presidential Search: Screening Committee
- Chancellor’s Revenue Generation Work Group
- Director of Institutional Effectiveness/Research Screening Committee
- State Board Transforming Pre-College Education Work Group
- Foundation Gala Fundraiser Event Committee
- Sister Cities Representative
- SFCC Grant Proposal Work Group: Gateway to College National Network
- SFCC International Education Committee
- Honors Curriculum Task Force
- Honors Admissions Committee
- Deans and Chairs Council

- Administrative Council
- Instructional Administrators Council
- Accreditation Executive Steering Committee
- Accreditation Core Theme Team
- Diversity and Equity Task Force
- Institutional Teaching and Learning Improvement Coordinating Committee
- All-College Learning Community
- Chair, Faculty Search Committees (Sociology, Economics and Psychology)
- Chair, Tenure Review Committees
- Study Abroad Advisory Committee
- Washington Campus Compact (Service Learning)
- SCC Global Studies Committee

Eastern Washington University

- University Accreditation Committee
- Administration/Faculty Collective Bargaining Rejoinder Task Force
- President's Task Force on LGBT Campus Climate
- Provost's Council
- Study Abroad Course Selection Committee
- International Scholar Learning Community
- Washington Child Welfare Disproportionality Task Force
- Research and Creative Works Symposium Committee
- Washington Child Welfare Training & Advancement Program Advisory Board
- Mentor, Washington Achievers Program
- Mentor, McNair Scholars Program
- Chair, Social Work Personnel Committee
- Social Work Undergraduate Committee
- Chair and Co-Chair, Social Work Admissions Committee
- Faculty Advisor, Graduate Student Social Work Organization
- Faculty Advisor, Undergraduate Student Social Work Organization
- Union Steward, School of Social Work
- Dean's Consultative Committee

TESTIMONY/LEGISLATIVE HEARINGS

- Oregon Senate Bill 3 - Community College Baccalaureate Degrees (2019)
- Oregon House Bill 2998 - Community College Transfer Bill (2017)
- Oregon Capital Construction Hearing (2017, 2018)
- Oregon Ways and Means Road Show (2017, 2019)
- Washington Higher Education Subcommittee (2013)

SELECTED PRESENTATIONS

Avery, L. & Baguiao, C. (2019, October). Using campus communications to expand leadership approaches and opportunities. American Association for Women in Community Colleges National Conference, San Antonio, TX.

Avery, L. (2019, July). The role of colleges and universities in bridging economic reconciliation with tribes: Presidents roundtable. Pacific Northwest Economic Region Summit, Saskatchewan, CA.

Avery, L., Gaba, B., & Atwater, L. (2019, July). Managing personnel in tough times and in declining enrollments. Panel presentation, Presidents Academy Summer Institute, Atlanta, GA.

Avery, L. (2019, July). Applied Baccalaureate degrees in Oregon. Roundtable Discussion, Jobs for the Future Postsecondary State Network Meeting, Fort Lauderdale, FL.

Avery, L. (2019, May). Culturally responsive teaching. Board of Directors, Portland Community College, Portland, OR.

Avery, L. & Baguiao, C. (2019, February). Leadership and Communication: Trends and Innovations. League for Innovation in the Community College Annual Conference, New York, NY.

Avery, L. (2018, October). Building a healthcare talent pipeline. Oregon Workforce and Talent Board, Portland, OR.

Avery, L., Baston, M. & Lopez, I. (2019, September). What new presidents wish they had known: Key leadership lessons. Panel presentation, AACC Future President's Institute, Washington, DC.

Avery, L. (2018, July). Leadership pathways: Gender and social class issues. Oregon Institute for Leadership Development, Silver Falls, OR.

Avery, L. (2018, June). Paths to the presidency. Oregon Executive Leadership Academy panel presentation, Silverton, OR.

Avery, L. (2017, February). Prioritizing the Needs of Higher Education in Oregon: The State's Role in Changing Times. League of Women Voters Higher Education Leaders Panel, Portland, OR.

Avery, L. (2017, May). Keynote Address: PCC Pride Center Dedication Ceremony and Employee Recognition. Portland, OR.

Avery, L., Edwards, K., Fowler-Hill, S., & Howard, J. (2016, November). Early Access Leads to Future Success. Presented at the Oregon Community College Association 2016 Annual Conference, Sunriver, OR.

Avery, L., Edwards, K., Fowler-Hill, S., & Howard, J. (2016, October). Bridging the Leadership Gap: Challenges and Opportunities of Mentorship. Panel discussion at the American Association of Women in Community Colleges National Conference, Portland, OR.

Avery, L., Spilde, M., Cox-Brand, E., Hull, J. (2016, February). Convening the State: Panel Discussion with Davis Jenkins, Statewide Convening on Guided Pathways, Lane Community College, Eugene, OR.

Avery, L., (2016, May). Guided Pathways and Career Options, Meeting of State Career Pathways staff, Oregon Garden, Silverton, OR.

Avery, L., Edwards, K., Fowler-Hill, S., & Howard, J. (2015, November). From Affirmative Action to Critical Race Theory: One college's journey to creating a more socially just education environment. Panel discussion at the Oregon Community College Association Annual Conference, Newport, OR.

Avery, L. (2015, October). Educational Journey - First Generation Student to Community College President. American Association of Women in Community Colleges, PCC Chapter.

Avery, L. (2015, May). Keynote address: Internationalizing the Community College. NAFSA Annual Meeting, Community College Interest Group Seminar, Boston, MA.

Johnson, C., Avery, L., Piper, B., & Cosentino, R. (2014, April). 21st-century innovation: Public-private honors partnership for student success. Paper presented at the American Association of Community Colleges, Washington, D.C.

Avery, L., Bronner, P., Johnson, C. & Piper, B. (2013, October). Moving the needle through public-private partnerships: Case study and board perspectives. Paper presented at the Association of Community College Trustees, Seattle, WA.

Avery, L. & Bender, S. (2013, October). Inland Northwest partnerships: Strategies for success. Paper presented at the NAFSA – Association of International Educators, Region I Conference, Spokane, WA.

Avery, L. (2012, February). Academic support services for pre-college students. Paper presented at the Washington State Board for Community and Technical Colleges - Pre-college work group panel presentation, Federal Way, WA.

Petrie, G.M., & Avery, L. (2010, November). Identifying teachers' approaches to language technologies: Towards better professional development. Paper presented at the American Council of Foreign Language Teachers, Boston, MA.

Ritchie, D., Avery, L. & Mama, R. (2010, April). Globalizing the perspective and curriculum of BSW programs in the USA. Paper presented at annual meeting of Baccalaureate Program Directors, Atlanta, GA.

Petrie, G.M., Lordan, P. & Avery, L. (2009, May). Where replication ends and sustainability begins: A Chilean case study of the use of U.S.-exported technologies to teach English. Paper presented at the International Association for Technology, Education and Development Conference, Barcelona, Spain.

Mathbor, G., Avery, L. & Onolemhemen, D. (2008, November). Global social work: Town hall meeting on climate change, poverty and refugee issues. Paper presented at the Council on Social Work Education Annual Program Meeting, Philadelphia, PA.

Avery, L. (2008, May). Global experiences – Jamaican service learning. Paper presented at the Eastern Washington University International Speaker Series, Cheney, WA.

Avery, L., Mama, R. & Ritchie, D. (2008, March). Internationalizing the curriculum – Social work and beyond. Paper presented at the Baccalaureate Program Directors Annual Conference, Destin, FL.

Avery, L., Rehner, T. & Matthews, J.D. (2007, July). Outcomes of caregiver interruption among Jamaican youth. Poster presented at the International Consortium for Social Development (ICSD) Symposium, Hong Kong.

Matthews, J.D. & Avery, L. (2007, May). Meeting of the minds: Challenges and rewards of integrating community-based research projects into a graduate social work curriculum. Paper presented at the Hawaii International Social Sciences Conference, Honolulu, HI.

Ritchie, D., Mama, R. & Avery, L. (2005, November). Being global without leaving the country. Paper presented at the Baccalaureate Program Directors Annual Conference, Austin, TX.

APPROVED STUDENT SPONSORSHIP PROPOSALS

Avery, L. (2015). Proposal to host students from Pakistan, Kosovo and Tunisia through Global Undergraduate Program. Sponsored by IREX/United States Department of State, Bureau of Cultural and Educational Affairs.

Avery, L. & Blizzard, A. (2014). Proposal to host students sponsored by Brazil Scientific Mobility Program for SCC and SFCC STEM and Academic ESL programs.

Avery, L. (2014). Proposal to host Tunisian career technical education students sponsored by IREX/United States Department of State Thomas Jefferson Community College Scholarship Program. Hosting students in STEM programs at SFCC AY 2014-15.

Avery, L. (2013). Proposal to host Tunisian career technical education students sponsored by IREX/United States Department of State Thomas Jefferson Community College Scholarship Program. Hosted students in Electronics and Information Technology at SCC AY 2013-14.

SELECTED GRANT AND PROGRAM PROPOSALS

Matthews, J.D., Nashandi, J. & Avery, L. (2016-2017). Expatriate student adjustment in Dubai, Windhoek and Portland: A mixed-methods study. Funded by Zayed University, United Arab Emirates. Amount funded: \$150,000.

Avery, L., Wilson, S. & McNeese, L. (2014). USAID Afghan Partnership Program. University Support and Workforce Development Program in Afghanistan Biomedical Engineering Technology Training and Development Program at Kabul Medical University. Amount subcontracted: \$500,000.

Blizzard, A. & Avery, L. (2014). Fulbright Scholar-in-Residence proposal for Spokane Community College. Council for the International Exchange of Scholars. Proposal for Brazilian or Costa Rican social scientist guest faculty member (2015-2016). Amount funded: Annual salary/expenses for faculty exchange.

Praeger, P. & Avery, L. (2010). Achieving the Dream: Community Colleges Count. Washington State Board for Community and Technical Colleges/Achieving the Dream. Amount funded: \$250,000.

Avery, L. (2010). Fulbright Scholar-in-Residence proposal for Spokane Falls Community College. Council for the International Exchange of Scholars. Proposal for Zambian or Ghanian social scientist guest faculty member (2011-2012). Amount funded: Annual salary/expenses for faculty exchange.

Avery, L. & Mohr, J. (2010). Bridging Worlds to Meet Our Region's Social and Economic Needs: SFCC and IEL Diversity Education Partnership. Welty Endowment for Systematic Program and Professional Development, Community Colleges of Spokane Foundation. Amount funded: \$50,000.

Avery, L. & Petrie, G. (2010). Pathways Institute: European Teacher Training Project - Years 1-3. U.S. Department of State - Bureau of Educational and Cultural Affairs. Amount funded: \$372,928.

Avery, L. & Neace, J. (2009). Needs Assessment for EWU Baccalaureate Degree Program for Low-Income Residents of Lower Yakima Valley. College SPARK Washington. Amount funded: \$50,000.

Avery, L. & Perez, S.J. (2008). Chilean EFL Teacher Training Project (ChileTeach). U.S. Department of State - Bureau of Educational and Cultural Affairs. Amount funded: \$248,000.

PUBLICATIONS

- Matthews, J.D., Nashandi, J., & Avery, L. (2018). Southern African social work students' acceptance of rape myths. *Social Sciences*, 7(9), 1-11.
- Matthews, J.D., Clemons, K., & Avery, L. (2017). Social work students' attitudes towards gay men and lesbians in Namibia: Results from an exploratory study. *South African Journal of Higher Education*, 31(4), 286-306.
- Avery, L. (2014). Public-private honors success at Community Colleges of Spokane. *Journal of the National Collegiate Honors Council*, 15 (1), 35-40.
- Petrie, G.M., Avery, L., Lordan, P. & Ruiz-Rubio, N. (2014). Importación o contextualización de las nuevas tecnologías en la enseñanza del inglés: un caso de estudio de un docente chileno. *Revista Interamericana de Educación de Adultos*.
- Petrie, G.M. & Avery, L. (2011). Identifying our approaches to language technologies: Towards better professional development. *English Language Forum*, 49, 10-19.
- Petrie, G.M., Lordan, P. & Avery, L. (2009). Where replication ends and sustainability begins: A Chilean case study of the use of U.S.-exported technologies to teach English. *Proceedings of the International Association for Technology, Education and Development Conference*.
- Avery, L. & Davis, D.R. (2008). Women's recovery from compulsive gambling: Formal and informal supports. *Journal of Social Work and the Addictions*, 8(2), 171-191.
- Avery, L., Hoffman, K., Powell, B., Cooper, G. & Matthews, J. (2008). Project Same Page: Evaluation of an attachment training program. *Journal of Public Child Welfare*, 2(4), 495-510.
- Elliott-Hart, F., Avery, L. & Rehner, T. (2006). Outcomes of caregiver interruption among Jamaican youth. *Caribbean Journal of Social Work*, 5, 89-102.
- Gamache, S., Mirabell, D. & Avery, L. (2006). Early childhood developmental and nutritional training for foster parents. *Child and Adolescent Social Work Journal*, 23(5-6), 501-511.
- Davis, D.R. & Avery, L. (2004). Women and compulsive gambling: Results from an online survey. *Journal of Social Work and the Addictions*, 4(1), 61-80.
- Folsom, W., Christensen, M., Avery, L. & Moore, C.D. (2004). The co-occurrence of child abuse and domestic violence: An issue of service delivery for social service professionals. *Child and Adolescent Social Work Journal*, 20(5), 375-387.

Moore, C., Sparr, J., Sherman, S., & Avery, L. (2004). Surrogate decision-making: Judgment standard preferences of older adults. *Social Work in Health Care, 37*(2), 1-16.

Avery, L., Hutchinson, K.D., & Whitaker, K. (2002). Domestic violence and intergenerational rates of child sexual abuse: A case record analysis. *Child and Adolescent Social Work Journal, 19*(1), 77-90.

Salloum, A.A., Avery, L., & McClain, R.P. (2001). Adolescent survivors of homicide victims: Effectiveness of a group therapy model. *Journal of the American Academy of Child and Adolescent Psychotherapy, 40*(11), 1261-1267.

Avery, L., Massat, C.R., & Lundy, M. (2000). Posttraumatic stress and mental health functioning of sexually abused children. *Child and Adolescent Social Work Journal, 17*(1), 19-34.

Gorman-Smith, D. & Avery, L. (1999). Family factors and youth violence. In D.J. Flannery and C.R. Hiff (Eds.) *Youth Violence: Prevention, Intervention, and Social Policy*. Washington, D.C.: American Psychiatric Press.

Avery, L. (1998). A feminist perspective on group work with severely mentally ill women. *Women and Therapy, 21*(4), 1-14.

Avery, L., Massat, C.R., & Lundy, M. (1998). The relationship between parent and child reports of parental supportiveness and psychopathology of sexually abused children. *Child and Adolescent Social Work Journal, 15*(3), 187-205.

Hughes, T.L., Haas, A.P. & Avery, L. (1997). Lesbians and mental health: Preliminary results from the Chicago Women's Health Survey. *Journal of Gay and Lesbian American Medical Association, 1*(3), 137-148.

PROFESSIONAL MEMBERSHIPS

- American Association of Community Colleges
- League for Innovation in the Community College
- American Association for Women in Community Colleges
- NAFSA: Association of International Educators
- LGBTQ Leaders in Higher Education

Ann M. Malosh

1887 NW Lantana Drive
Corvallis, Oregon 97330

Home: 541-757-9548
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Cell: 541-602-1409

Leadership Skills, Strengths, Qualifications:

- Strong leadership, communication, and student/institutional advocacy skills.
- Strong partnerships with business, industry, and government agencies.
- Experience in program design/direction, presentation, training, management, and human relations to provide high-quality, effective, relevant training and development.
- Skilled with increasing revenue and obtaining grant funding.
- Expertise in learning outcomes, learning theory, listening skills, questioning techniques, discussion leading, and generating enthusiasm/motivation.
- Skilled in incorporating data-driven decision-making.
- Successful in strategic marketing and operational plans to increase enrollment, enhance the student/client experience, and strengthen college program offerings.
- Experience with facilities construction and renovation.

Education:

Doctor of Education, In Progress, Projected Dissertation Defense, Winter 2012
Emphasis in Community College Leadership

Oregon State University, Corvallis, Oregon

Dissertation Topic: The Involvement of Career and Technical Education Advisory Committees in Modularizing Curriculum

Master of Education, 1989

The University of Toledo, Toledo, Ohio

Bachelor of Education, Magna Cum Laude, 1984

The University of Toledo, Toledo, Ohio

Elementary Education Teaching Certification

Ohio and Oregon

Professional Experience:

Dean, Business, Healthcare, and Workforce

2008 to present

Dean, Healthcare Occupations and Workforce Education

2006 to 2008

Dean, Workforce Education and Training

2003 to 2006

Linn-Benton Community College

(Representative of three division re-organizations)

Supervise the following departments: Nursing, Nursing Assistant, Emergency Management Technician, Dental Assisting and Dental Hygiene, Occupational Therapy Assistant, Diagnostic Imaging, Medical Assisting, Business Technology, Business Management, Business and Employer Services, Accelerated/Short Term Training, Job Opportunity and Basic Skills (JOBS) Program, Turning Point and Transitions, Health Occupations Services, and the Workforce Development Network. Provide leadership in health occupations, business and industry needs, pathways development, and workforce education for the college. Administer all aspects of curricular offerings, including course and program approval. Provide leadership in the development of new programs and innovative instructional approaches, including distance education. Manage numerous sources of revenue, including general fund budgets, contracted training accounts, grants, and auxiliary accounts. Pursue and develop new funding resources for the college. Provide leadership in the definition and accomplishment of division goals and objectives. Facilitate positive communications within the division and ensure effective partnerships with other college instructional and service areas. Represent the college to external constituencies

and be a constant ambassador in the community. Serve on a variety of community college, state-wide, and national committees and councils.

Key Accomplishments:

- Successfully launched the Interprofessional Education (IPE) course in partnership with Oregon State University and Western University: COMP Northwest. This is the only medical school, university, and community college IPE partnership in the nation.
- Began the state-wide Distance Education Diagnostic Imaging and Occupational Therapy Assistant Programs.
- Partnered with four other Oregon community colleges to begin the state-wide Oregon Pathways Initiative.
- Won the Bellwether Award for workforce education innovation in 2009.
- Launched the Community College Healthcare Education Alliance (CCEHA), bringing all seventeen community college healthcare deans together for a collaborative approach to solving the Oregon healthcare workforce shortage.
- Secured donations and grants totaling over five million dollars.
- Guided the Dental, Nursing, Occupational Therapy Assistant, and Polysomnography programs through successful accreditation visits.
- Established groundwork for the distance-learning healthcare consortium.

Program Chair/Training Specialist

1998 to 2003

Training and Business Development Center (TBDC) – Linn-Benton Community College

Managed the Short-Term Training and Professional Development Programs. Worked closely with business and industry to assess training needs. Developed and implemented cost recovery instructional programs. Recruited, hired, mentored, and managed part-time faculty, contracted classified, and instructional assistants. Managed the occupational skills budget and various grants associated with short-term training. Responsible for obtaining state approval of short-term trainings, developing course outlines, and establishing program prerequisites. Developed program outcomes for all state-approved short-term trainings. Collaborated with the Director of Financial Aid and the Director of Admissions to establish special admissions status and program eligibility for financial aid. Developed internal and external marketing and promotional strategies. Facilitated all short-term training advisory committees. Advised students and taught customer service skills course. Supervised the TBDC front office staff.

Key Accomplishments:

- Created seven state-approved certificate programs: Pharmacy Technician, Veterinary Technology, Phlebotomy, Basic Computer Support, Medical Unit Secretary, Radiologic Technology, and Public Safety Dispatcher.
- In partnership with the Director of Financial Aid, established LBCC as the only community college at the time to offer financial aid to programs of less than one year.
- Partnered with Samaritan Health Services to establish the Health Career Center at Lebanon Hospital for current and future medical trainings.
- Worked with the Director of Admissions and the Instructional Standards Committee to institute special admissions status for all short-term training programs.
- Successfully partnered with the Business Technology Division and the Engineering & Industrial Division to create the Welding, Machine Tool, and Basic Computer Support Short-Term Trainings.

Instructor/Coordinator

1993 to 1998

Training and Business Development Center – Linn-Benton Community College

Researched and developed the Value-Added Manufacturing Training (VAM). Managed the promotion, planning, delivery and evaluation of the VAM and co-managed the JOBS Electronics Manufacturing Skills Training (JEMS). Responsible for developing and teaching workplace communication and math to support and correlate with other classes in intensive, seven-week trainings to meet local manufacturing skills standards.

Key Accomplishments:

- Job placement rate of 97% for program graduates.
- VAM curriculum acquired and used by two other Oregon educational programs.
- Successfully embedded adult basic skills into Career and Technical Education programs.

Basic Skills Instructor**1991 to 1998**

JOBS Program – Linn-Benton Community College

Worked with area employers to create workforce curriculum. Taught basic skills for students preparing to enter the workforce. Prepared students to take all five GED tests. Planned and implemented the biannual GED graduation at Linn-Benton Community College. Published the JOBS program newsletter.

Key Accomplishments:

- 85% of students enrolled in Basic Skills classes passed the GED.
- Authored the math and writing components of *Workforce 2000*, a workforce basic skills training manual.

Teacher

Various Teaching Experience

1984 to 1991

Taught adults in ABE/GED programs at St. Mary's Soup Kitchen, Linn County jail, and Benton County jail, representing Linn-Benton Community College. Taught grammar and composition to junior high school students in Toledo, Ohio. Taught grades 4-5 in a self-contained classroom in Monroe, Oregon.

Professional Publications and Presentations:

Malosh, A. (2009) *Going the Distance, Take a Diagnostic Imaging Program to Frontier and Rural Oregon*, Community College Journal of Research and Practice.

Workforce 2000 (a training program for students entering the workforce).

Presented workforce education topics:

- Community College Futures Assembly 2007, 2009, 2010
- National Council of Workforce Education 2007, 2008, 2009
- Oregon Association of Career and Technical Education 2009
- Workforce Innovation Conference 2007
- LBCC Opportunities Conference 2001, 2002
- Oregon State University Veterinary Medicine Continuing Education Conference 2000, 2001, 2002, 2003
- Welfare to Work Networking Conference 1998, 1999
- Adult Basic Education Conference 1997, 1998
- National Council for Technical Education 1997

Professional Positions and Awards:

2009 Bellwether Award Winner for Workforce Education Innovation (State-wide Diagnostic Imaging Program)

2007 Bellwether Award Finalist for Workforce Education Innovation (Oregon Pathways Work)

Commissioner, Corvallis Economic Development Commission (2010 to present)

Chair, Community College Healthcare Education Alliance (2009 to present)

Vice Chair, Health Authority Board, Workforce Committee (2009 to present)

Bellwether Consortium Member (2009 to present)

Board Member, Workforce Investment Board (2003 to present)

Board Member, Oregon Simulation Alliance (2008 to 2010)

Chair, Community College Workforce Strategies (2006-2008)

Chair, Oregon Pathways Alliance (2005-2007)

References:

Supervisor

Carol Schaafsma,
Executive Vice President
Academic Affairs & Workforce Development
Calapooia Center 102-B
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Direct Reports

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Professional Colleagues

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Healthcare Education Alliance
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26000 SE Stark St.
Gresham, OR 97030
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Business and Community Leaders

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Salem, OR 97310
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Director of Oregon HealthCare Workforce Institute
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Lake Oswego, OR 97035
503-479-6002
joi@oregonhwi.org

Dr. Larry Mullins
CEO, Samaritan Health Services
Good Samaritan Regional Medical Center
3600 NW Samaritan Dr.
Corvallis, OR 97330
larrym@samhealth.org

Steve Bekofsky
WIB Director
545 SW 2nd, Suite A
Corvallis, OR 97333
541-758-2605
sbekofsky@communityservices.us

Dr. Rita Cavin
President Emerita, LBCC
240 SW 7th St
Corvallis, OR 97333
541-757-1057
rita.cavin@linnbenton.edu

P. SHELDON FLOM, CPA
1790 Cedar Crest Court, Reno, NV 89521
307.254.2030 (C)
psflom11@gmail.com

CAREER OBJECTIVES

I am seeking a senior leadership role that can benefit from my 13 years of experience in higher education finance and administration with areas of strength in budgeting, strategic planning, human resources, information technology services, bookstore management, and capital project funding.

PROFESSIONAL EXPERIENCE

Desert Research Institute (DRI), Reno, Nevada

September 2018 to Present

Vice President for Finance and Business

As the Vice President for Finance and Business Administration (VPFB), I provide oversight of all services of the Financial Services Office (FSO) including controller, managing a \$48 million budget, post-award grants and contracts, procurement, and travel, manage compliance with Nevada System of Higher Education (NSHE) as well as the Board of Regents' policies and procedures. I am a member of the President's Senior Leadership Council (SLC). I represent DRI on the NSHE Business Officer Council and Campus Executive Committee which oversee the governance of the statewide enterprise information system. I attend all regular meetings of the NSHE Regents, attend and testify at Legislative Budget Hearings.

- Provide financial leadership and recommendations for all financial matters focusing on short-term tactical and long term strategic financial goals to ensure DRI's financial stability.
- Facilitate and improve the transparent communication of the institutions' financial matters with FSO, the President, and senior leadership.
- Manage and oversee indirect cost rate determination and negotiations with DRI's cognizant agency, fringe benefit rate determination, and cost accounting standards required for government contracts and awards.
- I collaborate with the President, senior leadership, and Faculty Senate to develop the budget for the current biennium's budget for inclusion in the NSHE budget, which will be presented to the Governor in the spring of 2020.
- Leading the process to revise DRI's state funding formula. Facilitating the internal and external communications with members of DRI's Faculty Senate and NSHE's CFO.
- Oversee the financial processes and provide financial advice to the Boards of the DRI Foundation, DRI Research Parks Ltd., and coordinate the financial reporting of the Desert Research Corporation to the DRI Research Foundation Board.

Western Wyoming Community College, Rock Springs, Wyoming

January 2015 to August 2018

Vice President of Administrative Services

The Vice President of Administrative Services (VPAS) is the Chief Business and Financial Officer of the College and is responsible for all administrative services functions at the College including overseeing a \$48 million budget, financial management, grant administration, information technology, human resources, physical resources, campus dining, bookstore, and other auxiliary functions at the College. VPAS is a standing member of the President's Cabinet; Western Leadership Council (WLC) and regularly advises the College President and members of the Council regarding financial, administrative and regulatory matters. I attended all regular meetings of the Board of Trustees and special meetings as needed.

- WLC participated in strategic planning and assessment, the Higher Learning Commission (HLC) accreditation and program assessment, and strategic budget planning.
- I served as the Acting President in the President's absence. I represented WWCC in meetings with Governor Mead, the State Building Commission (SBC), Joint Appropriation Committee, and Wyoming Community College Commission (WCCC).
- I guided the budgeting process for the College, including during FY 2017 and FY 2018, when we had budget cuts of approximately 18% and 14% respectively. I conducted workshops and gathered their input and priorities from the Board, Para-Professional Alliance, and the College Senate and all-campus forums sponsored by the Senate.

- In FY 2017, I was the sponsor of a twelve-month project for the re-installation and upgrade of the human resource and payroll software and the updating of their procedures, completed on time and under budget.
- Chaired the steering committee that updated the facility master plan approved by the Board in spring 2017 including a study of our residence halls to develop recommendations for improvements and replacements of our existing facilities
- Co-chaired the committee that revised the emergency operation manual. We worked with local, state, and federal agencies to ensure the plan mitigate risks to protect students and employees.
- Oversaw a major project to renovate our HVAC and electrical supply systems. Worked with the State of Wyoming Construction Management Division and received an appropriation to study the HVAC system to determine the problem. I presented to the SBC, WCCC Commissioners, and individual legislators during the legislative session.

NORTHWEST COLLEGE (NWC), Powell, Wyoming

May 2006 to December 2014

Interim Vice President of Administrative Services, October 2013 to December 2014

Assumed all responsibilities and duties as the administrative officer of the College and provided the strategic direction, leadership, and operational management of the Administrative Services Department including budget development, physical plant, information technology, human resources, business office, bookstore, auxiliary operations, and insurance and risk management programs.

- Participated as a member of the President's Advisory Council (PAC) advising the President on a wide range of topics including college policies, personnel issues, employee compensation and banding, budgeting priorities, and campus-wide communications and coordination of events and issues.
- Attend PAC retreats to analyze our progress towards the attainment of strategic initiatives associated with the current strategic plan and start the visioning process for the next strategic plan. Determine objectives and assessment of the current year's operational plan and goals.
- I worked directly with the State of Wyoming Construction Management Division on the contract administration for the construction of the \$14.5 million Yellowstone Academic Building Project representing NWC's interests and priorities during construction.
- Led the steering committee responsible for the updating of the facility master plan and I was responsible for guiding the process of implementing the plan's recommendations
- NWC's representative on the Administrative Services Council of the Wyoming Community College Commission (WCCC). Collaborating on issues such as the updating of the funding allocation formula to include performance objectives as part of allocation criteria, Complete College Wyoming, and legislative mandates.
- Served as a member of the accreditation steering committee and responsible for gathering information for evaluation criteria.
- Participated in emergency operations planning and training as part of the Crisis Management Team.

Finance Director May, 2006 to September 2013

Acted as the Chief Financial Officer for the College, overseeing all institutional finances and fiscal operations, including supervision of the \$34 million annual budget.

- Served as acting Vice President of Administrative Services in the Vice President's absences.
- Member of the design steering committee, the finance team responsible for raising funding, and the contract administration team for the construction of the Yellowstone Academic Building.
- Negotiated the contract and leasing of the NWC bookstore to Follett Higher Education Group and oversaw the transition of the bookstore to Follett and served as the primary contact and liaison with Follett Higher Education Group.
- Co-led the team responsible for the issuing of lease revenue bonds to finance the Simpson Hall expansion project.
- Provided financial information and recommendations for strategic planning, special request from the President, Trustees, the President's Advisory Council, and for departmental planning.
- Maintained the accounting integrity of the College by monitoring internal controls, transactions, and policies. Managed the annual financial audit resulting in zero significant findings.
- Supervise the operations of the Business Office; monitor its customer service, intrepid application of policy in purchasing, accounts payable and receivables, and was responsible for oversight of grant accounting and reporting.

**ALASKA PERSONNEL, INC. (API) Ketchikan, AK,
Controller/CFO, January 2002 to April 2006**

July 1998 to April 2006

API is a management company that provides services to three commonly owned corporations. Alaska Ship and Drydock, Tyler Rental, Ty-Matt. Acted as the Chief Financial Officer overseeing all finances, fiscal operations, and supervision of the company and construction project budgets.

- I designed a cost accounting system that met governmental cost accounting standards and was approved by the Department of Defense Auditing Agency and qualified Alaska Ship and Drydock for a \$70 million Office of Naval Research contract.
- I was the financial administrator for a \$70 million Office of Naval Research design-build project.
- Responsible for cash management, cash flow forecasting, and cash handling procedures for all of the companies. Managed lines of credit, equipment loans, and project bonding agreements.
- I was a member of the management team that successfully negotiated with the Alaska Industrial Development and Export Authority for a long-term lease of the dry-dock and upland facilities.
- I led the negotiating team for the annual renewal of health insurance, employee benefit programs, property and liability insurance, and worker's compensation insurance.

Corporate Accountant, July 1998 to January 2002

Duties included general accounting, cash management, and monthly closings for the three commonly owned corporations.

- Reconciled the job cost accounting system to the financial accounting system monthly.
- Developed and ran job costing reports for monthly manager meetings.
- Tested and coordinated the correction of problems after the installation of a point of sales and a capital inventory management system. Led the integration of the new software program with our ERP system.

ERICK W. JONES, CPA, PC.

November 1996 to July 1998

Staff Accountant,

Erick Jones was a public accounting firm that performed income tax, booking keeping, and auditing services in Powell, Wyoming and the surrounding area. Clients included Northwest College.

Returned to college for a Bachelor's of Science degree in accounting.

FLOMS' FORD AND CHRYSLER

December 1983 to February 1994

General Manager and Minority Owner,

Flom's Ford and Chrysler was a family-owned business with 20 employees and annual sales of over \$5 million, which operated in Powell, Wyoming from 1979 to 1994.

EDUCATION

UNIVERSITY OF WYOMING, Laramie, Wyoming

- Master of Business Administration
- Bachelor of Science, Accounting
- Bachelor of Science, Business Administration

NORTHWEST COLLEGE, Powell, Wyoming

- Associate of Arts, Speech Communications

CERTIFICATIONS

- Certified Public Accountant in good standing in the State of Wyoming, 2006 to present
- Licensed by the State of Wyoming to sell insurance and annuities, 1985 to 1997
- Federally licensed and bonded to sell securities in the State of Wyoming, 1994 to 1996

OTHER ACHIEVEMENTS

- Completed the National Association of College and University Business Officer (NACUBO) New Officer Program in 2017
- Presented *What a Credit Hour Really Cost* at the September 2016 NACUBO Planning and Budgeting Forum. Invited by NACUBO to present at the November Managerial Analysis and Decision Support Forum.

- I developed a costing model to determine the cost of class delivery: traditional, online, and concurrent, adopted by the WCCC as part of their analysis to set tuition.
- A graduate of the 2008 Park County Leadership Institute
- Passed the CPA exam in the first sitting, placing in the approximately top 15 percent of all candidates taking the November 1997 exam.
- 1992 Kiwanis Club Officer Merit Award, presented by Kiwanis International

Jason J. Dorsette
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Social change agent skilled in diversity, equity, and Inclusion initiatives, strategic visioning and planning, intergroup facilitation and dialogue, research, policy analyst, higher education, public speaking, community organizing, and organizational management.

EDUCATION

Ph.D. student (ABD)
Oregon State University
Educational Policy and Equity

Master of Public Policy and Administration
North Carolina Central University, Durham, NC
Educational Policy/Organizational Leadership

Bachelor of Arts
North Carolina Central University, Durham, NC
History and Middle Grade Education

HIGHER EDUCATION ADMINISTRATOR EXPERIENCES

Associate Director

Educational Opportunities Program
August 2019-present
Oregon State University
Corvallis, OR

Provides support for the signature initiatives and efforts of the Educational Opportunities Program within the Division of Students Affairs. In this role I specifically focus on internal and external program design and implementation, communications and marketing, faculty and staff engagement, and assessment

- Develop and conduct assessment plans to include surveys and student-based data.
- Manage the Educational Opportunities Program overall communication and outreach plan
- Facilitate comprehensive trainings for faculty and staff around supporting underrepresented (students of color, LGBTQ+ spectrum, undocumented, low socio-economic status, first gen, and transfer, and others with marginalized identities) students
- Serve as an academic coach/ counselor
- Teach transfer student transition and undergraduate special topics (DEI) courses
- Develop and enhance relationships with various colleges and academic and student services programs such as Student Experiences and Engagement, Recruitment & Diversity Initiatives in the College of Engineering, and Diversity, Equity & Inclusion in the College of Forestry, the Office of Institutional Diversity, and OSU Faculty and Staff Senate
- Serve in various institutional leadership roles that strategic aims to areas to promote BIPOC student and faculty success and initiatives; transfer students outreach and engagement programs, student

experiential learning experiences, Division of Student Affairs Assessment, and grant writing efforts in support of marginalized students and faculty of color.

- Create teaching and programmatic curriculum with a focus on student success, leadership, and inclusion

Director

Advancing Academic Equity for Student Success (**Institutional restructuring occurred and position was phased into Educational Opportunities Program*)

September 2018- August 2019

Oregon State University

Coordinate and support the University equity and inclusion efforts, services, and programs, specifically as it relates to overall student and faculty program development, implementation, assessment, and outreach. Serve as subject matter expertise in equity and inclusion focus areas such as diversity, affirmative action, equal employment opportunity, disability services, and community building.

- Coordinate, support, and evaluate institutional equity and inclusion programs and initiatives
- Provide strategic diversity and inclusion policy review, development, training and integration across various divisions at the university
- Conduct research and monitor performance against program, academic department, and overall institutional goals and objectives as it relates to equity and inclusion efforts and services
- Establish, manage, and maintain collaborations and partnerships with various OSU departments, colleges, and co-curricular programs as well as resources external to the OSU community such as government agencies, community stakeholders, and professional organizations to help build and leverage expertise and resources
- Provide resources and expertise to internal and external stakeholders including but not limited to serving on campus committee, delivering activities, events, and trainings
- Lead the university Men's Development & Engagement Program and Distinguished Scholars Initiative (male of color success program)
- Supervise 1 professional staff, 2 graduate teaching assistances, and 7 student staff (5 transfer students and 2 traditional undergraduate students) and interns
- Provide novel and creative approaches and resolutions to broad complex equity related challenges and issues
- Create collaborative opportunities with faculty, staff, and department heads around ways to achieve DEI related deliverables

Interim Executive Director

Diversity & Cultural Engagement

July 2017- August 2018

Oregon State University

Corvallis, OR

Provided overall leadership and direction for Oregon State University student diversity programming and campus inclusion efforts.

- Supervised twelve professional full time professional faculty/staff
 - 7 cultural resource center directors
 - 3 associate/ assistant directors
 - 1 marketing coordinator
 - 1 administrative assistance
- Managed general and student fee budgets totaling ~\$3.2 million dollars

- Served as a member of the Vice Provost of Student Affairs Leadership Team
- Designed policies and implemented best practices as it pertains to business operations, facility management, emergency responses, and system management

Sr. Associate Director & Chief of Staff

July 2014- July 2017

Diversity & Cultural Engagement

Oregon State University

Corvallis, OR

Served as proxy to the Executive Director & Assistant Vice Provost by providing key leadership and range of specialized support regarding matters of institutional importance, to include planning and execution of all administrative, operational, budget and procedures/policies for the unit of Diversity & Cultural Engagement (DCE).

- Supervised eight professional faculty (cultural resource center directors) members and two graduate teaching assistances
 - Facilitate performance and evaluations reviews and professional development goals setting
 - Oversee AYA: Womxn of Color, SOL: LGBTQ+ Multicultural Support Network, Men's Development & Engagement, and seven Cultural Resource Centers:
 - Asian & Pacific Cultural Center
 - Centro Cultural César Chávez
 - Ettihad Cultural Center
 - Lonnie B. Harris Black Cultural Center
 - Native American Longhouse Eena Haws
 - Pride Center
 - Hattie Redmond Women & Gender Center
- Provided administrative and fiscal leadership and oversight of the unit ~\$3 million budget
- Provided leadership around overall programmatic and assessment design to ensure alignment with divisional and institutional goals and priorities
- Served in liaison role and leadership capacity between the unit, the Division of Student Affairs, The Division of Academic Affairs, the broader OSU campus community, and regional community agencies and partners
- Served in liaison capacity to the OSU Foundation & Development Office, and the OSU Alumni Association
- Managed internal and external communications

Inaugural Director

December 2011- December 2014

Centennial Scholars Program & Minority Initiatives

North Carolina Central University

Durham, NC

Responsible for all functions of the Centennial Scholars Program & Minority Initiatives including but not limited to budget, personnel, vision/mission setting, fundraising, and internal and external relations. Centennial Scholars Program & Minority Initiatives consisted of: African American Male Initiative (AAMI), Collegiate 100 Black Men, LatinX Student Success Group (LSSG), Eagle Sisters, and LGBTQ Resource Center (shared responsibility with the NCCU Women Center), Student African American Brotherhood (SAAB).

- Supervised six full-time professional staff members

- Served as NCCU Principal Investigator for the UNC-General Administration Minority Male Mentoring Program, Lumina Foundation Achievement Grant, and the US Dept. of Education – SAFRA-Title III grant totaling \$600,000
- Produced annual reports to granting agencies, and academic and supportive units
- Chaired, Centennial Scholars Program Advisory and Stakeholders Board (Comprised of University senior level administrators, faculty, staff, city and county leaders, program supporters/sponsors, parents/caregivers)
- Maintained appropriate statistical reports, surveys and other records to assess student learning outcomes, program needs, and opportunities for growth
- Established public relations strategies to foster attendance of Centennial Scholars Program & Minority Initiatives activities and programs
- Established and evaluate policies and procedural guidelines
- Developed trainings an onboarding activities and programs for new professional staff

Chief of Staff to the Vice Chancellor for Student Affairs & Enrollment Management (*Special appointment*)

December 2011- May 2012

North Carolina Central University
Durham, NC

Assisted the Vice Chancellor for Student Affairs & Enrollment Management with special assignments and prepared financial and narrative reports on the status of various diversity initiatives, programs and activities sponsored by the division of Student Affairs and provided strategic planning consultation to the Vice Chancellor for Student Affairs & Enrollment Management.

- Provided high level administrative support to the Vice Chancellor for Student Affairs & Enrollment Management, encompassing a wide range of confidential and sensitive matters
- Assisted the Vice Chancellor with unique student concerns and issues
- Provided leadership on the NCCU Student Affairs & Enrollment Management annual report
- Managed and secured multiple Student Affairs & Enrollment Management grants and funds
- Represented Student Affairs & Enrollment Management on the Triangle for Latino Student Success Leadership Council
- Collaborated with departments and academic and business units on tasks such as assessment, cross-instruction benchmarking, student engagement, underserved student populations success, capital campaign, and project coordination
- Chaired the monthly Student Affairs & Enrollment Cabinet Leadership meeting
- Represented the Vice Chancellor for Student Affairs & Enrollment Management during monthly Council of Deans meetings, Board of Trustee meetings, Faculty and Staff Senate meetings, and UNC General Administration meetings/forums as needed.
- Facilitated student and faculty meetings regarding student academic performance and conduct matters
- Chaired the Homecoming Planning Committee
- Assisted with planning middle and high School campus visit days, new student orientation, welcome week activities, and open house for new students first year and transfer students
- Served as student advocate/stand-in Ombudsman

Assistant Director

June 2009- November 2011

Alfonso Elder Student Union

North Carolina Central University

Durham, NC

Provided continuity to the Student Government Association (SGA) and Registered Student Organizations (RSOs) by making sure that successive officers of the organizations understand the responsibility they share as leaders, as well as explaining to the officers the rules and policies established for student organizations; responsible for advising SGA and RSOs .

- Coordinated all contractual negotiations, facility use schedules and promotion of all programs
- Demonstrated knowledge of university, departmental, and State policies and regulations regarding purchasing, contract negotiations, building operations, safety, and public events
- Established partnerships with internal and external providers that strengthen relationships and promoted the core values, mission, and goals of the Alfonso Elder Student Union
- Assessed programs for effectiveness and future development, including tracking students
- Managed SGA operational budget
- Designed SGA strategic plan
- Created and planned SGA and RSO academic calendar of events
- Managed compensation packages for all paid student leaders
- Coordinated leadership trainings and development sessions for SGA and RSO students
- Advised the NCCU University Royal Court Coronation, pageants, and external community outreach activities and opportunities
- Facilitated diversity and social justice programming

Student Development Specialist

June 2007- May 2009

School of Graduate Studies

North Carolina Central University

Durham, NC

Provided multiple support services for current and prospective graduate students through a various student enrichment and diversity education efforts; served as a resource in advocacy, mentoring, academic support, and enhancement life skills.

- Coordinated and scheduled the School of Graduate Studies New Student Orientation activities and programs
- Researched professional development opportunities for professional staff and graduate and international student researchers
- Designed and streamlined graduate admission processes on behalf of the Dean of Graduate Studies
Rejuvenated the student-led multicultural leadership cabinet
- Served as webmaster for the School of Graduate Studies
- Designed a process for graduate and professional student travel
- Served on University Southern Association of Colleges and Schools (SACS) accreditation committee on behalf of the NCCU School of Graduate Studies
- Coordinated the annual graduate student and teaching faculty research symposium

RELEVANT INSTITUTIONAL COMMITTEE EXPERIENCES

- Association of Faculty and Staff for the Advancement of People of Color (Oregon State University)
- President and Provost's Leadership Council on Equity, Inclusion, and Social Justice (Oregon State University)
- President's Commission on the Status of Black Faculty and Staff Affairs (Oregon State University)
- University Relations and Marketing Advisory Board (Oregon State University)
- Human Resources Search Advocate Program (Oregon State University)

HIGHER EDUCATION TEACHING EXPERIENCES

Oregon State University UEXP 320: Special Topics: Black Experience post 1865 (2019-present)

- Oregon State University UEXP 300: Transfer Student Transition (2018- present)
- Adjunct faculty, Oregon State University Adjunct faculty, College of Liberal Arts (2016-2019)
- Adjunct Faculty, Oregon State University, College Student Services Administration Program, Graduate Program (2014- present)

SOCIAL, CIVIC, AND COMMUNITY INVOLVEMENT

- President, NAACP Corvallis- Albany (Linn and Benton Counties) Branch, OR
- Advisory Board Member, Community Services Consortium—Albany, OR
- Newly elected, Willamette Criminal Justice Council (WCJ)—Benton counties, OR
- Lead Consultant, Willamette Valley Regional Racial Equity Group (Monthly DEI trainings/workshops with Superintendents and equity leaders across the following school districts: Corvallis School District, Greater Albany Schools, Lebanon School District, Philomath Schools District, and Lincoln School District)
- Advisory Board Member, City of the Mayor of Corvallis, Imagine Corvallis Action Network
- Alpha Phi Alpha Fraternity, Incorporated

PROFESSIONAL MEMBERSHIPS

American College Personnel Association (ACPA)

Commission for Social Justice Education

Commission for Two Year Colleges

National Conference on Race and Ethnicity in American Higher Education (NCORE)

National Association of Diversity Officers in Higher Education (NADOHE)

National Association of Student Personnel Administrators (NASPA)

Gender and Sexuality Knowledge Community

Men and Masculinities Knowledge Community

Off-Campus and Commuter Student Services Knowledge Community

Socioeconomic and Class Issues in Higher Education Knowledge Community

American Society for Public Administrators (ASPA)

Phi Beta Kappa Academic Honor Society

PROFESSIONAL PRESENTATIONS & PUBLICATIONS

Keynote Speaker, Region 8 & 9 National Academic Advising Association (NACADA) Conference 2021

Keynote Speaker, PNW Louis Stokes Alliance for Minority Participation (LSAMP) Conference 2021

Workshop Facilitator, Clackamas County Public Health Division Meeting 2021

Presenter, Western Oregon University Medical School DEI Workshop 2021

Keynotes Speaker, Linn Benton Community College Dr. MLK, Jr. Week, 2020
Presenter, Oregon State University Student Success Conference 2020
Keynote Speaker, University of Oregon Student Leadership Summit, 2019
Keynote Speaker, Highline Community College Unity Through Diversity Week 2019
Keynote Speaker, Oregon State University Outstanding Black Graduation, 2018
Keynote Speaker, 7th annual Men and Healthy Masculinity Conference, 2018
TedTalk Speaker, ACPA & NASPA Conference on College Men, 2018
Keynote Speaker, OSU Juneteenth Celebration, 2016
Annual Presenter, African American Youth Leadership Conference 2016- present
Keynote Speaker, Pacific Northwest Association for College Admission Counselor (PNACAC) 2014

REFERENCES

Allison Davis-WhiteEyes, PhD (former supervisor)
Director of Community Diversity Relations
Office of the President and Institutional Diversity
Oregon State University
allison.davis-whiteeyes@oregonstate.edu
(541) 740-8399

John Haroldson, JD (Community partner)
District Attorney
Benton County District Attorney Office
John.M.Haroldson@co.benton.or.us
(541) 760-9872

Jesse Nelson, PhD (former supervisor)
Interim Assistant Vice Provost for Academic Advising
University of Oregon
Jesseyeagernelson@gmail.com
(509) 607- 4929

EXPERIENCE

Willamette Valley Cancer Foundation McMinnville, Oregon 2014

Executive Director

- Provide leadership, guidance and support for the Foundation Board of Directors in fund development plans and strategies to support the philanthropic needs of the Cancer Foundation.
- Create and foster new community relationships and nurture current community relationships.
- Provide overall leadership for planning and implementing all fund development activities and events including capital campaigns, major gift programs, grant proposals, planned giving programs, direct mail solicitations, endowment funds and special events.
- Responsible for the Foundation's strategic planning, including short and long range plans that are congruent with the Foundation's mission and goals.
- Work with the Foundation finance committee to assure proper management of Foundation funds.
- Develop and facilitate all patient support, education and awareness programs.

Family Building Blocks Salem, Oregon 2009 - 2013

Development Director

- Develop and implement FBB's annual donor-centered Development Plan with a goal of \$1.6 million.
- Supervise and manage Development Department staff.
- Identify, solicit and steward donors at all levels.
- Serve as a spokesman and advocate for FBB's mission and programs in the community.
- Engage Board members in developing and nurturing close working relationships with the philanthropic community.
- Facilitate all projects and activities of FBB's Young Leader's Council and Auxiliary.
- Support FBB's grant writer in identifying, writing, tracking, expending and reporting of grants.
- Collaborate with FBB's Leadership Team in the mission-focused guidance of the organization.
- Oversee the planning and implementation of all fundraising and donor recognition events.
- Design and implement all direct mail appeals.
- Collaborate on the development and implementation of FBB's annual Marketing Plan.
- Collaborate with the Director of Planned Giving and the Executive Director on developing and implementing FBB's planned giving program.

Western Oregon University Monmouth, Oregon 2008 - 2009

Director of Systems Management and Prospect Research

- Designed and implemented all aspects of the new prospect research system.
- Identified, created and implemented successful strategies necessary to increase the integrity of the 75,000+ donor database.
- Designed and implemented new processes to increase the functionality and efficiency of the advancement services department.

Western Oregon University Monmouth, Oregon 2005 - 2008

Development Officer

- Identified and solicited prospects at the President's Club level (\$1,000+) and higher.
- Redesigned and implemented WOU's first comprehensive athletic sponsorship program.
- Supervised all aspects of the Wolfpack Auction and Athletic Hall of Fame, including the development of event sponsorship.
- Designed and implemented all aspects of WOU's Annual Giving program, including mail, phone and personal solicitations.
- Supervised and directed student phone program, including supervision of 30 student callers and two student supervisors.
- Designed and implemented all athletic fundraising strategies related to budgeting, solicitation and event planning.
- Maintained and developed strong relationships with numerous businesses and individuals relevant to the WOU Foundation.
- Acted as staff liaison for the WOU Parents Club.
- Created various brochures, letters and solicitation materials.

- Assisted with the design and execution of membership campaigns including the Alumni Association and other WOU Foundation groups.
- Coordinated the volunteer boards for the Parents Club, Wolfpack Association, Football Association and Annual Fund.

Western Oregon University Monmouth, Oregon 2002 - 2005

Coordinator of Annual Giving Programs

- Designed and implemented all aspects of WOU's Annual Giving Program, including mail, phone and personal solicitations.
- Personal solicitation at the President's Club level (\$1,000+)
- Supervised and directed student phone program, including supervision of 30 student callers and one student supervisor.
- Assisted with the design and execution of all membership campaigns, including the Alumni Association, Wolfpack Athletic Club and various other WOU Foundation groups.
- Acted as staff liaison for the WOU Parents Club.
- Coordinated events, including the annual Wolfpack Auction and golf tournaments. Assisted in planning campus-wide events such as the WOU Athletic Hall of Fame and Family Weekend.
- Acted as database manager for the University Advancement database with responsibility for the maintenance and integrity of 40,000+ records.
- Created, designed and maintained the web pages for the University Advancement office.
- Worked with the Wolfpack Athletic Club in budgeting, solicitations and event planning.
- Created various brochures, letters and solicitation materials.
- Coordinated all aspects of the WOU athletic promotions program including solicitation of businesses.
- Created written pieces for WOU's alumni publication, the WOU Magazine.

Western Oregon University Monmouth, Oregon 2000 - 2002

Phonathon Coordinator

- Supervised 30 student callers on a nightly basis.
- Created, implemented and evaluated various phone campaigns for the University Advancement office.
- Developed new strategies and techniques for campaigns including the Annual Fund, Alumni Association, Wolfpack Athletic Club, Parents Club and Jensen Arctic Museum.
- Increased level of data collection and data integrity.

EDUCATION

B.S., Liberal Studies, 2005

Eastern Oregon University, La Grande, Oregon

Liberal Studies degree consisted of a focus in business and interdisciplinary writing and rhetoric.

CAMPUS INVOLVEMENT

- **Committee Member.** Family Weekend Committee, 2002 – 2006
- **Committee Member.** Business Incubation Steering Committee, 2004 – 2005
- **Senator (elected position).** Staff Senate, 2004 - 2005
- **Panel Member (appointed by president).** Sexual Harassment Task Force, 2005
- **Committee Member.** Customer Service Task Force, 2005
- **Panel member.** Blue Ribbon Athletic Panel, 2007
- **Committee Member.** Campus Recreation Feasibility Committee, 2007 - 2008
- **Council Member (elected position).** Administrative Support Council, 2008 - 2009

COMMUNITY AFFILIATIONS

- **Chair.** City of Independence Budget Committee, 2007
- **Chair.** Western Days 4th of July Committee, 2011 – 2012
- **Planning Commissioner.** City of Independence Planning Commission, 2008 – Present
- **Rotarian.** McMinnville Noon Rotary, 2014 – Present

PROFESSIONAL AFFILIATIONS

- **Board Member.** Mid-Valley Development Professionals, 2011-2013

Scott E. Rolen

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Corvallis, OR 97330

(541) 908-6194

EDUCATION

MASTER OF PUBLIC ADMINISTRATION

The University of San Francisco (1993)

BACHELOR OF SCIENCE

California State University, Sacramento (1989)

EXPERIENCE

HUMAN RESOURCES GENERALIST

City of Albany, Oregon

Albany, Oregon

(2007 to Present)

- ◆ Represents management in the collective bargaining process, working with key personnel to establish and interpret four (4) separate collective bargaining agreements. Responds to questions from managers and employees regarding contract provisions. Responds to assigned grievances, assisting management in preparing responses. Works with Human Resources Director and City Attorney to provide responses and prepare for grievance arbitration where necessary.
- ◆ Coordinates the development, implementation, revision, and maintenance of City Human Resources policies. Research, develop and revise HR policies and procedures.
- ◆ Oversees assigned performance management activities. Counsels management and employees regarding performance management issues. Assists management in developing performance management strategies for specific situations (e.g., performance review, performance improvement planning, progressive discipline, etc.).
- ◆ Participates in employee relations issues, counseling management accordingly. Conducts pre-disciplinary investigations and counsels management and employees according to findings.
- ◆ Oversees several Citywide Human Resources functions including safety programs and committees, professional training and development, ADA compliance, AA/EEO compliance, FMLA and leave administration, random, for cause, and post-accident drug screening, unemployment insurance administration, employee satisfaction and length of service awards.
- ◆ Supports the employee recruitment function, administering recruitments and counseling managers regarding the interview and selection process.
- ◆ Conducts new hire orientation programs and other various professional training modules as needed. Topics taught include ADA / FMLA compliance, post-accident investigation and follow-up, effective performance reviews, effective progressive discipline strategies, and leadership essentials.

DIRECTOR OF HUMAN RESOURCES

Boys & Girls Clubs of Greater Sacramento

Sacramento, California

(2003 to Present)

- ◆ Established the HRM function. Performed the full scope of HR Management functions supporting two (2) large-scale Club locations and one administrative office throughout the Sacramento region.
- ◆ Assisted managers with the recruitment and selection process in accordance with established policies and procedures.
- ◆ Developed, coordinated and conducted new hire orientation programs for all staff.
- ◆ Responsible for coordination and provision of training to staff including diversity, harassment / appropriate workplace behavior, performance management, conflict resolution and safety.
- ◆ Interacted with and counseled managers and line staff regarding employee relations issues and performance management issues.

- ◆ Coordinated and responded to employees' mandated leave requests, ensuring all notifications are sent and follow-up is complete and timely.
- ◆ Priced and selected benefit mix for organization, ensured employees' benefit enrollments were timely and accurate and responded to employees' questions regarding their benefit plans.
- ◆ Processed all hires, status changes, and terminations in a timely manner and coordinated the distribution of all necessary information to employees.
- ◆ Responsible for the development and updating of all job descriptions as needed.
- ◆ Developed and maintains organization's Employee Handbook for organizational policy and procedure. Presented and explained all proposed changes to the Board of Directors.
- ◆ Explained organizational policies and procedures to employees and responded to their inquiries regarding same.
- ◆ Coordinated and facilitated compliance with all federal and state laws and regulations.
- ◆ Responsible for oversight of employees' personnel files. Implemented systems to ensure that all such files are current and complete.

AREA HUMAN RESOURCES MANAGER

Planned Parenthood Mar Monte

Sacramento, California

(1997 to 2003)

- ◆ Performed Human Resources Generalist functions in the Sacramento, Stockton and Northern Nevada territories, serving more than 300 staff persons.
- ◆ Continually identified needs and developed dynamic training and development tools region wide.
- ◆ Implemented successful recruitment / retention strategies to address ongoing staffing needs.
- ◆ Responsible for employee orientation, training, employee relations, benefits administration, compensation, etc.
- ◆ Managed comprehensive performance management strategies including performance review, incentive compensation, employee recognition, professional development plans, progressive discipline and terminations.
- ◆ Represented management during the initial round of negotiations to establish a working collective bargaining agreement.
- ◆ As the area's employee relations designee, acted as liaison between organization and the collective bargaining unit to clarify interpretations of the union contract and mediate the grievance procedure.

EMPLOYEE RELATIONS SPECIALIST

The Money Store

Sacramento, California

(1996-1997)

- ◆ Provided for nationwide training and development of managers and employees with respect to the organization's policies and procedures as well as pertinent state and federal labor law. Focused on key training issues of harassment, appropriate workplace behavior, and conflict management.
- ◆ Provided ongoing training and hands-on assistance for managers regarding the appropriate use of the progressive discipline process.
- ◆ Acted as liaison between employees and management in the event of grievance or conflict.
- ◆ Acted as liaison between organization and workers compensation carrier for the maintenance of Workers' Compensation cases nationwide.
- ◆ Worked closely with employment and payroll functions to advise and insure sound practices in compliance with State and Federal law.

DIRECTOR OF HUMAN RESOURCES MANAGEMENT

AllCare Home Health Services/Home Care Management Services

Rancho Cordova, California

(1995 -1996)

- ◆ Responsible for establishment of the HR function in newer organization. Implemented organization wide human resources policies and practices performed the full scope of the HRM function.
- ◆ Responsible for the development of recruitment, employment, and orientation strategies to attract and maintain quality staff.

- ♦ Monitored the ongoing legal exposure of the organization and its employees and recommended risk management strategies accordingly.
- ♦ Served as organizational liaison responsible for the development, maintenance and sharing of all information required by OSHA, EDD, workers' compensation, professional and commercial liability insurance carriers, etc.

SPECIALIZED TRAINING/EXPERIENCE

- ♦ Trained in organizational behavior and human performance improvement (HPI) through the American Society for Training and Development.
- ♦ Currently pursuing a professional certification in the area of labor relations through the National Public Employer Labor Relations Association (NPELRA).
- ♦ Trained in the full scope of federal and state statutory compliance for employers.
- ♦ Trained to conduct needs assessments and provide targeted training to address organizational compliance and diligence in the areas of harassment, appropriate workplace behavior, diversity practice and employee safety.
- ♦ Experienced in the administration of systems to check the background history of applicants and employees and assess said histories against the needs of the organization and its clients.

Linn-Benton COMMUNITY COLLEGE



A Guide to Planning, Decision Making and Assuring Institutional Effectiveness

Last Revised 8/2022

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SECTION 1: INTRODUCTION

In approaching mission fulfillment, Linn-Benton Community College has focused decision-making into two spheres - an innovative sphere and an operations sphere with the goals to encourage innovation, reduce unneeded committees, and ensure ideas are tested and

evaluated while maintaining a traditional operational sphere that focuses on processes and successful implementation of approved innovations.

MISSION STATEMENT

To engage in an education that enables all of us to participate in, contribute to, and benefit from the cultural richness and economic vitality of our communities.

Our Core Themes highlight the main components of the mission statement. We define mission fulfillment in the Core Themes. Measuring the objectives of these themes is how we determine our institution's effectiveness. A "[report card](#)," summarizing the degree to which we have met each objective, is prepared every summer by the Office of Data and Decision Support and is available on the [MERIT web page](#).

CORE THEMES

Educational Attainment
Cultural Richness
Economic Vitality

The foundation for the Core Themes is based on one principle metric of effectiveness: student completion. Student completion is defined as a student's documented achievement of a readily identifiable and cohesive program of study that results in a demonstrable capacity to better one's life and to contribute back to our community. Essentially, fulfilling our mission means greater learning for a larger number of our citizens.

VALUES

At Linn-Benton Community College, our values serve as the foundation which inspires our actions and unites us as a community. As responsible stewards, we are committed to:

- Opportunity: We support the fulfillment of potential in ourselves and each other.
- Excellence: We aspire to the highest ideals with honesty and integrity.
- Inclusiveness: We honor and embrace the uniqueness of every individual and promote the free and civil expression of ideas.
- Learning: We commit to the lifelong pursuit of knowledge, skills, and abilities to improve our lives and our communities.
- Engagement: We openly and actively connect as students, faculty, staff, and community.

SECTION 2: PLANNING

LBCC'S PLANNING CYCLE

During the summer months, we engage in a succession of planning meetings and retreats, specifically designed to guide and support each year's continuous improvement efforts and produce the next iteration of strategies and priorities to achieve our Mission and Strategic

Goals. Under the innovative sphere arrangement, MERIT plays a central role in setting a focused direction for the college in terms of improvement, with support from its constituent innovation councils of Progression, Workforce, and Learning Innovation Councils.

MERIT has maintained mission fulfillment report cards for the past seven years; these remain the central touchstone in goals and targets for the campus to improve overall. The innovation councils under MERIT (and their various workgroups) work with MERIT and various other operational and leadership councils through the summer to help define the specific, measurable goals for the upcoming year. The President's Leadership and Board retreat review the recommendations from MERIT and its councils, and provide MERIT with guidance for the upcoming academic year.

BUDGET PLANNING

The college has an ongoing history of conservative budgeting for resources reflected in the budget development process. The LBCC Budget Team, consisting of the vice presidents, director of accounting and budget, and manager of accounting and budget, begin budget planning based on early input from the Board of Education for consideration by the LBCC Budget Committee, made up of the LBCC Board of Education plus seven public members. Beginning with long-range planning, both revenues and expenditures are projected for the upcoming five years by the budget team. This allows the budget committee to recognize long-term implications of budget decisions, both expenditures and tuition rates. The current-year budget is continually monitored and updated throughout the year, and the revised budget becomes the basis for the subsequent year as well as the long-range projections.

The college begins the budget process in October. The budget officer projects the revenues and rolled over expenditures, known as the Essential Budget Level (EBL), and provides the information to the budget team who reviews the information and determines the assumptions to be used in building the proposed budget. The budget team combines the feedback from the assessment and planning work with the revenue and expenditure projections to outline the critical choices the college could make. The choices are brought to the Board of Education and budget committee members with recommendations at a January board meeting.

Once the board confirms the direction of budget development and the assumptions incorporated by the budget team, the team determines if reductions or investments are appropriate based on the most current information and board direction. The college updates a set of written financial guidelines that assist in the development of the annual budget. The guidelines are based on the parameters confirmed by the board to manage financial issues, maintain long-term fiscal stability, and enable the college to implement strategic initiatives. The guidelines provide direction for budgeting operating funds, grants, auxiliary activity, and other funds. Budget managers then begin working within individual departments to prepare the budget. Departments and divisions begin the process of identifying program and department needs for the upcoming budget year. There is an iterative process tied to the budget calendar and its critical path for formal presentation of the proposed budget to the budget committee. Budget investments (or reductions) are tied to the impact on strategic

goals and core themes of the college. Budget requests are submitted to area managers, vice presidents, and ultimately the president.

Funding increases are allowed through two mechanisms:

Performance Packages: These are ongoing expenditures deemed critical to meeting the college mission that become part of the EBL once adopted. Faculty and classified positions, both restored from earlier reductions and newly added, are adopted through this method.

Capital Project Operating Costs: These are operational costs incurred new facilities, including instruction, instructional support, student services, and operational costs.

Summarized budget requests are presented to the budget team and evaluated as a whole, and the team makes a recommendation to the president on investments or reductions for the budget, keeping in mind that a balanced budget is required. The draft budget is shared with constituent groups on campus at a series of informal meetings attended by faculty, staff, and students. The president and the budget officer then present the proposed budget to the LBCC Budget Committee for deliberations.

The budget committee is comprised of the seven voter-elected LBCC Board of Education members and seven appointed members from the college district. The budget committee analyzes the budget as proposed by the administration, makes recommendations, receives public comment, and approves the proposed budget and the tax rate to be levied. The college publishes the budget and provides public notice of budget hearings via local newspapers. A complete copy of the proposed budget and any presentation material is made available on the college's public website.

Following approval of the proposed budget, the board of education holds a public hearing, receives public testimony, makes any adjustments within their authority, and adopts the budget prior to June 30 each year. The business office monitors any budget changes subsequent to the adoption of the budget and appropriate board action is taken according to ORS 294 and board policy.

The college has several written policies and procedures regarding the development of the annual budget. These policies explain the role of the board of education, their duties and responsibilities (BP 2015), the college budget committee (BP 2060) and the role and responsibilities of the President (BOP 3030-A).

STRATEGIC FUNDING PLANNING PROCESS

Each year, the College sets aside funding for projects that support progress on our 14 Objectives (outlined in our MERIT report cards). Projects are typically funded from this budget line for one to two years, with some exceptions made that extend funding through a third year.

Individuals / programs with project ideas submit these through the Innovation Councils under MERIT. Templates for the submission of proposals are found on the MERIT webpage,

encouraging recognition of evaluation, impact, and overall strategy. Decisions about which projects to fund are made year-round by the Innovation Councils, who send decisions to the Budget Team for final approval.

At the conclusion of the strategic initiative timeline, the innovation council discusses the evaluation plan and decides if they want to recommend this project for continued funding.

SECTION 3: DECISION MAKING

Major decisions at LBCC are made by the President, who makes strategic and operational decisions, and the Board of Education, who make policy and governance decisions. Both the President and the Board of Education consider recommendations made by the College's councils and committees when making decisions. The more thoroughly the recommendation is prepared, the more likely it is to be accepted. The President can assign decision making authority to a Vice President or council and, in some cases, to a committee.

The clear division between an innovation and operational sphere is meant to encourage a space that is more open to risk-taking and experimentation, allowing for robust testing at smaller scales and only moving successful innovations forward to become standard operations in the operational sphere.

The bridge between the two spheres are the Vice Presidents, who play critical roles throughout the system, but central to the idea is broad based groups working under the oversight of innovation councils to make progress on meeting our goals as documented in the MERIT Report Cards.

DECISION-MAKING PHILOSOPHY

The Linn-Benton Community College Decision-Making Philosophy is designed to guide wise decision-making at the College. It is based on five pillars – conditions that must be present for the College to be effective. These pillars are

Shared mission – Our shared ideals are expressed in our mission statement, strategic goals, core themes and values. Together, these provide a strong foundation for facing the future.

Shared engagement – We care about the direction and quality of the College. Each of us must be involved in making significant contributions to the over-all quality of the institution. Good ideas only grow when people throughout the College are engaged.

Shared respect – The basis for respect is the assumption everyone is trying to do his or her best work. If we begin with that assumption then disagreements are framed in the context of people having different perspectives, rather than someone being right or wrong. If we expect engagement at all levels, meetings must model respect for all participants. Respectful behavior creates a culture of trust, essential for the sharing of information and the avoidance of denial.

Shared information – The College uses evidence to support its decisions; evidence must be accurate, valued and standardized to ensure consistency and accuracy in the interpretation of data. Each council and committee is encouraged to work with the Office of Data and Decision Support to seek out relevant analytics. Our best thinking requires the sharing of critical information. Each member of the LBCC community should take personal responsibility for being informed and for informing others.

Shared risk – Moving forward entails risk. We study information available to us, we agree on assumptions about the future, and we move forward. In the ideal situation, we will have information we can trust, and will feel our opinions are respected. We encourage the expression of novel ideas and new approaches because we recognize they may better serve our students. We will implement new ideas when there is evidence supporting the case that our students will learn more and have a greater chance of achieving their educational goals.

It is fundamental to the health of the College that our decision-making councils and committees operate in a culture of common mission, engagement, mutual respect and information sharing. This culture will allow us to move into the future with confidence and to make wise decisions that will benefit our students and our community.

Councils are advisory to the President or other administrators and deal with a broad range of issues affecting the College and community. The goal of the LBCC council and standing committee structure is to produce a process in which timely decisions and the reasons for them are guided by involvement and action from, and are transparent to, the rest of the

community. Councils have broad institutional scope, are responsible for issues essential to institutional vitality, and advance the College strategic plan.

BOARD OF EDUCATION

Purpose

The [Board of Education](#) works on behalf of its constituencies and communities to ensure Linn-Benton Community College achieves the appropriate results, at an appropriate cost, to advance the College mission, core themes, and strategic goals.

Contact: Lisa Avery, President

Membership

The Linn-Benton Community College Board of Education consists of seven members, each of whom is elected by the electors within district zones. Members reside within the zones from which they are elected.

- Representative Zone 1
- Representatives Zone 2-3 (Two Members)
- Representative Zone 4
- Representative Zone 5
- Representatives Zone 6-7 (Two Members)

Meeting Schedule

Meetings are held once a month

EXECUTIVE TEAM

Purpose

Address acute issues and decisions.

Contact: Lisa Avery, President

Membership

- President
- Vice President, Academic and Student Affairs
- Vice President, Finance and Operations
- Director, Human Resources
- Executive Director, Institutional Advancement

Meeting Schedule

Meetings are held twice monthly

COLLEGE COUNCIL

Purpose

The purpose of [College Council](#) is to provide a clear and sustained focus on the on-going administrative activities of the College, providing the President with advice, consultation, and recommendations in the application and pursuit of institutional goals and purposes, especially in the review, revision and/or development of Board Policy and Administrative Rules.

The Council provides an avenue by which information and ideas regarding the administration of the College can be collected and disseminated, and a forum where these can be discussed. The Council reviews and provides feedback on the EBL budget document, performance packages, and strategic initiatives before presentation and review with the Board.

Contact: Lisa Avery, President

Membership

- President
- Executive Assistant to the President & Board of Education
- Vice President, Academic and Student Affairs
- Vice President, Finance and Operations
- Executive Director, Institutional Advancement
- Director, Equity, Diversity & Inclusion
- Director, Human Resources
- Dean of Academic Progression
- Faculty (4 – selected by Faculty Association)
- Classified Staff (4 – selected by Classified Staff)
- Students (4 – selected by ASLBCC plus an advisor)
- Management (2 – selected by MESA)
- Part-time Faculty (2-selected by PTFA)

Meeting Schedule

Meetings are typically held the first Thursday of each month

PART-TIME FACULTY ASSOCIATION

Purpose

The [Part-Time Faculty Association](#) (PTFA) was created to represent PT faculty.

Contacts: Hathai Sangsupan, President

Membership

The bargaining unit represents anyone whose pay is based on the part-time faculty salary and who is teaching one or more credits in a term (and is not part of any other bargaining unit).

CLASSIFIED ASSOCIATION

Purpose

- Represent the classified employees in their employment relations with the LBCC Board of Education.
- Enhance the personal growth and professional advancement of the members.
- Support the mission of the College and work with the other associations to achieve a quality educational and work environment.

Contact: Classified Association President, Kim Koplien

Membership

All Contracted Classified

Meeting Schedule

Third Thursday of each month from 2-3:00 p.m.

FACULTY ASSOCIATION

Purpose

The purpose of the [Faculty Association](#) is to defend and promote academic freedom, due process, and shared governance; to protect and advance the interests of faculty members and their students; and to collaborate with the college administration in the creation of college policy.

Contact: Deron Carter, President, and Claire Burke, President Elect

Membership

All members of the LBCC faculty bargaining unit are eligible

Meeting Schedule

Once a month, and as needed

STUDENT LEADERSHIP COUNCIL

Purpose

The [Student Leadership Council](#) ensures the greatest participation by students in the immediate governance of and policy development for the College at all levels, including the exercise of all rights of students.

Contact: Rob Camp, Coordinator. of Student Life/Leadership, and SLC President

Membership

- SLC President
- SLC Vice President
- SLC Finance Director
- SLC Community Outreach Director
- SLC Student Outreach Coordinator
- Director of Legislative Affairs
- Communications Director
- Executive Assistants (2 Representatives)
- Event Planners (4 Representatives)
- Benton Center Director
- Lebanon Center Director

ACADEMIC AFFAIRS COUNCIL

Purpose

To assist instructional leadership at LBCC, [Academic Affairs Council](#) (AAC) will:

- Lead the College in determining instructional priorities and practices.
- Help individuals or groups determine the appropriate venue for addressing issues that affect instruction, faculty, and students.
- Make recommendations to appropriate individual(s)/group(s) regarding major college-wide instructional issues, policies, procedures and practices.

Contact: Ann Buchele, Vice President of Academic and Student Affairs, and Raymund Ocampo, Chair (faculty)

AAC Membership

- All Department Chairs
- Representative of the Faculty Association
- Representative of the Faculty Senate
- Instructional Deans
- Benton County Regional Director
- Coordinator, Center for Accessibility Resources & Student Assessment

- Student Government Representative
- Vice President, Academic and Student Affairs (*nonvoting*)
- Dean of Instruction (*nonvoting*)

AAC Meeting Schedule

Meetings are twice per term, on Tuesday afternoons

ACADEMIC AFFAIRS EXECUTIVE COUNCIL COMMITTEE

Purpose

The purpose of AACEC is to set the agendas and work for AAC during the school year. AACEC is responsible for prioritizing the topics and issues, or directing them to the appropriate council or committee.

Contact: Ann Buchele, Vice President of Academic and Student Affairs, and Raymund Ocampo, Chair (faculty)

Membership

- Vice President, Academic and Student Affairs
- Dean of Instruction
- Two Instructional Deans/Associate Deans
- Five Faculty Department Chairs
- AAC Faculty Chair
- Faculty Association Representative
- Faculty Senate Representative

Meeting Schedule

Meetings are twice per term, two weeks before AAC

DEANS AND DIRECTORS

Purpose

Advise the Vice President of Academic and Student Affairs regarding the needs, priorities, and the effectiveness of college operations.

Contact: Ann Buchele, Vice President, Academic and Student Affairs

Membership

- Vice President, Academic and Student Affairs
- Dean of Academic Progression
- Dean of Academic Foundations
- Dean of Healthcare

- Dean of Arts, Social Sciences & Humanities
- Dean of Science, Engineering & Math
- Dean of Advanced Manufacturing and Transportation Technology
- Regional Director for Benton County

Meeting Schedule

Meetings are held almost every Tuesday morning

EXPANDED DEANS AND DIRECTORS

Purpose

Advise the Vice President of Academic and Student Affairs regarding the needs, priorities, and the effectiveness of college operations.

Contact: Ann Buchele, VP, Academic and Student Affairs

Membership

- Vice President, Academic and Student Affairs
- Dean of Academic Progression
- Dean of Academic Foundations
- Dean of Healthcare
- Dean of Arts, Social Sciences & Humanities
- Dean of Science, Engineering & Math
- Dean of Advanced Manufacturing and Transportation Technology
- Regional Director for Benton County
- Director of Extended Learning
- Director, Center for Accessibility Resources
- Director, STEM-HUB
- Director, Center for Teaching Excellence
- Manager, Curriculum and Scheduling
- Manager, Student Conduct and Retention
- Manager, Library and Learning Center
- Associate Dean of Arts, Social Sciences & Humanities
- Associate Dean of Academic Foundations
- Associate Dean of Healthcare
- Associate Dean of Science, Engineering & Math
- Associate Dean of Advanced Manufacturing and Transportation Technology

Meeting Schedule

Meetings are held once a month

BUDGET TEAM

Contact: Jess Jacobs, Director of Accounting and Budget

Membership

- Director of Accounting and Budget
- Manager of Budget, Payroll and Student Accounts
- Vice President, Finance and Operations
- Vice President, Academic and Student Affairs

Meeting Schedule

The team meets at least weekly during the budget development process, then bi-monthly for the balance of the year.

SECTION 4: ASSURING INSTITUTIONAL EFFECTIVENESS

In terms of governance, LBCC has councils in two spheres: Innovations and Operations. The councils in the Innovations sphere focus on pushing the college to try new ideas, each idea must have an evaluation plan the ability for easy expansion or termination based on evaluative findings. The Mission, Effectiveness, Resources, and Improvement Team (MERIT) oversees these councils, and ideas rise to MERIT for approval before moving over to the Operational sphere as part of standard operational procedures.

The councils in the Operations sphere focus on the day-to-day operations of our college. Operational councils are meant to embody tested and proven best practices and systems for managing the campus. The operational sphere is overseen by the College Council.

Councils within both spheres are expected to make use of committees and workgroups. Committees tend to focus on issues surrounding a particular topic or subset of topics within the broader mandate of the council. Workgroups, contrastingly, are limited-duration groups tasked with a particular challenge or issue.

Communication should travel both vertically from senior leadership to the oversight councils to the various work groups and committees as well as horizontally as committee members—chosen to represent a diverse set of individuals—share with the broader campus. By ensuring easy access and diversity in membership, councils and committees encourage the whole of the campus to be active participants in decision-making, with transparency for all.

MISSION, EFFECTIVENESS, RESOURCES, AND IMPROVEMENT TEAM (MERIT)

Purpose

MERIT uses annual and historic performance data to assess the extent to which we have achieved and/or are making progress toward the achievement of our Mission and Strategic Goals. They are responsible for:

- shepherding the College's work to remain fully accredited,
- monitoring the assessment of institutional success in fulfilling our mission,
- identifying areas needing to improve, and
- develop strategies for improvement

Contacts: Ann Buchele, Vice President, Academic and Student Affairs, and Justin Smith, Director, Office of Data and Decision Support

Membership

- Vice President, Academic and Student Affairs
- Executive Director, Institutional Advancement
- Director, Office of Data and Decision Support
- Representative, Student Leadership Council
- Representative, Faculty and Part-time Faculty
- Representative, Classified
- Representative, Progression Council
- Representative, Workforce Council
- Representative, Learning Innovation Council

Meeting Schedule

Meetings are held once a month

PROGRESSION COUNCIL

Purpose

To create and assess efforts in student recruitment and retention that improve certificate and degree completion in light of the MERIT Core Theme Metrics.

Contact: Justin Smith, Director, Office of Data and Decision Support

Membership

- Advising and Teaching Faculty
- Associate Dean, Admission, Records and Registration
- Director, Marketing and Communications
- Manager, Title III Grant
- Manager, Catalog, Curriculum and Scheduling
- Dean of Academic Foundations
- Chief Information Officer
- SLC Representative

- Others as voted onto Council by vote of the Council

Meeting Schedule

Meetings are held monthly on the third Thursday of each month.

WORKFORCE COUNCIL

Purpose

To enhance the economic vitality of our communities by ensuring the College is responsive to emerging workforce needs, and to provide coordinated contact for our business partners.

Contact: Ann Buchele, Vice President of Academic and Student Affairs

Membership

- Vice President of Academic and Student Affairs
- Dean of Healthcare
- Dean of Arts, Social Sciences and Humanities
- Associate Dean of Advanced Manufacturing and Transportation Technology
- Regional Director for Benton County
- Director, STEM Hub
- Financial Aid Director
- Cooperative Work Experience Director
- Extended Learning Director
- Career and Employment Specialist
- Research Analyst and Data Administrator
- Associate Dean of Science, Engineering and Math
- Full and Part-time Faculty

Meeting Schedule

First Friday of the month

LEARNING INNOVATION COUNCIL

Purpose

Responsible for assessing the effectiveness of teaching/learning strategies, introducing innovations in pedagogy, and developing professional development opportunities, in response to MERIT Core Theme Metrics.

Contact: Jess Winans, Director, Center for Teaching Excellence (Faculty)

Membership

- Center for Teaching Excellence Director (Faculty)
- First Year Experience Faculty
- Director, Office of Data and Decision Support
- Dean, Science, Engineering and Math
- Associate Dean, Arts, Social Sciences and Humanities
- Full and Part-time Faculty

Meeting Schedule

Second Wednesday of the month

SECTION 5: COMMITTEES/COUNCILS/TASK FORCE INFORMATION SPREADSHEET

The following is a link to a [spreadsheet](#) with committee, council, and task force membership list, purpose, and general meeting schedule.

Use of Nondiscrimination Statements at LBCC

[Who is this Document For?](#)

[Overview and Purpose](#)

[Comprehensive Statement Use Guidelines](#)

[Why We Use the Comprehensive Statement](#)

[When and How to Use the Comprehensive Statement](#)

[Notes About Use](#)

[Comprehensive Statement](#)

[Summary Statement Use Guidelines](#)

[When and How to Use the Summary Statement](#)

[Summary Statement](#)

Who is this Document For?

This guidance document should be used by those responsible for creating and publishing written and electronic material on behalf of LBCC, as well as for those responsible for planning, promoting, and executing events, to ensure alignment with these goals.

Overview and Purpose

Linn-Benton Community College is an equal opportunity educator and employer. As part of this commitment, we notify students, employees, potential students, potential applicants, and community members of this fact in an ongoing manner. One of the key ways we do this is through the publication of our nondiscrimination statement, found at linnbenton.edu/nondiscrimination. We are compelled by our own values and ethics, as well as federal and state law, to be transparent and forthright about our commitment to equal opportunity for all students and employees.

LBCC uses two statements to help communicate these expectations depending on publication type/purpose:

1. A **comprehensive statement** of non-discrimination for multipage publications that communicate admissions, recruitment, and other important access information, and
2. A brief **summary statement** for event fliers or one-page or less publications.

Following is the set of statements and guidelines regarding when to use each. Please reference linnbenton.edu/nondiscrimination for the most updated versions of these statements, as well as for the translated versions of these statements.

Comprehensive Nondiscrimination Statement Use Guidelines

Why We Use the Comprehensive Statement

The Office for Civil Rights (OCR) within the US Department of Education compels annual notification that the College prohibits discrimination on the basis of various protected statuses as outlined in Title VI of the *Civil Rights Act of 1964*, Title IX of the Education Amendments of 1972, the *Age Discrimination*

Act of 1975, and Title II of the *Americans with Disabilities Act*. Oregon law further prohibits discrimination on the basis of marital status and sexual orientation.

OCR directs that such notification of particular regulations may include public postings, a statement in local newspapers, alumni publications, and/or via written communication to students and employees. Under Title IX and Section 504, institutions receiving federal funding must also include the nondiscrimination statement in bulletins, announcements, publications, catalogs, application forms, and recruitment materials produced for students, participants, applicants, and employees.

When and How to Use the Comprehensive Statement

Given this, LBCC will publish the comprehensive non-discrimination statement in the following instances:

- For any multi-page documents (e.g., any document that is a page front-and-back or more) that communicate admissions, recruitment, or policy information to students or potential students, employees or potential employees, and participants and applicants, including (but not limited to):
 - Program bulletins
 - Announcements
 - LBCC Catalog
 - Handbooks
 - Application forms
 - Community-wide publications
 - Admissions and recruitment materials, postings, and applications
- Other special uses include:
 - Annually in local newspapers
 - Updated on key websites

Notes About Use

- In communities where a language other than English is primarily spoken, this statement should also be included in that primary language. (linnbenton.edu/nondiscrimination has approved translations of the comprehensive nondiscrimination statement in Spanish, Arabic, Russian, and Simplified Chinese. If these languages do not meet your needs under this provision, please contact childrj@linnbenton.edu).
- The above instances are when we are compelled to use the statement; however, note that nothing precludes LBCC from further advertising our commitment to non-discriminatory practices in other ways, including using this statement in non-required publications and materials, including course syllabi, on websites, and through other sources.
- **This statement complies with requirements set forth by OCR for combined requirements of notification and should not be altered or adjusted, but should be copied and used verbatim.**

Comprehensive Statement

LBCC Comprehensive Statement of Nondiscrimination

Linn-Benton Community College [does not discriminate](#) based on race, color, religion, ethnicity, use of native language, national origin, sex, sexual orientation, gender, gender identity, marital status, disability, veteran status, age, or any other status protected under applicable federal, state, or local laws in its programs or activities. For further information see [Board Policy 1015](#) and [Administrative Rule 1015-01](#). The following staff members have been designated to handle inquiries regarding the nondiscrimination policies:

For concerns or inquiries regarding disability accessibility and accommodations:

Contact: Carol Raymundo, Director of Center for Accessibility Resources
RCH-101, Albany Campus, Albany, OR 97321
(541) 917-4789
raymundo@linnbenton.edu

For concerns or complaints about the College or an LBCC staff member:

Contact: Scott Rolens, Director of Human Resource Development and Support and Title IX Coordinator
CC-108, Albany Campus, Albany, OR 97321
(541) 917-4425
rolens@linnbenton.edu

For concerns or complaints about a student:

Contact: Jill Childress, Manager for Student Conduct and Retention and Title IX Coordinator
WH-215, Albany Campus, Albany, OR 97321
(541) 917-4806
childrj@linnbenton.edu

Request for Special Needs or Accommodations

Direct questions about or requests for accommodations to the Center for Accessibility Resources, 541-917-4789 or cfar@linnbenton.edu at least three business days in advance for special events and as soon as possible for classroom or other emerging requests. LBCC will make every effort to honor requests. LBCC is an equal opportunity educator and employer.

Summary Statement Use Guidelines

When and How to Use the Summary Statement

In certain instances and circumstances (e.g., postcard mailings, limited word count, etc.), the LBCC comprehensive statement of nondiscrimination is not accessible or appropriate for the publication type. In these instances, LBCC will publish the summary non-discrimination statement utilizing these guidelines:

- Any single-page documents that communicate admissions, recruitment, or policy information to students or potential students, employees or potential employees, and participants and applicants; that advertise services, offerings, events, or information pertaining to student life or employee support.
- **On any advertisement for any event hosted at or sponsored by LBCC.**

Summary Statement

For accommodations requests, contact the Center for Accessibility Resources (CFAR) at [541-917-4789](tel:541-917-4789) or cfar@linnbenton.edu at least three business days in advance. LBCC does not discriminate based on any protected status in its programs or activities. For more information, visit linnbenton.edu/nondiscrimination.

For accommodations requests, contact the Center for Accessibility Resources (CFAR) at [541-917-4789](tel:541-917-4789) or cfar@linnbenton.edu at least three business days in advance. LBCC does not discriminate based on any protected status in its programs or activities. For more information, visit linnbenton.edu/nondiscrimination.

Para hacer solicitudes de adaptaciones, comuníquese con el Centro de Recursos de Accesibilidad (CFAR) al 541-917-4789 o a cfar@linnbenton.edu con menos tres días hábiles por adelantado. LBCC no discrimina basándose en ningún estatus protegido en sus programas o actividades. Para obtener más información, visite linnbenton.edu/nondiscrimination.

有关便利安排申请，请至少提前三个营业日致电 541-917-4789 或发送电子邮件到 cfar@linnbenton.edu，联系无障碍资源中心 (CFAR)。LBCC 在其课程或活动中不会因任何受保护的
身份而歧视任何人。详情请浏览网站 linnbenton.edu/nondiscrimination。

По вопросам предоставления приспособлений обращайтесь в Ресурсный центр по обеспечению доступа (CFAR) по телефону 541-917-4789 или cfar@linnbenton.edu не менее чем за три рабочих дня. Администрация LBCC не допускает дискриминации по признаку какого-либо защищенного статуса в своих программах или деятельности. Для получения дополнительной информации посетите linnbenton.edu/nondiscrimination.

لتقديم طلباتكم للتسهيلات اتصلوا بمركز الموارد المعنية بإمكانية الوصول (Center for Accessibility Resources: CFAR) على الرقم 541-917-4789 أو cfar@linnbenton.edu قبل ثلاثة أيام عمل على الأقل. لا تميز كلية LBCC ضد أي أحد على أساس أي وضع للحماية المؤقتة في برامجها أو أنشطتها. للمزيد من المعلومات، زوروا الموقع الإلكتروني linnbenton.edu/nondiscrimination

LBCC Comprehensive Statement of Nondiscrimination

Linn-Benton Community College [does not discriminate](#) based on race, color, religion, ethnicity, use of native language, national origin, sex, sexual orientation, gender, gender identity, marital status, disability, veteran status, age, or any other status protected under applicable federal, state, or local laws in its programs or activities. For further information see [Board Policy 1015](#) and [Administrative Rule 1015-01](#). The following staff members have been designated to handle inquiries regarding the nondiscrimination policies:

For concerns or inquiries regarding disability accessibility and accommodations:

Contact: Carol Raymundo, Director of Center for Accessibility Resources

RCH-101, Albany Campus, Albany, OR 97321

(541) 917-4789

raymundo@linnbenton.edu

For concerns or complaints about the College or an LBCC staff member:

Contact: Scott Rolens, Director of Human Resource Development and Support and Title IX Coordinator

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rolens@linnbenton.edu

For concerns or complaints about a student:

Contact: Jill Childress, Manager for Student Conduct and Retention and Title IX Coordinator

WH-215, Albany Campus, Albany, OR 97321

(541) 917-4806

childrj@linnbenton.edu

Request for Special Needs or Accommodations

Direct questions about or requests for accommodations to the Center for Accessibility Resources, [541-917-4789](tel:541-917-4789) or cfar@linnbenton.edu at least three business days in advance for special events and as soon as possible for classroom or other emerging requests. LBCC will make every effort to honor requests. LBCC is an equal opportunity educator and employer.

Solicitud para necesidades especiales o adaptaciones

Dirija preguntas acerca de adaptaciones o solicitudes de las mismas al Centro de Recursos de Accesibilidad, al 541-917-4789 o a cfar@linnbenton.edu con al menos tres días hábiles por antelación para eventos especiales y tan pronto como sea posible para clases u otros pedidos que surjan. LBCC hará todos los esfuerzos para satisfacer las solicitudes. LBCC es una institución de educación y empleo que ofrece igualdad de oportunidades.

Declaración completa LBCC de no discriminación

El colegio Linn-Benton Community College no discrimina por razones de raza, color, religión, grupo étnico, uso de idioma nativo, origen nacional, sexo, orientación sexual, género, identidad de género, estado civil, discapacidad, condición de veterano de las fuerzas armadas, edad ni ningún otro estatus protegido según las leyes federales, estatales o locales aplicables en sus programas ni actividades. Para obtener más información, consulte la [Política de la Junta Directiva 1015](#) y la [Norma Administrativa 1015-01](#). Los siguientes miembros del personal han sido designados para tratar las consultas sobre las políticas de no discriminación:

Por inquietudes o consultas sobre accesibilidad y adaptaciones en caso de discapacidad:

Contacto: Carol Raymundo, Directora del Centro para Recursos de Accesibilidad
RCH-101, Albany Campus, Albany, OR 97321
(541) 917-4789
raymundo@linnbenton.edu

Por inquietudes o quejas sobre el Colegio o un miembro del personal de LBCC:

Contacto: Scott Rolen, Director de Desarrollo y Apoyo de Recursos Humanos y Coordinador del Título IX
CC-108, Albany Campus, Albany, OR 97321
(541) 917-4425
rolens@linnbenton.edu

Por inquietudes o quejas sobre un estudiante:

Contacto: Jill Childress, Administradora para Conducta y Retención de Estudiantes y Coordinadora del Título IX
WH-215, Albany Campus, Albany, OR 97321
(541) 917-4848
childrj@linnbenton.edu

Quejas por discriminación u hostigamiento

Si cree que ha sido discriminado/a en cualquier interacción en el colegio Linn-Benton Community College, o ha sido hostigado(a) por otra persona mientras se encontraba en LBCC o desea manifestar una inquietud o queja, por favor vaya a esta página para hacer una denuncia: linnbenton.edu/report-it. Esta información y demás detalles pueden encontrarse en linnbenton.edu/nondiscrimination.

特殊需求或便利安排申请

请致电 541-917-4789 或发送电子邮件到 cfar@linnbenton.edu，将与便利安排有关的疑问或申请转交无障碍资源中心处理，如属特殊事项，请至少提前三个营业日告知，如属课堂或其他新提出的申请，请尽快告知。LBCC 将尽一切努力满足请求。LBCC 为平等机会教育者和雇主。

LBCC 不歧视综合声明

林恩-本顿社区学院在其课程或活动中不因种族、肤色、宗教、族裔、使用的母语、国籍、性、性取向、性别、性别认同、婚姻状况、残疾、退伍军人身份、年龄或受适用联邦、州或地方法律保护的任何其他身份而歧视任何人。有关更多信息，请参见[董事会政策 1015](#)和[行政规则 1015-01](#)。下列工作人员已获指定处理与不歧视政策有关的问询：

有关残疾人无障碍和便利安排的疑虑或问询：

请联系：Carol Raymundo，无障碍资源中心主任
RCH-101, Albany Campus, Albany, OR 97321
(541) 917-4789
raymundo@linnbenton.edu

有关学院或 LBCC 员工的疑虑或投诉：

请联系：Scott Rolan，人力资源开发和支持主任兼第九条协调员
CC-108, Albany Campus, Albany, OR 97321
(541) 917-4425
rolens@linnbenton.edu

有关学生的疑虑或投诉：

请联系：Jill Childress，学生行为和持续学业管理人兼第九条协调员
WH-215, Albany Campus, Albany, OR 97321
(541) 917-4848
childrj@linnbenton.edu

歧视或骚扰投诉

如果您觉得自己在林恩-本顿社区学院的任何互动中受到歧视，或在 LBCC 期间受到其他人的骚扰，或希望举报任何疑虑或投诉，请导航到此页面进行举报：linnbenton.edu/report-it。请登录网站 linnbenton.edu/nondiscrimination，了解该信息和更多详情。

Запрос о предоставлении услуг и приспособлений для лиц с особыми потребностями

Направляйте вопросы или запросы о предоставлении приспособлений в Ресурсный центр по обеспечению доступа, 541-917-4789 или cfar@linnbenton.edu по крайней мере за три рабочих дня до проведения специальных мероприятий или как можно скорее при проведении классных мероприятий или возникновении других запросов. Администрация LBCC (Linn-Benton Community College, Двухгодичный колледж Линн-Бентон) приложит все усилия, чтобы удовлетворить возникающие запросы. LBCC является поставщиком образовательных услуг и работодателем, предоставляющим равные возможности.

Развернутое заявление LBCC о недопущении дискриминации

Двухгодичный колледж Линн-Бентон не допускает дискриминации по признаку расы, цвета кожи, религии, этнической принадлежности, использования родного языка, национального происхождения, анатомического пола, сексуальной ориентации, социального пола, гендерной идентичности, семейного положения, инвалидности, статуса бывшего военнослужащего, возраста или любого другого статуса, защищенного применимыми федеральными, штатными или местными законами в организуемых учреждением программах или мероприятиях. Для получения дополнительной информации см. [Политику Совета директоров 1015](#) и [Административное правило 1015-01](#). Следующие сотрудники были назначены для обработки запросов относительно политики недопущения дискриминации:

По вопросам или запросам относительно предоставления доступа и приспособлений для лиц с особыми потребностями:

Свяжитесь с Кэрол Реймундо (Carol Raymundo), директором Ресурсного центра по обеспечению доступа
RCH-101, Albany Campus, Albany, OR 97321
(541) 917-4789
raymundo@linnbenton.edu

По вопросам или подаче жалоб против LBCC или его сотрудников:

Свяжитесь с Скоттом Роленом, (Scott Rolan), директором по развитию и поддержке кадровых ресурсов и координатором Раздела IX
CC-108, Albany Campus, Albany, OR 97321
(541) 917-4425
rolens@linnbenton.edu

По вопросам или подаче жалоб против студента(-ки):

Свяжитесь с Джилл Чилдресс (Jill Childress), менеджером Отдела по контролю поведения и удержанию студентов и координатором раздела IX
WH-215, Albany Campus, Albany, OR 97321
(541) 917-4848
childrj@linnbenton.edu

Жалобы о дискриминации или преследовании

Если вы считаете, что подверглись дискриминации в любой момент вашего посещения Двухгодичного колледжа Линн-Бентон, или подверглись преследованиям со стороны какого-либо лица в период обучения в LBCC, или хотели бы сообщить о проблеме или подать жалобу, перейдите на эту страницу, чтобы доложить об этом: linnbenton.edu/report-it. Эту и дополнительную информацию можно найти на linnbenton.edu/nondiscrimination.

طلب للاحتياجات الخاصة أو التسهيلات

وجهوا أسئلتكم أو طلباتكم للتسهيلات إلى مركز الموارد المعنية بإمكانية الوصول (Center for Accessibility Resources)،
541-917-4789 أو cfar@linnbenton.edu قبل ثلاثة أيام عمل على الأقل للمناسبات الخاصة وفي أسرع وقت ممكن لقاعة
الصف أو الطلبات الناشئة بهذا الشأن. ستبذل كلية LBCC قصارى جهدها لتلبية الطلبات. تلتزم كلية LBCC بالمساواة في تقديم فرص
التعليم والتوظيف.

التصريح الشامل لكلية LBCC المتعلق بعدم التمييز

لا تميز كلية لين-بينتون المجتمعية (Linn-Benton Community College) على أساس العرق، أو اللون، والدين، أو الإثنية، أو
استخدام لغة الأم، أو المنشأ القومي، أو الجنس، أو التوجه الجنسي، أو التوجه الجنسي، أو الحالة الزوجية، أو الإعاقة، أو وضع
المحاربين القدماء، أو السن، أو أي وضع آخر بموجب القوانين الفيدرالية وتلك الصادرة عن الولاية، والقوانين المحلية المعمول بها في
برامجها أو أنشطتها. للمزيد من المعلومات أنظروا [سياسة مجلس الإدارة رقم 1015](#) و [القاعدة الإدارية رقم 1015-01](#). لقد عُين أفراد
العمل التالية أسماؤهم لمعالجة الاستفسارات المعنية بسياسات عدم التمييز:

للمخاوف والاستفسارات المتعلقة بسهولة الوصول لذوي الإعاقات والتسهيلات:

جهة الاتصال: كارول رايمونديو (Carol Raymundo)، مديرة مركز الموارد المعنية بإمكانية الوصول
RCH-101, Albany Campus, Albany, OR 97321
(541 917-4789)

raymundo@linnbenton.edu

للمخاوف أو الشكاوي المتعلقة بالكلية أو أحد موظفيها:

جهة الاتصال: سكوت رولين (Scott Rolén)، مدير تنمية الموارد البشرية ودعمها ومنسق القسم التاسع (Title IX)
CC-108, Albany Campus, Albany, OR 97321
(541 917-4425)

rolens@linnbenton.edu

للمخاوف أو الاستفسارات المتعلقة بأحد الطلاب:

جهة الاتصال: جل تشايلدرس (Jill Childress)، للسلوك والاستبقاء الطلابي ومنسقة القسم التاسع (Title IX)
WH-215, Albany Campus, Albany, OR 97321
(541 917-4848)

childrj@linnbenton.edu

الشكاوي المتعلقة بالتمييز أو المضايقة

إذا تشعر أنك قد تعرضت للتمييز في أي نوع من التفاعل في كلية لين-بينتون المجتمعية، أو تشعر بأنك قد تعرضت للمضايقة من قبل
شخص آخر أثناء وجودك في كلية LBCC، أو إذا ترغب في الإبلاغ عن أية مخاوف أو شكوى، يُرجى التنقل إلى هذه الصفحة لتقديم
تقرير: linnbenton.edu/report-it. يمكن إيجاد هذه المعلومات وأية معلومات إضافية في الموقع الإلكتروني
linnbenton.edu/nondiscrimination.

Restriction of Directory Information

Office of Admissions & Records

Directory Information - What Is It?

Directory information includes your name, current mailing address, permanent address and telephone number(s), major field of study, dates of attendance, school or division of enrollment, degrees and awards received, participation in officially recognized activities and sports, weight and height if you are an athlete. All of this information may be released to a third party **unless you have requested confidentiality.**

How Do I Request Confidentiality?

You can request confidentiality by completing this form and returning it to the Admissions/Registration Office. If you work on campus you will automatically have a confidentiality placed on your record. You may request its removal.

What Does a 'Confidentiality Hold' Mean?

If you request confidentiality, no information about you - including the fact that you currently are a student at LBCC or have ever been enrolled at LBCC - will be released to anyone without your written authorization. Your name will not appear on news releases for the honor roll. It will not be listed on the commencement program. No information will be released to your spouse, your parents, your friends, to any newspaper, or to individuals such as prospective employers who are calling to verify your status at the college. (Note: Information may be shared with LBCC staff members who have a legitimate educational need.) Faculty will not contact you about assignments. You cannot call or e-mail LBCC to get information about your records. All transactions will need to be done with WebRunner, or in person. We will not be able to give any information to you except in person.

How Long Will 'Confidentiality' Remain in Effect?

The confidentiality "hold" will be permanent unless you request *in writing* that this restriction be removed. It will remain in effect after you have stopped attending LBCC. You can remove this restriction by completing another directory information form and marking the appropriate box.

Make a copy of this form for your records.

(cut along dotted line)

Directory Deletion Form

Student's Name (Please Print)

ID or SS#

- I do not wish to have directory information given about me. I understand this includes requests for address and phone information, verification of enrollment, newspaper publication of Honor Roll students, and newspaper publication of graduation candidates.

Student's Signature

Date

- Please remove the confidentiality hold from my name.

Students Signature

Date

For Official Use Only

Imaged: Date _____ \ Initial _____

**LINN-BENTON COMMUNITY COLLEGE
ALBANY, OREGON**

**ANNUAL FINANCIAL REPORT
Year Ended June 30, 2021**

**Dr. Lisa Avery, President
P. Sheldon Flom, Vice President, Finance and Operations
Jess Jacobs, Director, Accounting and Budget**

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INTRODUCTORY SECTION



November 8, 2021

The Board of Education
Linn-Benton Community College
Albany, Oregon 97321

The Annual Financial Report of Linn-Benton Community College for the fiscal year ended June 30, 2021, is submitted in accordance with Oregon Revised Statutes (ORS) 297.405 to 297.555 and 297.990, known as Municipal Audit Law. This report was prepared by the College's business office. The responsibility for the completeness and fairness of the data presented and all accompanying disclosures rests with the management of Linn-Benton Community College. We believe the report and its data are accurate and complete in all material aspects in disclosing the financial position and results of operations of Linn-Benton Community College as of June 30, 2021, and for the year then ended.

The Annual Financial Report is organized in four sections, as follows:

1. The Introductory Section contains the letter of transmittal with an overview of the college that includes factors affecting the financial condition and required supplementary information, a listing of principal officials, and the organization chart.
2. The Financial Section includes Management's Discussion and Analysis, the basic financial statements and accompanying notes as well as the independent auditor's report. A narrative introduction, overview and analysis are included in the Management's Discussion and Analysis in this section.
3. The College is required to have an annual single audit in conformity with the provisions of the Single Audit Act and Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Information related to the single audit, including the Schedule of Expenditures of Federal Awards and various independent auditors' reports, will be included in a separate report.
4. The Independent Auditor's Comments Section includes the auditor's comments required by the Minimum Standards for Audits of Oregon Municipal Corporations.

COLLEGE INFORMATION

Linn-Benton Community College is a comprehensive, two-year, public college serving the educational needs of residents in Linn and Benton counties. Established in 1966, the College offers Associates of Science, Associates of Arts, Associates of Applied Science, and Associate of General Studies degrees, vocational certificates and diplomas for high school completion. Additionally, the college partners with



business and industry to provide skills upgrading and seminars for employees and has an extensive offering of community education courses.

The college's 104-acre main campus is centrally located in the Mid-Willamette Valley, two miles south of Albany (population 54,935) and 11 miles east of Corvallis (population 59,730). The college has three extended learning centers located in the towns of Corvallis, Lebanon (population 17,335) and Sweet Home (Population 9,415). Total population for the two counties is approximately 221,985.

Albany is the county seat of Linn County and is recognized as the "hub of the Willamette Valley" due to its location at the junction of US Highways 99 and 20, and Interstate 5. Albany is 25 miles south of the Oregon state capitol, Salem, and 70 miles south of the state's largest city, Portland.

For the fiscal year 2020-21 the College's unduplicated head count was 11,936 and the number of full-time equivalent students was 4,048, lower compared to prior year. The number of full-time equivalent students was 5,784 in 2017-18, 5,539 in 2018-19, and 4,919 in 2019-20.

College Mission

"To engage in an education that enables all of us to participate in, contribute to, and benefit from the cultural richness and economic vitality of our communities."

Programs

Linn-Benton Community College has four major areas of study:

Career and Technical education trains students who want to qualify to work in specific fields.

College transfer courses prepare students who will continue their education at a four-year college or university. Linn-Benton offers a dual enrollment program with Oregon State University allowing students to take classes at either institution, or both, as best fits their needs , and progress towards their chosen degree.

Lifelong learning opportunities are presented through both credit and non-credit courses and workshops.

Developmental skill-building classes are offered for people who want to learn basic reading, writing, mathematics, and study skills, finish high school, or learn English as a second language.

Linn-Benton Community College provides comprehensive educational opportunities throughout the District. Classes and training opportunities are offered in Benton County at the Benton Center in Corvallis, and at the Lebanon Center, Sweet Home Center, Advanced Transportation Technology Center, and Health Occupations Center in Linn County. Linn-Benton Community College, in partnership with employers and community groups, offers classes at hundreds of locations throughout the district. In addition, distance education and online classes are offered to increase access to higher education opportunities.

Economy

The economic well-being, industrial structure and occupational mix vary considerably between Linn and Benton counties. Benton County's unemployment rates have consistently been among the lowest in the state (4.4% in June, 2021) while Linn County rates have been among the highest (6.3% in June, 2021). Benton County is home to Oregon State University and several high-tech companies including Hewlett-Packard. The per capita income of Benton County residents in 2020 was \$48,725 which was \$4,466 lower than the state per capita income of \$53,191. Linn County's primary industries are agriculture, timber (including lumber, plywood and paper products), rare metals and manufactured homes. The 2020 per capita income of Linn County residents was \$44,830 which was \$8,361 lower than the state per capita income.

Governing Bodies

The members of the Board of Education of Linn-Benton Community College are duly elected representatives of the people, pursuant to the statutes of Oregon and consistent with the rules of the Oregon Board of Education. They have statutory charge and control of all activities, operations and programs of the College including its property, personnel, and finances. The College is not a component unit of any other entity, nor does it have oversight of any component units. The Board of Education is composed of seven qualified members elected for four year terms. Members are elected from established zones within the two-county district.

Oregon State Board of Education

The Oregon State Board of Education is the agency that provides state-level regulation of Oregon's community college system. The Higher Education Coordinating Commission (HECC) is responsible for advising the Oregon Legislature, the Governor, and the Chief Education Office on higher education policy. The Board establishes state standards for educational programs and facilities and approves courses of study.

College Management

The President, appointed by the local Board of Education, is the Chief Executive Officer of the College and President/Clerk of the Linn-Benton Community College Board. The President, along with the administrative team administers policies set by the Linn-Benton Board of Education and collectively shares in working toward achieving the mission of the College.

Accreditation

Linn-Benton Community College received initial accreditation in 1972. Its accreditation was reaffirmed in 1982, 1992, 2002, and 2008. In 2010, the Commission revised its accreditation process to a seven year process. A full site visit and evaluation took place in the fall of 2016. The results of the report released in January 2017 listed six commendations and three recommendations for improvement none of which are fiscal in nature. Most recently the college received a mid-cycle evaluation in October 2019. The results were positive and no financial concerns were brought forward.

Internal Controls

Linn-Benton Community College management is responsible for establishing and maintaining an internal

control structure designed to ensure that the assets of the College are protected from loss, theft, or misuse and to ensure adequate accounting information is available for the preparation of the financial statements in conformity with generally accepted accounting principles. The internal control structure is designed to provide reasonable, but not absolute, assurance that these objectives are met. The concept of reasonable assurance recognizes that the cost of a control should not exceed the benefits likely to be derived and that the valuation of costs and benefits requires estimates and judgments by management.

Single Audit

As a recipient of state and federal financial assistance, Linn-Benton Community College is responsible for ensuring that an adequate internal control structure is established to ensure compliance with applicable laws and regulations related to those programs. This internal control structure is subject to periodic evaluation by management and outside auditors. As a part of Linn-Benton Community College's single audit, tests are made to determine the adequacy of the internal control structure, including that portion related to federal financial assistance programs, as well as to determine that Linn-Benton Community College has complied with applicable laws and regulations. The results of the College's single audit for the fiscal year ended June 30, 2021 will be included in a separate report.

Budgeting Controls

The Linn-Benton Community College Budget Committee is comprised of 14 members: seven appointed voters of the College district and the seven elected Board of Education members, each representing one of seven zones. Appointments to the Budget Committee are made by the Board. Appointed members serve three-year terms. It is the duty of the Budget Committee to analyze and approve the College's proposed operating budget and forward its recommendations to the Board for final consideration. As a part of the budget review and approval process, the Budget Committee holds public meetings at which citizens of the community are invited to give testimony on the budget before it is approved by the Budget Committee. Following approval of the budget by the Budget Committee, the Linn-Benton Board of Education holds a public hearing on the budget. The purpose of this hearing is to provide the citizens of the community an opportunity to give testimony on the budget approved by the Budget Committee before it is adopted by the Linn-Benton Board of Education. The Budget Committee does not act on educational and personnel matters but only on fiscal matters.

Additionally, Linn-Benton Community College maintains budgetary controls to ensure compliance with legal provisions embodied in the annual appropriated budget approved by the Linn-Benton Board of Education. Activities of all funds are included in the annual appropriated budget. The level of budgetary control (that is, the level at which expenditures cannot legally exceed the appropriated amount) is established at the sub-object level; i.e., personal services, materials and services, capital outlay, transfers out, debt service and operating contingency within an individual fund. Transfers of appropriations between existing budget categories can be authorized by resolution of the Linn-Benton Board of Education.

Factors Affecting Financial Condition

Measure 5 and 50 resulted in the College being assigned a permanent tax rate of .5019 per \$1000 of assessed value and restricts future annual increases in assessed property values to a cap of no more than three percent. Prior to the two measures, the College received approximately 46 percent of its general fund revenue from local property taxes. Currently the College receives approximately 17 percent from local property taxes.

State funding has replaced property taxes as the primary revenue source for the college. Increases in state funding are subject to larger shifts in the state budget and are further impacted by legislation affecting the tax model the state relies upon. The college monitors the condition of the state budget and balances the overall mix of revenue with tuition affordability concerns. The state has approved a CCSF funding level of \$714.2 million for the 2021-23 biennium which provided stabilizing state support amidst pandemic-related enrollment challenges. State revenues remain robust as the economy recovers and commerce reopens which bodes well for continued, stable levels of State support. However, the impact on enrollment through the remaining pandemic and beyond remains a challenge.

General Obligation Bonds

In November 2014, a bond issue in the amount of \$34.0 million was passed by the voters to fund capital construction and improvements and was sold in February 2015. The principal balance at June 30, 2021, was \$26,035,000. Detailed debt repayment schedules appear in Note 4 of this financial report.

Pension Obligation Bonds

In February 2004, the College issued \$29.235 million of Limited Tax Pension Obligation Bonds and transferred the net proceeds to the State of Oregon Public Employees Retirement System to cover a portion of the College's share of the cost sharing plan's unfunded actuarial liability. Principal payments are due annually beginning in June 2008 through June 30, 2028 and interest is payable in December and June of each year with rates ranging from 4.75% to 5.53%.

Full Faith and Credit Obligations/Financing Agreement

In May 2007, the College issued full faith and credit obligations totaling \$3.1 million. Principal payments are due annually beginning in the 2007-08 fiscal year and continuing through fiscal year 2026-27. Interest rates range from 4.00% to 5.00%.

In April 2008, the College issued full faith and credit obligations totaling \$3.5 million. Principal payments are due annually beginning in the 2008-09 fiscal year and continuing through fiscal year 2027-28 with interest rates ranging from 3.25% to 5.00%.

In February 2017, the College issued a financing agreement with a private bank totaling \$4.2 million, the proceeds of which were used to advance refund \$1.9 million of Series 2007 Full Faith and Credit Obligations and \$2.1 million of Series 2008 Full Faith and Credit Obligations. This constituted all remaining Series 2007 Obligations and all but \$165,000 of the remaining Series 2008 Obligations. The remaining Series 2008 Obligations were paid by the College during 2017-18 along with interest of \$8,250. The College advance refunded these obligations to reduce its total debt service payments over the life of the Series 2017 Financing Agreement by \$247,406.

In 2021, the College issued full faith and credit obligations totaling \$7.1 million. Principal payments are due annually beginning in the 2021-22 fiscal year and continuing through fiscal year 2034-35. The interest rate is fixed at 3.00%.

Cash Management

The College maintains a cash management program with the aim of maximizing interest earnings while safeguarding capital. Available cash resources are invested and collateralized in accordance with College Board of Education guidelines and applicable Oregon Revised Statutes. The College is restricted by Oregon Revised Statutes as to the types of investments in which it may invest its cash balances. Statutes authorize the College to invest in obligations of the U.S. Treasury, agencies, and instrumentalities; corporate

indebtedness; bankers' acceptances; repurchase agreements, and the state treasurer's investment pool. Additionally, state statutes require that amounts on deposit with financial institutions be secured at a rate of at least 10% of amounts in excess of deposit insurance coverage. College funds are pooled and invested to the fullest extent possible. Interest earnings on pooled cash and investments are allocated to the various funds based on monthly inter-fund balances.

Risk Management

Linn-Benton Community College's workers' compensation report reflects a proactive record of managing claims and a favorable time-loss record. This can be attributed to LBCC's focus on campus safety awareness and the instigation of an early return to work process.

The College has a Safety Committee, which is an advisory committee for safety education, hazard communication, hazard identification, and risk assessment and reduction. The committee is charged by the college with the purpose of enhancing the safety culture at the college by thinking strategically about college-wide safety and loss prevention issues and to make policy and procedural recommendations regarding safety and health issues.

The College purchases insurance from commercial vendors for workers' compensation, property/casualty and liability coverage. In addition, our very active Wellness Committee provides programs that are available to all employees.

Independent Audit

State statutes require an annual audit by independent certified public accountants. The Linn-Benton Board of Education selected the accounting firm of Kenneth Kuhns & Co. to conduct the annual audit. In addition to meeting the requirements set forth in Oregon statutes, the audit also was designed to meet the requirements of *Government Auditing Standards* and the Uniform Guidance.

Acknowledgments

We wish to express our appreciation to the entire business office staff for their efforts and contributions to our Annual Financial Report. We also thank the members of the Linn-Benton Board of Education for their support and dedication to the financial operations of the college.

Sincerely,



Dr. Lisa Avery
President



Sheldon Flom
Vice President,
Finance & Operations



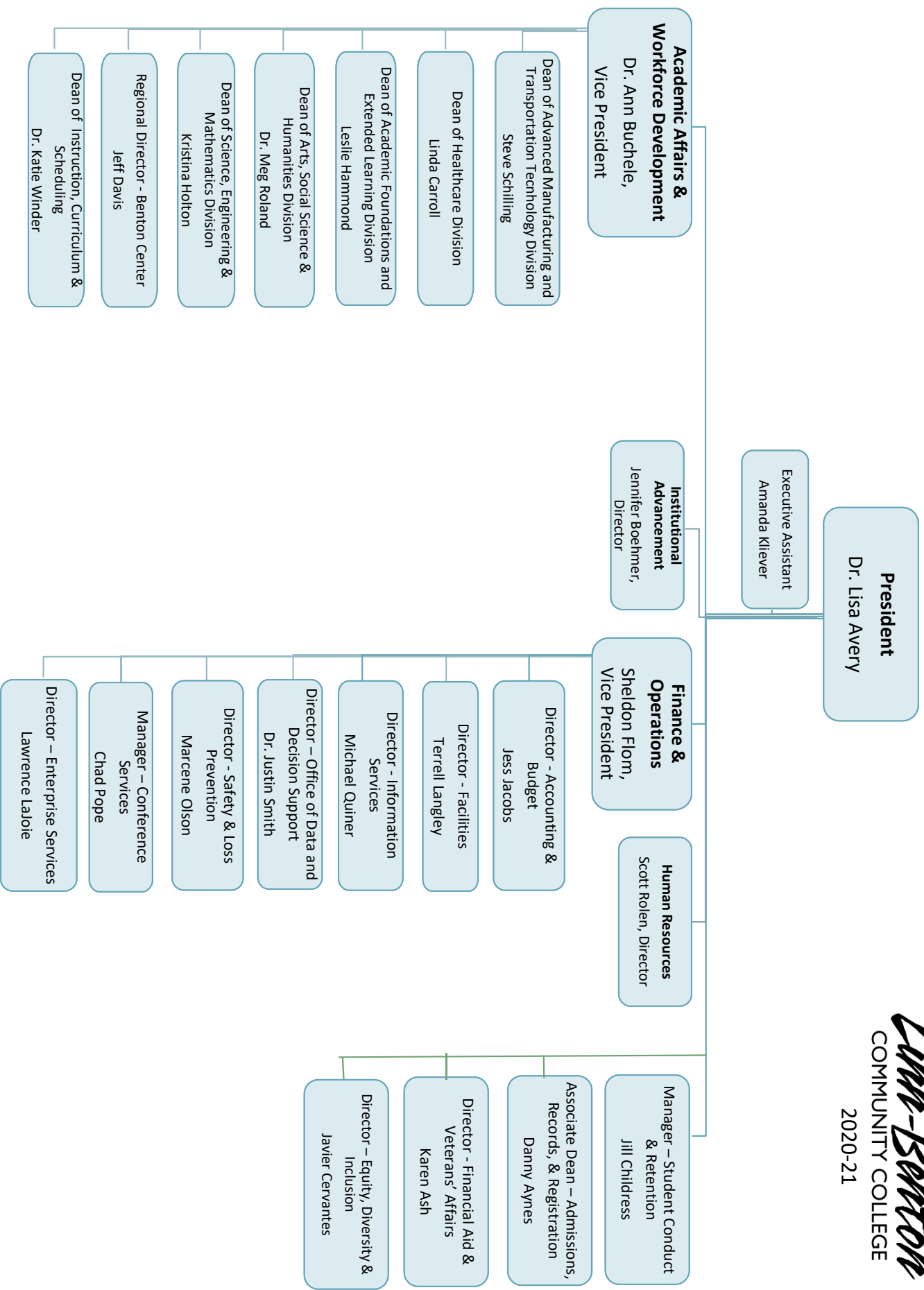
Jess Jacobs
Director,
Accounting & Budget

LINN-BENTON COMMUNITY COLLEGE

June 30, 2021

Board of Education

| <u>Official</u> | <u>Address</u> | <u>Office</u> |
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FINANCIAL SECTION

KENNETH KUHNS & CO.
CERTIFIED PUBLIC ACCOUNTANTS
570 LIBERTY STREET S.E., SUITE 210
SALEM OREGON 97301-3594
TELEPHONE (503) 585-2550

INDEPENDENT AUDITOR'S REPORT

November 8, 2021

Board of Education
Linn-Benton Community College
Albany, Oregon

Report on the Financial Statements

We have audited the accompanying financial statements of Linn-Benton Community College as of and for the year ended June 30, 2021, and Linn-Benton Community College Foundation, its discretely presented component unit, as of and for the year ended December 31, 2020, and the related notes to the financial statements, which collectively comprise Linn-Benton Community College's basic financial statements as listed in the table of contents.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditor's Responsibility

Our responsibility is to express opinions on these financial statements based on our audit. We conducted our audit 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 we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinions.

Opinions

In our opinion, the financial statements referred to above present fairly, in all material respects, the respective financial position of Linn-Benton Community College as of June 30, 2021, and Linn-Benton Community College Foundation as of December 31, 2020, and the respective changes in financial position and, where applicable, cash flows thereof for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Other Matters

Required Supplementary Information

Accounting principles generally accepted in the United States of America require that management's discussion and analysis and the required supplementary information as listed in the table of contents be presented to supplement the basic financial statements. Such information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

Other Supplementary Information and Other Information

Our audit was conducted for the purpose of forming opinions on the financial statements that collectively comprise Linn-Benton Community College's basic financial statements. The other supplementary information listed in the table of contents and introductory section are presented for purposes of additional analysis and are not a required part of the basic financial statements.

The other supplementary information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the basic financial statements. Such information has been subjected to the auditing procedures applied in the audit of the basic financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the other supplementary information is fairly stated in all material respects in relation to the basic financial statements as a whole.

The introductory section has not been subjected to the auditing procedures applied in the audit of the basic financial statements and, accordingly, we do not express an opinion or provide any assurance on it.

Reports on Other Legal and Regulatory Requirements

Other Reporting Required by Government Auditing Standards

In accordance with *Government Auditing Standards*, we have also issued our report dated November 8, 2021 on our consideration of Linn-Benton Community College's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering Linn-Benton Community College's internal control over financial reporting and compliance.

Other Reporting Required by Oregon State Regulations

In accordance with the Minimum Standards for Audits of Oregon Municipal Corporations, we have also issued our report dated November 8, 2021 on our consideration of Linn-Benton Community College's internal control over financial reporting and on our tests of its compliance with certain provisions of laws and regulations, including the provisions of Oregon Revised Statutes as specified in Oregon Administrative Rules. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the internal control over financial reporting or on compliance.

Kenneth Kuhns & Co.

Kenneth Kuhns & Co.

MANAGEMENT'S DISCUSSION AND ANALYSIS

MANAGEMENT'S DISCUSSION AND ANALYSIS

This section of Linn-Benton Community College's (the College) Annual Financial Report (AFR) presents an analysis of the financial position and activities of the College for the fiscal year ended June 30, 2021. This report has been prepared by management along with the financial statements and related footnote disclosures and should be read in conjunction with them. Consequently, management assumes full responsibility for the completeness and reliability of all the information presented in this report. This discussion is designed to focus on current activities, resulting changes and current known facts.

Accounting Standards

The financial statements have been prepared in accordance with Governmental Accounting Standards Board Statement No. 35, *Basic Financial Statements – and Management’s Discussion and Analysis – For Public Colleges and Universities* which was adopted in November, 1999. The College was required to adopt this standard for the fiscal year ended June 30, 2003. The College implemented Statement No. 63, *Financial Reporting of Deferred Outflows of Resources, Deferred Inflows of Resources, and Net Position* for the fiscal year ended June 30, 2012. The College implemented Statement No. 68, *Accounting and Financial Reporting for Pensions* for the fiscal year ended June 30, 2015. The financial statements also include the College’s independent Foundation as of December 31, 2020 in accordance with Governmental Accounting Standards Board Statement No. 39, *Determining Whether Certain Organizations Are Component Units*. Under the standard, state and local governments that have qualifying fundraising foundations are required to include, through discrete presentations, the financial activities of those foundations in their financial statements.

Using the Financial Statements

This annual report consists of three parts-management’s discussion and analysis (this section), the basic financial statements and supplementary information. The financial statements focus on the College as a whole and are designed to emulate corporate presentation models whereby all of the College’s activities are consolidated into one total. The statements are prepared in accordance with the accrual basis of accounting. The entity wide statements are comprised of the following:

- The *Statement of Net Position* presents the College’s total assets and deferred outflows and liabilities and deferred inflows, with the difference between the two reported as *net position*. Over time, increases or decreases in the net position are indicators of the improvement or deterioration of the College’s financial health when considered along with non-financial facts such as enrollment levels and the condition of the facilities.
- The *Statement of Revenues, Expenses and Changes in Net Position* presents the revenues earned and the expenses incurred during the year. All changes in net position are reported under the accrual basis of accounting, or as soon as the underlying event giving rise to the change occurs regardless of the timing when the cash is received or occurred. Thus, revenues and expenses are reported in this statement for some items that will result in cash flows in future fiscal periods. The utilization of long-lived assets is reflected in the financial statements as depreciation, which amortizes the cost of the capital asset over the expected useful life. Revenues and expenses are reported as either operating or non-operating. The primary sources of operating revenues include tuition, grants and contracts. State appropriations and property taxes are classified as non-operating revenues. Because

of the College's dependency on state aid and property tax revenue, this statement presents an operating loss.

- The *Statement of Cash Flows* presents information on cash flows from operating activities, noncapital financing activities, capital financing activities and investing activities. It provides the net increase or decrease in cash between the beginning and end of the fiscal year. This statement assists in evaluating the College's ability to meet financial obligations as they become due.
- The *Notes to the Basic Financial Statements* provide additional information that is essential to a full understanding of the data provided in the entity wide financial statements.

Financial Highlights

The College's financial position at June 30, 2021 shows assets and deferred outflows of \$135,894,898, liabilities and deferred inflows of \$123,965,808 and net position of \$11,929,090, which was an decrease from the prior year of \$8,989,023. This was primarily due to fluctuations in state support described below and fluctuations from net pension liability reporting changes through GASB 68. This adjustment, which is based on actuarial assumptions used throughout the Public Employees Retirement System, dramatically impacts expense categories and reduces unrestricted net position. These reporting requirements are designed to create transparency regarding the college's portion of the unfunded liability for the larger system in which it participates. The related adjustments do not have a direct impact on budget based reporting as shown in schedules 1 through 8.

A second large adjustment for the 2020-21 statements is based on a senate bill passed by the Oregon legislature in 2003 delaying the final quarterly payment to community colleges for the last year of every biennium. For 2020-21 that final payment of \$5,816,951 was received in July 2021 and therefore was not included in the College's financial statements for 2020-21. The College received three quarterly payments in 2020-21 compared to five quarterly payments received in 2019-20. The delayed payment of state funding has the effect of decreasing current assets in odd numbered years and increasing them in even numbered years.

The 2020-21 budget was developed with considerable college-wide participation. Cost reductions were implemented in 2019-20 and 2020-21 in response to the uncertainty around State funding due to COVID-19 and the potential impact on funding in the second year of the 2019-21 biennium.

The College's largest net position reflects the amount invested in capital assets, e.g., land, buildings, and machinery and equipment, less any outstanding related debt used to acquire the assets, plus remaining bond proceeds held for construction.

Current assets have decreased with projects based on the February 2015 general obligation bond coming online along with related cash outlays on remaining construction. This decrease was exacerbated by the delayed payment strategy for state funds as the second year of the biennium produces 3 of the 8 biennial payments.

Analysis of the Statement of Net Position

The Statement of Net Position includes all assets and liabilities of the College using the accrual basis of accounting. Net position is the difference between assets and liabilities, and is one measure of the financial condition of the College.

(in thousands of dollars)

| | 2021 | 2020 |
|---|-----------|-----------|
| Assets | | |
| Current assets | \$20,041 | \$22,427 |
| Noncurrent assets | 99,285 | 94,854 |
| Total assets | \$119,326 | \$117,281 |
| Deferred Outflows of Resources | | |
| Deferred outflows related to pensions | \$16,522 | \$13,297 |
| Deferred loss on refunding | 47 | 54 |
| Total deferred outflows of resources | \$16,569 | \$13,351 |
| Liabilities | | |
| Current liabilities | \$14,793 | \$14,037 |
| Long-term debt, non-current portion | 51,859 | 49,263 |
| Pension transition liability | 2,687 | 3,189 |
| Net pension liability | 49,404 | 37,133 |
| Other non-current liabilities | 691 | 865 |
| Total liabilities | \$119,434 | \$104,487 |
| Deferred Inflow of Resources | | |
| Deferred inflows related to pensions | \$4,532 | \$5,226 |
| Total deferred inflows of resources | \$4,532 | \$5,226 |
| Net Position | | |
| Net investment in capital assets | \$60,026 | \$60,881 |
| Restricted | 1,812 | 1,401 |
| Unrestricted | (49,909) | (41,364) |
| Total net position | \$11,929 | \$20,918 |

Current assets include cash and investments from operations. The College's current assets of \$20.0 million are sufficient to cover the College's current liabilities of \$14.8 million. This represents a current ratio of 1.4. Receivables consist of taxes, student accounts, interest and various operating receivables. The College's non-current assets are its investment in capital assets of \$92.5 million, net of depreciation, plus cash and investments restricted for capital construction of \$6.7 million.

The College's current liabilities primarily consist of accounts payable, payroll and payroll taxes payable, vacation payable, unearned revenue from tuition and fees, and the current portion of long-term debt. The non-current liabilities consist mainly of pension liabilities of \$49.4 million and long-term debt from the issuance of general obligation bonds of \$26.0 million and the pension obligation bonds long-term debt of \$17.8 million.

The majority of the College's net position is the \$60.0 million net investment in capital assets. The College's restricted net position consists of amounts set aside for contracted programs, financial

aid, and debt service. The College's unrestricted net position consists of amounts for the continuing operation of the College.

Analysis of the Statement of Revenues, Expenses and Changes in Net Position

The Statement of Revenues, Expenses and Changes in Net Position presents the operating results of the College as well as the non-operating revenues and expenses. Annual state reimbursements and property taxes, while budgeted for operations, are considered non-operating revenues according to accounting principles generally accepted in the United States of America (GAAP).

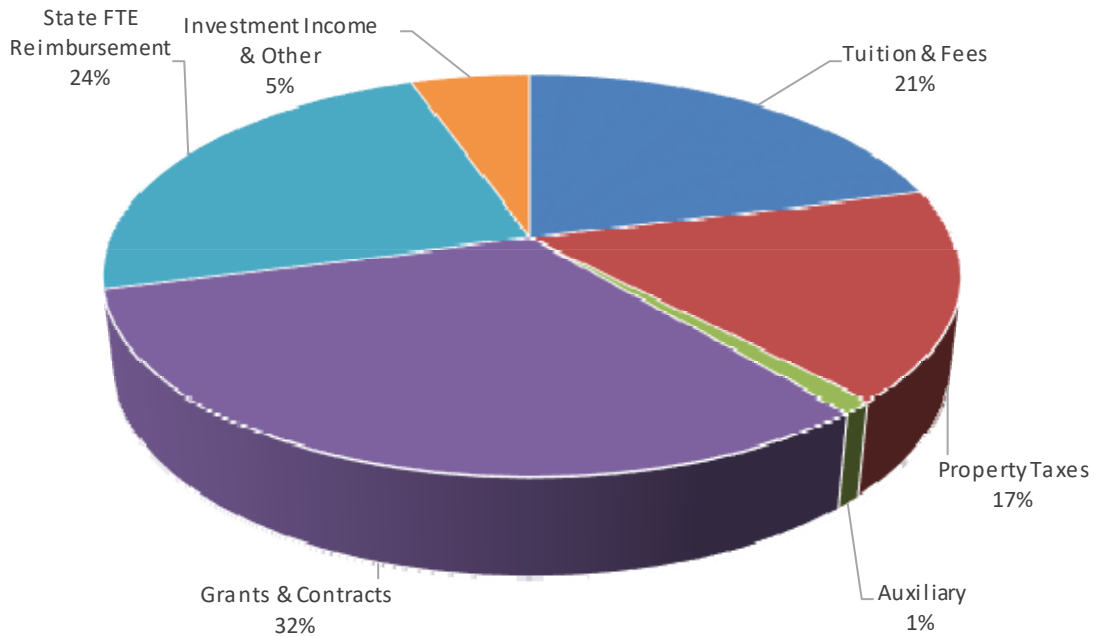
Changes in Linn-Benton Community College's Net Position

| (in thousands of dollars) | 2021 | Percent of total revenue/expense | 2020 |
|--|-----------------------|-------------------------------------|---------------------|
| Revenues | | | |
| Tuition & fees, net | \$15,647,887 | 21.1% | \$17,109,496 |
| Student Financial Aid | 9,371,712 | 12.6% | 11,074,912 |
| Intergovernmental grants/contracts | 14,466,605 | 19.5% | 6,319,163 |
| Campus Store sales | 739,406 | 1.0% | 1,380,846 |
| Food Service sales | 1,175 | 0.0% | 443,087 |
| Printing Services sales | 40,825 | 0.1% | 87,099 |
| Other operating revenue | 3,819,311 | 5.1% | 4,071,584 |
| Total operating revenue | 44,086,921 | 59.4% | 40,486,187 |
| State community college support | 17,473,138 | 23.6% | 28,706,821 |
| Property taxes | 12,408,558 | 16.7% | 11,983,893 |
| Interest Income | 195,614 | 0.3% | 460,054 |
| Total nonoperating revenue | 30,077,310 | 40.6% | 41,150,768 |
| Total revenues | 74,164,231 | 100.0% | 81,636,955 |
| Expenses | | | |
| Instruction | 37,258,529 | 44.8% | 37,196,692 |
| Instructional support | 7,503,457 | 9.0% | 6,711,131 |
| College support services | 11,702,694 | 14.1% | 11,183,195 |
| Student services | 8,191,991 | 9.8% | 7,041,216 |
| Community services | 192,400 | 0.2% | 192,200 |
| Scholarships and grants | 7,074,381 | 8.5% | 6,656,963 |
| Plant operations | 5,171,506 | 6.2% | 5,081,932 |
| Auxiliary | 0 | 0.0% | 2,933,348 |
| Depreciation | 3,945,828 | 4.7% | 3,749,265 |
| Total operating expenses | 81,040,786 | 97.4% | 80,745,942 |
| Interest expense | 2,387,199 | 2.9% | 2,465,639 |
| Amortization of debt premiums | (314,234) | -0.4% | (285,128) |
| Debt issuance costs | 108,424 | 0.1% | 0 |
| Loss on disposal of capital assets | 2,391 | 0.0% | 25,624 |
| Total nonoperating expenses | 2,183,780 | 2.6% | 2,206,135 |
| Total expenses | 83,224,566 | 100.0% | 82,952,077 |
| Excess/(deficiency) before special items | (9,060,335) | | (1,315,122) |
| Capital contributions | 71,312 | | 10,500,000 |
| Increase/(decrease) in net position | \$ (8,989,023) | | \$ 9,184,878 |

Revenues:

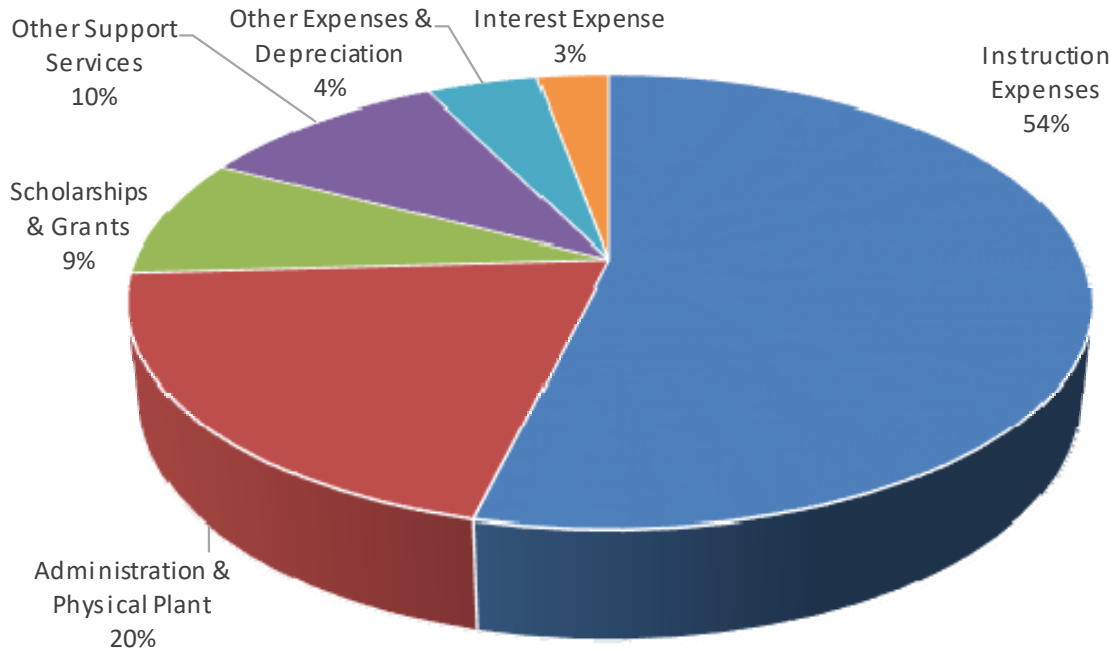
The most significant sources of operating revenue for the College are federal, state and local grants and contracts (including student financial aid) and student tuition and fees. Tuition and fees totaled \$15,647,887, a decrease of 8.5%. Student financial aid decreased at a rate of 15.4% and intergovernmental grants and contracts increased by 128.9%. Revenue from Campus Store sales totaled \$793,406. Declining revenue has been attributable to decreased enrollment and the increased availability of open educational resources and other purchasing/rental arrangements surrounding affordable textbooks.

The largest non-operating revenue source is from the State of Oregon. Biennially, the state appropriates funding for community colleges. The College received \$17,473,138 for FTE reimbursement allocation in this fiscal year. This amount is \$11,233,683 less than the College received in fiscal year 2019-20 due to the quarterly payment adjustment. Additional non-operating revenues of \$12,408,558 were received from property taxes the College levied, an increase of 3.5%. The following graph shows the allocation of revenues for the College:



Expenses:

Expenses for fiscal year 2020-21 totaled \$83,224,566, an increase of 0.3%. Academic services represent the largest percentage of total at \$44,761,986. Grants and scholarships awarded to students totaled \$7,074,381 which was an increase of 6.3%. Plant operations increased by 1.8%. The following graph shows the allocation of expenses for the College:



As mentioned prior, adherence to GASB Statement No. 68, *Accounting and Financial Reporting for Pensions* required a substantial adjustment to net pension liability and related expenses. This accounting adjustment does not reflect budgetary spending by the college. The chart below shows 2021 expenses prior to the pension adjustments and compares to prior year.

| | 2021 Expenses prior to pension adjustments | 2020 Expenses prior to pension adjustments | Total percentage change |
|---------------------------|--|--|-------------------------------|
| (in thousands of dollars) | | | |
| Instruction | \$ 34,109 | \$ 34,317 | -0.6% |
| Instructional support | 7,000 | 6,272 | 11.6% |
| College support services | 10,985 | 10,533 | 4.3% |
| Student services | 7,593 | 6,454 | 17.6% |
| Scholarships and grants | 7,069 | 6,639 | 6.5% |
| Plant Operations | 4,957 | 4,902 | 1.1% |
| Auxiliary | 0 | 2,933 | -100% |

Analysis of the Statement of Cash Flows

This statement provides an assessment of the financial health of the College. Its primary purpose is to provide relevant information about the cash receipts and cash payments of the College during a period. The statement of cash flows also helps users assess the ability of the College to meet obligations as they become due and the need for external financing.

| | (in thousands of dollars) | |
|---------------------------------|---------------------------|-------------|
| | 2021 | 2020 |
| Cash provided by (used in): | | |
| Operating activities | \$ (26,253) | \$ (29,183) |
| Noncapital financing activities | 23,867 | 34,878 |
| Capital financing activities | 1,825 | (605) |
| Investing activities | 195 | 460 |
| Net increase(decrease) in cash | (366) | 5,550 |
| Cash -- Beginning of year | 19,859 | 14,310 |
| Cash -- End of year | \$ 19,493 | \$ 19,859 |

The major sources of funds included in the operating activities include student tuition and fees, student financial aid, and grants and contracts. Major uses were payments made to employees and suppliers, and for student financial aid and other scholarships.

State reimbursements and property taxes are the primary source of non-capital financing. The current accounting standards require that we reflect these sources of revenue as non-operating even though the College's budget depends on these revenues for operations. Property taxes are assessed to property owners within the College's tax base. The primary financing activities were the purchase of capital assets, property taxes levied for capital debt, and principal and interest on capital long-term debt.

Capital Assets and Debt Administration

Capital Assets

The College's investment in capital assets as of June 30, 2021 amounts to \$92,555,049 net of accumulated depreciation. Investment in capital assets includes land, buildings, improvements, machinery and equipment, art and historical treasures, library collections and land improvements. More detailed information about the College's capital assets is included in Note 3 to the financial statements.

Long Term Debt

At the end of fiscal year 2021, the College had total debt outstanding of \$110,430,550. Of this amount \$26,035,000 represents general obligation bonds, \$2,602,070 in premiums on general obligation bonds, \$17,840,000 in pension obligation bonds, \$1,193,741 in termination benefits, \$2,686,668 in pension transition liability, \$49,403,889 in net pension liability, \$2,786,204 in the financing agreement, and \$7,882,978 in full faith and credit obligations.

State statutes limit the amount of the general obligation debt the College may issue to 1.5% of Real Market Value of properties within the college district. The current legal debt limit is \$610,253,457, which is significantly higher than the College's outstanding general obligation debt. The College's outstanding general obligation debt is approximately 4.27% of the legal debt limit. More detailed information about the College's long term debt is included in Note 4 to the financial statements.

Economic Factors and Next Year's Budget

The impact of COVID-19 began with the Spring term for 2019-20 and continues on into 2021-22. Enrollment during the pandemic has continued the trend of enrollment decline dating back to 2011-12 but has created steeper declines. These declines have created substantial strain on tuition revenue. Though Federal COVID relief funds have enabled a portion of this revenue to be recaptured and, thus, buoyed the College's fund balance, consideration must be given to the longer-term impact on operating budgets with this reduced level of enrollment. This will be of primary importance in building the 2022-23 budget.

Requests for Information:

This financial report is designed to provide a general overview of Linn-Benton Community College's finances. Questions concerning any of the information provided in this report or requests for additional financial information should be addressed to:

Accounting Services
Linn-Benton Community College
6500 SW Pacific Blvd.
Albany, OR 97321

BASIC FINANCIAL STATEMENTS

LINN-BENTON COMMUNITY COLLEGE

Statement of Net Position
June 30, 2021

| | <u>College</u> | <u>Foundation (Component Unit) as of 12/31/20</u> |
|--|--------------------|---|
| <u>Assets</u> | | |
| Current assets: | | |
| Cash and investments | \$ 12,763,692 | \$ 422,630 |
| Receivables, net: | | |
| Property taxes | 405,914 | - |
| Accounts/grants | 6,678,119 | 10,114 |
| Loans | 18,368 | - |
| Inventories | 174,196 | - |
| Prepaid expenses | 475 | 9,536 |
| | <u>20,040,764</u> | <u>442,280</u> |
| Total current assets | | |
| Noncurrent assets: | | |
| Restricted cash and investments | 6,730,028 | - |
| Investments primarily in equity mutual funds and real estate | - | 10,790,898 |
| Investments in property and equipment | - | 577,619 |
| Investments held by others | - | 288,681 |
| Non-depreciable capital assets | 16,051,471 | - |
| Depreciable capital assets, net | 76,503,578 | - |
| | <u>99,285,077</u> | <u>11,657,198</u> |
| Total noncurrent assets | | |
| | <u>119,325,841</u> | <u>12,099,478</u> |
| Total assets | | |
| <u>Deferred Outflows of Resources</u> | | |
| Deferred outflows related to pensions | 16,522,206 | - |
| Deferred loss on refunding | 46,851 | - |
| | <u>16,569,057</u> | <u>-</u> |
| Total deferred outflows of resources | | |
| | <u>135,894,898</u> | <u>12,099,478</u> |
| Total assets and deferred outflows of resources | | |

(Continues)

LINN-BENTON COMMUNITY COLLEGE

Statement of Net Position
June 30, 2021

| | <u>College</u> | <u>Foundation (Component Unit) as of 12/31/20</u> |
|--|----------------------|---|
| <u>Liabilities</u> | | |
| Current liabilities: | | |
| Accounts payable | \$ 2,543,721 | \$ 343,496 |
| Payroll payable | 3,574,260 | - |
| Vacation payable | 1,742,226 | - |
| Accrued interest payable | 102,344 | - |
| Due to others | 106,998 | - |
| Unearned revenue | 933,616 | - |
| Current maturities of long-term obligations | <u>5,790,139</u> | <u>-</u> |
| Total current liabilities | <u>14,793,304</u> | <u>343,496</u> |
| Noncurrent liabilities - long-term obligations: | | |
| General obligation bonds payable | 26,035,000 | - |
| Premium on general obligation bonds payable | 2,602,070 | - |
| Pension bonds payable | 17,840,000 | - |
| Full faith and credit obligations payable | 6,905,000 | - |
| Premium on full faith and credit obligations payable | 977,978 | - |
| Financing agreement | 2,786,204 | - |
| Termination benefits | 1,193,741 | - |
| Net pension liability | 49,403,889 | - |
| Pension transition liability | <u>2,686,668</u> | <u>-</u> |
| Total long-term obligations | 110,430,550 | - |
| Less current maturities | <u>(5,790,139)</u> | <u>-</u> |
| Total noncurrent liabilities - long-term obligations | <u>104,640,411</u> | <u>-</u> |
| Total liabilities | <u>119,433,715</u> | <u>343,496</u> |
| <u>Deferred Inflows of Resources</u> | | |
| Deferred inflows related to pensions | <u>4,532,093</u> | <u>-</u> |
| <u>Net Position</u> | | |
| Net investment in capital assets | <u>60,025,676</u> | <u>-</u> |
| Restricted for grants and contracts | 1,086,968 | - |
| Restricted for financial aid | 131,588 | - |
| Restricted for debt service | 593,398 | - |
| Restricted permanently for endowment fund investments | - | 4,872,232 |
| Restricted temporarily for scholarships and special assistance | <u>-</u> | <u>4,658,629</u> |
| Total restricted net position | <u>1,811,954</u> | <u>9,530,861</u> |
| Unrestricted | <u>(49,908,540)</u> | <u>2,225,121</u> |
| Total net position | <u>\$ 11,929,090</u> | <u>\$ 11,755,982</u> |

The accompanying notes are an integral part of this statement.

LINN-BENTON COMMUNITY COLLEGE

Statement of Revenues, Expenses and Changes in Net Position
Year Ended June 30, 2021

| | <u>College</u> | <u>Foundation (Component Unit)</u> year ended 12/31/20 |
|---|----------------------|---|
| Operating revenues: | | |
| Tuition and fees (net of scholarship discounts and allowances of \$5,657,205) | \$ 15,647,887 | \$ - |
| Student financial aid grants | 9,371,712 | - |
| Intergovernmental grants and contracts | 14,466,605 | - |
| Auxiliary enterprises: | | |
| Campus store sales | 739,406 | - |
| Food service sales | 1,175 | - |
| Printing services | 40,825 | - |
| Other operating revenue | <u>3,819,311</u> | <u>942,469</u> |
| Total operating revenues | <u>44,086,921</u> | <u>942,469</u> |
| Operating expenses: | | |
| Instruction | 37,258,529 | - |
| Instructional support | 7,503,457 | - |
| College support services | 11,702,694 | - |
| Student services | 8,191,991 | - |
| Community services | 192,400 | - |
| Scholarships and grants | 7,074,381 | - |
| Plant operations | 5,171,506 | - |
| Foundation programs | - | 1,133,190 |
| Depreciation | <u>3,945,828</u> | <u>-</u> |
| Total operating expenses | <u>81,040,786</u> | <u>1,133,190</u> |
| Operating loss | <u>(36,953,865)</u> | <u>(190,721)</u> |
| Nonoperating revenues-(expenses) | | |
| State community college support | 17,473,138 | - |
| Property taxes | 12,408,558 | - |
| Investment income | 195,614 | 1,085,011 |
| Interest expense | (2,387,199) | - |
| Debt issuance costs | (108,424) | - |
| Amortization of premium on bonds and full faith and credit obligations | 320,927 | - |
| Amortization of deferred loss on refunding | (6,693) | - |
| Loss on disposition of capital assets | <u>(2,391)</u> | <u>-</u> |
| Total nonoperating revenues-(expenses) | <u>27,893,530</u> | <u>1,085,011</u> |
| Income-(loss) before contributions | (9,060,335) | 894,290 |
| Capital contributions | <u>71,312</u> | <u>-</u> |
| Change in net position | (8,989,023) | 894,290 |
| Net position - beginning of year | <u>20,918,113</u> | <u>10,861,692</u> |
| Net position - end of year | <u>\$ 11,929,090</u> | <u>\$ 11,755,982</u> |

The accompanying notes are an integral part of this statement.

LINN-BENTON COMMUNITY COLLEGE

Statement of Cash Flows
Year Ended June 30, 2021

| | |
|---|----------------------|
| Cash flows from operating activities: | |
| Tuition and fees | \$ 15,461,188 |
| Student financial aid grants | 9,218,635 |
| Intergovernmental grants and contracts | 13,509,904 |
| Campus store receipts | 782,604 |
| Food service receipts | 3,278 |
| Printing services receipts | 39,264 |
| Other cash receipts | 3,967,888 |
| Payments to employees for services | (52,790,878) |
| Payments to suppliers for goods and services | (9,370,653) |
| Payments for student scholarships and grants | <u>(7,074,381)</u> |
| Net cash used in operating activities | <u>(26,253,151)</u> |
| Cash flows from noncapital financing activities: | |
| Cash received from State community college support | 17,473,138 |
| Cash received from property taxes | 9,269,095 |
| Principal paid on pension bonds | (1,795,000) |
| Interest paid on pension bonds | <u>(1,080,362)</u> |
| Net cash provided by noncapital financing activities | <u>23,866,871</u> |
| Cash flows from capital and related financing activities: | |
| Acquisition of capital assets | (5,863,856) |
| Cash received from capital contributions | 325,917 |
| Cash received from property taxes levied for capital debt | 3,176,505 |
| Proceeds from issuance of full faith and credit obligations | 7,055,000 |
| Premium on full faith and credit obligations | 1,007,084 |
| Debt issuance costs | (108,424) |
| Principal paid on capital-related long-term debt | (2,460,992) |
| Interest paid on capital-related long-term debt | <u>(1,306,670)</u> |
| Net cash provided by capital and related financing activities | <u>1,824,564</u> |
| Cash flows from investing activities: | |
| Investment income | <u>195,614</u> |
| Net decrease in cash and cash equivalents | (366,102) |
| Cash and cash equivalents - beginning of year | <u>19,859,822</u> |
| Cash and cash equivalents - end of year | <u>\$ 19,493,720</u> |

(Continues)

LINN-BENTON COMMUNITY COLLEGE

Statement of Cash Flows
Year Ended June 30, 2021

Reconciliation of operating loss to net cash
used in operating activities:

| | |
|--|-------------------------------|
| Operating loss | <u>\$ (36,953,865)</u> |
| Adjustments to reconcile operating loss to net cash used in operating activities: | |
| Depreciation | 3,945,828 |
| Decrease-(increase) in: | |
| Accounts/grants receivable | (1,511,117) |
| Loans receivable | (2,737) |
| Inventories | 105,424 |
| Prepaid expenses | 30,094 |
| Deferred outflows related to pensions | (3,225,552) |
| Increase-(decrease) in: | |
| Operating accounts payable | 503,744 |
| Payroll payable | (90,857) |
| Vacation payable | (25,546) |
| Termination benefits | (306,001) |
| Due to others | (207,587) |
| Unearned revenue | 409,694 |
| Net pension liability | 12,271,027 |
| Pension transition liability | (502,214) |
| Deferred inflows related to pensions | <u>(693,486)</u> |
| Total adjustments | <u>10,700,714</u> |
| Net cash used in operating activities | <u><u>\$ (26,253,151)</u></u> |

Noncash capital, investing and financing activities:

| | |
|--|--------------------|
| Accounts/grants receivable | \$ 289,605 |
| Capital contributions | (289,605) |
| Acquisition of capital assets | (35,000) |
| Capital contributions | 35,000 |
| Disposition of capital assets | 2,391 |
| Loss on disposition of capital assets | (2,391) |
| Deferred loss on refunding | 6,693 |
| Premium on bonds and full faith and credit obligations | (320,927) |
| Amortization of premium on bonds and full faith and credit obligations | 320,927 |
| Amortization of deferred loss on refunding | <u>(6,693)</u> |
| Total noncash capital, investing and financing activities | <u><u>\$ -</u></u> |

The accompanying notes are an integral part of this statement.

LINN-BENTON COMMUNITY COLLEGE

Notes to Financial Statements Year Ended June 30, 2021

1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES:

The financial statements of Linn-Benton Community College have been prepared in conformity with accounting principles generally accepted in the United States of America (GAAP) as prescribed by the Governmental Accounting Standards Board (GASB), including GASB Statement No. 34, *Basic Financial Statements – and Management’s Discussion and Analysis – for State and Local Governments*, and GASB Statement No. 35, *Basic Financial Statements – and Management’s Discussion and Analysis – for Public Colleges and Universities*, as amended by GASB Statement No. 63, *Financial Reporting of Deferred Outflows of Resources, Deferred Inflows of Resources, and Net Position*. The College follows the “business-type activities” reporting requirements of GASB Statements No. 34 and No. 35.

(A) Organization and Operation

Linn-Benton Community College (the College) was formed on December 6, 1966 under ORS Chapter 341. The College is governed by a seven member Board of Education whose members are elected independently.

(B) Description of the Reporting Entity

The financial statements of the College present the College and its component unit, Linn-Benton Community College Foundation. The Foundation is a discretely presented component unit and is reported in a separate column in the basic financial statements.

The Foundation is a legally separate, tax-exempt entity and acts primarily as a fund-raising organization to supplement the resources that are available to the College in support of its programs. The Board of Directors of the Foundation is self-perpetuating. Although the College does not control the timing or amount of receipts from the Foundation, the majority of resources, or income thereon, that the Foundation holds and invests, are restricted to the activities of the College by the donors. Because these restricted resources held by the Foundation can only be used by, or for the benefit of the College, the Foundation is considered a component unit of the College and is discretely presented in the College's financial statements.

The Foundation reports as a not-for-profit organization under Financial Accounting Standards Board (FASB) standards. As a result, certain revenue recognition criteria and presentation features are different from GASB revenue recognition and presentation features. No modifications have been made to the Foundation's financial information in the College's financial reporting entity for these differences.

During the year ended June 30, 2021, the Foundation provided scholarships of \$265,911 and other contributions of \$219,293 for the benefit of the College. The College provided personnel and administrative contributions to the Foundation totaling \$184,271 during the year. Complete financial statements for the Foundation can be obtained at: 6500 Pacific Boulevard SW, Albany, Oregon 97321.

1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES: (Contd)

(C) Basis of Accounting

The basic financial statements are reported using the economic resources measurement focus and accrual basis of accounting. Revenues are recorded when earned and expenses are recorded at the time liabilities are incurred, regardless of when the related cash flows take place. Property taxes are recognized as revenues in the years in which they are levied. Grants and other similar types of revenue are recognized as soon as all eligibility requirements imposed by the grantor have been met.

Operating revenues and expenses are distinguished from nonoperating items. Operating revenues and expenses generally result from providing services and producing and delivering goods in connection with the College's ongoing operations. The principal operating revenues of the College are charges to students for tuition and fees, grants and contracts for specific operating activities of the College, and campus store and food service sales. Operating expenses include the cost of faculty, administration and support expenses, campus store and food service operations, and depreciation on capital assets. All revenues and expenses not meeting this definition are reported as nonoperating revenues and expenses.

(D) Use of Estimates

The preparation of financial statements in accordance with generally accepted accounting principles requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

(E) Investments

Investments are carried at fair value. The College invests in the Oregon Local Government Investment Pool. This investment is authorized by Oregon Revised Statutes. For purposes of the statement of cash flows, cash, demand deposits, the Oregon Local Government Investment Pool and short-term investments purchased with original maturities of three months or less are considered to be cash and cash equivalents.

The College maintains depository insurance under Federal depository insurance funds and state and financial institution collateral pools for its cash deposits, except the Local Government Investment Pool, which is exempt from statutes requiring such insurance.

LINN-BENTON COMMUNITY COLLEGE

Notes to Financial Statements
Year Ended June 30, 2021

1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES: (Contd)

(F) Property Taxes Receivable

Ad valorem property taxes are levied on all taxable property as of July 1. Property taxes become an enforceable lien on that date for real property and for personal property. Collection dates are November 15, February 15 and May 15. Discounts are allowed if amounts due are received by November 15. Taxes unpaid and outstanding on May 16 are considered delinquent. Uncollected taxes, including delinquent amounts, are considered substantially collectible or recoverable through liens; therefore, no allowance for uncollectible taxes has been recorded. Property taxes are recognized as revenues when levied.

(G) Accounts/Grants Receivable and Loans Receivable

Unreimbursed grant expenditures due from grantor agencies are recorded in the financial statements as receivables and revenues. Cash received from grantor agencies in excess of related grant expenditures is recorded as unearned revenue.

Loans receivable consist primarily of tuition and fee installment plan loans made with College funds.

Accounts receivable and loans receivable are shown net of an allowance for uncollectible amounts.

(H) Inventories

Inventories, primarily books and supplies held for resale, are valued at the lower of cost (first-in/first-out method) or market.

(I) Capital Assets

Capital assets include land, buildings and improvements, equipment and vehicles, and library books with an estimated useful life greater than one year. The College's capitalization threshold is \$5,000 for all capital assets except library books. Library books are capitalized regardless of cost. Donated capital assets, donated works of art and similar items, and capital assets received in a service concession arrangement are reported at acquisition value. Major outlays for capital assets and improvements are capitalized as projects are constructed. The cost of normal maintenance and repairs that do not add value or functionality to the asset are not capitalized, but are expensed as incurred.

Capital assets are depreciated using the straight line method over the following estimated useful lives:

| <u>Assets</u> | <u>Years</u> |
|----------------------------|--------------|
| Buildings and improvements | 30 to 50 |
| Office equipment | 10 |
| Computer equipment | 5 |
| Vehicles | 10 |
| Library books | 10 |

1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES: (Contd)

(J) Deferred Outflows of Resources and Deferred Inflows of Resources

Deferred outflows of resources represent a consumption of net position that applies to a future period and will not be recognized as an outflow of resources (expense/expenditure) until then. Deferred inflows of resources represent an acquisition of net position that applies to a future period and will not be recognized as an inflow of resources (revenue) until that time.

(K) Deferred Loss on Refunding

The deferred loss on refunding is being amortized over the life of the 2017 Financing Agreement.

(L) Compensated Absences

Employees of the College are permitted to accumulate earned but unused vacation and sick pay. Vacation pay is recorded as a liability and an expense when earned. A liability does not exist for unpaid accumulated sick leave since College policy does not allow payment upon separation of service.

(M) Long-Term Debt

Premiums on bonds and full faith and credit obligations are deferred and amortized over the life of the debt using the straight-line method, which approximates the effective interest method.

(N) Pension Plan

For purposes of measuring the net pension liability, deferred outflows of resources and deferred inflows of resources related to pensions, and pension expense, information about the fiduciary net position of the Oregon Public Employees Retirement System (PERS) and additions to/deductions from PERS' fiduciary net position have been determined on the same basis as they are reported by PERS. For this purpose, benefit payments (including refunds of employee contributions) are recognized when due and payable in accordance with the benefit terms. Investments are reported at fair value.

(O) Termination Benefits

The College allows employees who have reached age and service requirements to request early retirement after age 55. The monthly benefit is computed using 1.25% of the employee's final annual compensation. The Board of Education has reserved the right to grant this benefit on a case by case basis. Additionally, for those employees granted the early retirement benefit, the College provides group medical, vision and dental insurance coverage for the employee. Early retirement costs are recognized as a liability and expense when the employees accept the offer.

1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES: (Contd)

(P) Scholarship Discounts and Allowances

Financial aid to students is reported in the basic financial statements under the alternative method as prescribed by the National Association of College and University Business Officers (NACUBO). Certain aid such as loans and funds provided to students as awarded by others is accounted for as a third party payment (credited to the student's account as if they student made the payment). All other aid is reflected in the basic financial statements as operating expenses, or scholarship discounts and allowances, which reduce revenues. The amount reported as operating expense represents the portion of aid that was provided to the student in the form of cash. Scholarship discounts and allowances represent the portion of aid provided to the student in the form of reduced tuition. Under the alternative method, these amounts are computed on a College basis by allocating the cash payments to students, excluding payments for services, on the ratio of total aid to the aid not considered to be third party aid.

(Q) Leases

Leases which meet certain criteria established by the Governmental Accounting Standards Board are classified as capital leases. Leases which do not meet criteria of a capital lease are classified as operating leases.

(R) Net Position

Net position reported in the Statement of Net Position is the difference between the College's total assets and deferred outflows and total liabilities and deferred inflows. Net position is subdivided into three categories: net investment in capital assets, restricted, and unrestricted.

Net investment in capital assets represents capital assets, less accumulated depreciation and outstanding principal and premiums of capital asset related debt, plus deferred loss on refunding of capital asset related debt and cash held for construction.

Restricted net position represents amounts for which constraints were imposed by creditors, grantors, contributors or laws or regulations. The College's policy is to first use restricted resources when an expense is incurred for which both restricted and unrestricted resources are available.

LINN-BENTON COMMUNITY COLLEGE

Notes to Financial Statements
Year Ended June 30, 2021

2 - CASH AND INVESTMENTS:

Cash and investments are comprised of the following at June 30, 2021:

| | |
|--------------------------------------|----------------------|
| Cash on hand | \$ 44,358 |
| Deposits with financial institutions | 5,132,082 |
| Investments | <u>14,317,280</u> |
| Total cash and investments | <u>\$ 19,493,720</u> |

Deposits with Financial Institutions

Deposits with financial institutions are bank demand deposits. The total bank balance, as shown on the banks' records at June 30, 2021, was \$6,843,953. Of these deposits, the total covered by federal depository insurance was \$250,000.

The Oregon State Treasurer is responsible for monitoring public funds held by bank depositories in excess of FDIC insured amounts, and for assuring that public funds on deposit are collateralized to the extent required by Oregon Revised Statutes (ORS) Chapter 295. ORS Chapter 295 requires depository banks to place and maintain on deposit with a third-party custodian bank securities having a value of 10%, 25%, or 110% of public funds on deposit depending primarily on the capitalization level of the depository bank.

Custodial credit risk for deposits is the risk that in the event of a bank failure, the government's deposits may not be returned to it. The College follows State law with respect to custodial credit risk and has not adopted a separate policy. Deposits in excess of FDIC insured amounts were exposed to custodial credit risk as of June 30, 2021, because these deposits were uncollateralized and/or were collateralized but not held by the third-party custodian bank in the College's name.

Investments

State statutes authorize the College to invest in general obligations of the U.S. Government and its agencies, certain bonded obligations of Oregon municipalities, bank repurchase agreements, bankers' acceptances, commercial paper and the Oregon Local Government Investment Pool, among others. The College has no investment policy that would further limit its investment choices.

At June 30, 2021, the College's investments consisted of:

| | |
|--|----------------------|
| Investment in Oregon Local Government Investment Pool | <u>\$ 14,317,280</u> |
|--|----------------------|

Notes to Financial Statements
Year Ended June 30, 2021

2 - CASH AND INVESTMENTS: (Contd)

Investments (Contd)

The Oregon Local Government Investment Pool is an open-ended, no-load diversified portfolio pool. Participants' account balances in the pool are determined by the amount of participants' deposits, adjusted for withdrawals and distributed interest. Interest is calculated and accrued daily on each participant's account based on the ending account balance and a variable interest rate determined periodically by the Oregon Short-Term Fund.

The Oregon Local Government Investment Pool is an external investment pool which is part of the Oregon Short-Term Fund. Investment policies are governed by the Oregon Revised Statutes and the Oregon Investment Council (Council). The State Treasurer is the investment officer for the Council. Investments are further governed by portfolio guidelines issued by the Oregon Short-Term Fund Board. The Oregon Short-Term Fund does not receive credit quality ratings from nationally recognized statistical rating organizations.

Interest rate risk is the risk that changes in interest rates will adversely affect the fair value of an investment. The Oregon Short-Term Fund manages this risk by limiting the maturity of the investments held by the fund. Weighted average maturities of investments in the Oregon Short-Term Fund at June 30, 2021 were: 58% mature within 93 days, 17% mature from 94 days to one year, and 25% mature from one to three years.

Restricted Cash and Investments

At June 30, 2021, the College had \$6,730,028 in unspent full faith and credit obligation proceeds. These unspent proceeds are restricted for capital improvements.

Foundation Cash and Investments

The Foundation's cash and investments of \$422,630 shown as current assets at December 31, 2020, consist of demand deposits and money market accounts.

The Foundation's investments of \$10,790,898 shown as noncurrent assets at December 31, 2020, primarily consist of equity mutual funds and real estate. Foundation investments are carried at fair value. Fair value and cost information for investments is as follows:

| | <u>Cost</u> | <u>Fair Value</u> |
|---------------------|---------------------|----------------------|
| Equity mutual funds | \$ 6,224,947 | \$ 8,119,408 |
| Real estate | <u>2,671,490</u> | <u>2,671,490</u> |
| | <u>\$ 8,896,437</u> | <u>\$ 10,790,898</u> |

LINN-BENTON COMMUNITY COLLEGE

Notes to Financial Statements
Year Ended June 30, 2021

2 - CASH AND INVESTMENTS: (Contd)

Foundation Cash and Investments (Contd)

The Foundation maintains a checking account at a financial institution insured by the Federal Deposit Insurance Corporation (FDIC) up to \$250,000 at December 31, 2020. Amounts at that financial institution were fully insured as of December 31, 2020.

The Foundation maintains its investments, other than real estate, with the investment firm Edward Jones. The Foundation's investments are diversified in a variety of mutual funds, certificates of deposit and equity securities. However, the Foundation's investments are subject to market fluctuations, which could dramatically affect the carrying value of these assets. The Foundation's investments are insured by the Securities Investors Protection Corporation (SIPC) up to a maximum of \$500,000. Investments at Edward Jones are also covered by additional insurance provided to investors through the company.

3 - CAPITAL ASSETS:

Capital assets activity for the year ended June 30, 2021 was as follows:

| | Balance July 1, 2020 | Increases | Decreases | Balance June 30, 2021 |
|---|-------------------------|----------------------|----------------------|--------------------------|
| Capital assets not being depreciated: | | | | |
| Land | \$ 9,003,965 | \$ 159,141 | \$ - | \$ 9,163,106 |
| Construction in process | 23,746,530 | 4,529,446 | 21,387,611 | 6,888,365 |
| Total capital assets not being depreciated | <u>32,750,495</u> | <u>4,688,587</u> | <u>21,387,611</u> | <u>16,051,471</u> |
| Capital assets being depreciated: | | | | |
| Buildings and improvements | 97,467,350 | 21,746,228 | - | 119,213,578 |
| Equipment and vehicles | 15,218,581 | 260,730 | 37,404 | 15,441,907 |
| Total capital assets being depreciated | <u>112,685,931</u> | <u>22,006,958</u> | <u>37,404</u> | <u>134,655,485</u> |
| Less accumulated depreciation for: | | | | |
| Buildings and improvements | 44,891,947 | 3,196,231 | - | 48,088,178 |
| Equipment and vehicles | 9,349,145 | 749,597 | 35,013 | 10,063,729 |
| Total accumulated depreciation | <u>54,241,092</u> | <u>3,945,828</u> | <u>35,013</u> | <u>58,151,907</u> |
| Total capital assets being depreciated, net | <u>58,444,839</u> | <u>18,061,130</u> | <u>2,391</u> | <u>76,503,578</u> |
| Total capital assets, net | <u>\$ 91,195,334</u> | <u>\$ 22,749,717</u> | <u>\$ 21,390,002</u> | <u>\$ 92,555,049</u> |

LINN-BENTON COMMUNITY COLLEGE

Notes to Financial Statements
Year Ended June 30, 2021

4 - LONG-TERM OBLIGATIONS:

Changes in long-term obligations for the year ended June 30, 2021 are as follows:

| | Balance July 1, 2020 | Additions | Deletions | Balance June 30, 2021 | Due within One Year | Interest Matured and Paid |
|---|-------------------------|---------------|--------------|--------------------------|------------------------|------------------------------|
| General obligation bonds payable | \$ 27,955,000 | \$ - | \$ 1,920,000 | \$ 26,035,000 | \$ 2,105,000 | \$ 1,150,350 |
| Premium on general obligation bonds payable | 2,893,891 | - | 291,821 | 2,602,070 | 291,821 | - |
| Pension bonds payable | 19,635,000 | - | 1,795,000 | 17,840,000 | 2,015,000 | 1,080,362 |
| Full faith and credit obligations payable | - | 7,055,000 | 150,000 | 6,905,000 | 405,000 | 80,544 |
| Premium on full faith and credit obligations payable | - | 1,007,084 | 29,106 | 977,978 | 69,856 | - |
| Financing agreement | 3,177,196 | - | 390,992 | 2,786,204 | 400,717 | 75,776 |
| Termination benefits | 1,499,742 | 365,899 | 671,900 | 1,193,741 | 502,745 | - |
| Pension transition liability | 3,188,882 | - | 502,214 | 2,686,668 | - | - |
| Net pension liability | 37,132,862 | 12,271,027 | - | 49,403,889 | - | - |
| Total | \$ 95,482,573 | \$ 20,699,010 | \$ 5,751,033 | \$ 110,430,550 | \$ 5,790,139 | \$ 2,387,032 |

Bonds Payable

In November 2014, a bond issue in the amount of \$34,000,000 was passed by the voters for the purpose of funding capital construction and improvements. The bonds were sold in February 2015 for \$38,450,270. The full faith and credit of the College is pledged for the Series 2015 General Obligation Bonds. Principal payments are due annually through June 2030 and interest is payable in December and June of each year with fixed rates ranging from 2% to 5%. Bonds maturing on or after June 1, 2026 are subject to redemption in whole or in part at 100% of the principal amount plus accrued interest to the redemption date.

In February 2004, the College issued \$29,235,000 of Limited Tax Pension Obligation Bonds and transferred the net proceeds to the State of Oregon Public Employees Retirement System to cover a portion of the College's share of the cost sharing plan's unfunded actuarial liability. Funds deposited are being used to pay a portion of the College's annual required contribution. Principal payments are due annually through June 30, 2028 and interest is payable in December and June of each year with fixed rates ranging from 5.44% to 5.53%. Under the terms of the Limited Tax Pension Obligation Bonds, a portion of the College's Community College Support Fund distribution from the State of Oregon is deposited directly with the bond trustee in an amount sufficient to meet scheduled principal and interest payments.

LINN-BENTON COMMUNITY COLLEGE

Notes to Financial Statements
Year Ended June 30, 2021

4 - LONG-TERM OBLIGATIONS: (Contd)

Bonds Payable (Contd)

Future bonded debt requirements for the Series 2015 bond issue are as follows:

| | <u>Principal</u> | <u>Interest</u> | <u>Total</u> |
|---------|----------------------|---------------------|----------------------|
| 2021-22 | \$ 2,105,000 | \$ 1,058,100 | \$ 3,163,100 |
| 2022-23 | 2,240,000 | 1,016,000 | 3,256,000 |
| 2023-24 | 2,430,000 | 926,400 | 3,356,400 |
| 2024-25 | 2,610,000 | 829,200 | 3,439,200 |
| 2025-26 | 2,805,000 | 753,450 | 3,558,450 |
| 2026-27 | 3,050,000 | 614,450 | 3,664,450 |
| 2027-28 | 3,315,000 | 461,950 | 3,776,950 |
| 2028-29 | 3,590,000 | 296,200 | 3,886,200 |
| 2029-30 | 3,890,000 | 116,700 | 4,006,700 |
| Total | <u>\$ 26,035,000</u> | <u>\$ 6,072,450</u> | <u>\$ 32,107,450</u> |

Future bonded debt requirements for the Series 2004 bond issue are as follows:

| | <u>Principal</u> | <u>Interest</u> | <u>Total</u> |
|---------|----------------------|---------------------|----------------------|
| 2021-22 | \$ 2,015,000 | \$ 982,713 | \$ 2,997,713 |
| 2022-23 | 2,250,000 | 873,098 | 3,123,098 |
| 2023-24 | 2,505,000 | 750,697 | 3,255,697 |
| 2024-25 | 2,785,000 | 612,171 | 3,397,171 |
| 2025-26 | 3,080,000 | 458,160 | 3,538,160 |
| 2026-27 | 3,400,000 | 287,836 | 3,687,836 |
| 2027-28 | 1,805,000 | 99,817 | 1,904,817 |
| Total | <u>\$ 17,840,000</u> | <u>\$ 4,064,492</u> | <u>\$ 21,904,492</u> |

The following is a schedule combining the 2015 and 2004 bond issues:

| | <u>Principal</u> | <u>Interest</u> | <u>Total</u> |
|---------|----------------------|----------------------|----------------------|
| 2021-22 | \$ 4,120,000 | \$ 2,040,813 | \$ 6,160,813 |
| 2022-23 | 4,490,000 | 1,889,098 | 6,379,098 |
| 2023-24 | 4,935,000 | 1,677,097 | 6,612,097 |
| 2024-25 | 5,395,000 | 1,441,371 | 6,836,371 |
| 2025-26 | 5,885,000 | 1,211,610 | 7,096,610 |
| 2026-27 | 6,450,000 | 902,286 | 7,352,286 |
| 2027-28 | 5,120,000 | 561,767 | 5,681,767 |
| 2028-29 | 3,590,000 | 296,200 | 3,886,200 |
| 2029-30 | 3,890,000 | 116,700 | 4,006,700 |
| | <u>\$ 43,875,000</u> | <u>\$ 10,136,942</u> | <u>\$ 54,011,942</u> |

LINN-BENTON COMMUNITY COLLEGE

Notes to Financial Statements
Year Ended June 30, 2021

4 - LONG-TERM OBLIGATIONS: (Contd)

Full Faith and Credit Obligations Payable

In January 2021, the College issued \$7,055,000 in full faith and credit obligations which, along with \$1,007,084 in premium, will be used to finance capital construction and improvements. The full faith and credit of the College is pledged for the Series 2021 Full Faith and Credit Obligations. Principal payments are due annually through June 2035 and interest is payable in December and June of each year at a fixed rate of 3%. Obligations maturing on or after June 15, 2032 are subject to redemption in whole or in part at 100% of the principal amount plus accrued interest to the redemption date.

Future debt requirements for the Series 2021 obligations are as follows:

| | <u>Principal</u> | <u>Interest</u> | <u>Total</u> |
|---------|---------------------|---------------------|---------------------|
| 2021-22 | \$ 405,000 | \$ 207,150 | \$ 612,150 |
| 2022-23 | 415,000 | 195,000 | 610,000 |
| 2023-24 | 430,000 | 182,550 | 612,550 |
| 2024-25 | 440,000 | 169,650 | 609,650 |
| 2025-26 | 455,000 | 156,450 | 611,450 |
| 2026-27 | 470,000 | 142,800 | 612,800 |
| 2027-28 | 485,000 | 128,700 | 613,700 |
| 2028-29 | 495,000 | 114,150 | 609,150 |
| 2029-30 | 510,000 | 99,300 | 609,300 |
| 2030-31 | 525,000 | 84,000 | 609,000 |
| 2031-32 | 545,000 | 68,250 | 613,250 |
| 2032-33 | 560,000 | 51,900 | 611,900 |
| 2033-34 | 575,000 | 35,100 | 610,100 |
| 2034-35 | 595,000 | 17,850 | 612,850 |
| | <u>\$ 6,905,000</u> | <u>\$ 1,652,850</u> | <u>\$ 8,557,850</u> |

LINN-BENTON COMMUNITY COLLEGE

Notes to Financial Statements
Year Ended June 30, 2021

4 - LONG-TERM OBLIGATIONS: (Contd)

Financing Agreement

In February 2017, the College issued a full faith and credit refunding financing agreement with a private bank totaling \$4,172,008, the proceeds of which were used to advance refund \$1,880,000 of Series 2007 Full Faith and Credit Obligations and \$2,085,000 of Series 2008 Full Faith and Credit Obligations through an in-substance defeasance and to pay issuance costs. This constituted all remaining Series 2007 Obligations and all but \$165,000 of the remaining Series 2008 Obligations. The remaining Series 2008 Obligations were paid by the College during 2017-18 along with interest of \$8,250. The College advance refunded these obligations to reduce its total debt service payments over the life of the Series 2017 Financing Agreement by \$247,406 and to obtain an economic gain (difference between the present values of the debt service payments on the old and new debt) of \$218,185. All defeased Series 2007 and Series 2008 Obligations were redeemed on June 1, 2018. The full faith and credit of the College is pledged for the financing agreement. Principal payments on the Series 2017 Financing Agreement are due annually beginning in June 2017 through June 1, 2027 and interest is payable in December and June of each year at a fixed rate of 2.39%. Obligations under the financing agreement maturing on or after June 1, 2020 are subject to redemption in whole or in part at 100% of the principal amount plus accrued interest to the redemption date.

Future requirements for the Series 2017 Financing Agreement are as follows:

| | <u>Principal</u> | <u>Interest</u> | <u>Total</u> |
|---------|---------------------|-------------------|---------------------|
| 2021-22 | \$ 400,717 | \$ 66,451 | \$ 467,168 |
| 2022-23 | 410,074 | 56,894 | 466,968 |
| 2023-24 | 419,054 | 47,114 | 466,168 |
| 2024-25 | 427,649 | 37,119 | 464,768 |
| 2025-26 | 440,848 | 26,920 | 467,768 |
| 2026-27 | 448,562 | 16,406 | 464,968 |
| 2027-28 | 239,300 | 5,707 | 245,007 |
| Total | <u>\$ 2,786,204</u> | <u>\$ 256,611</u> | <u>\$ 3,042,815</u> |

Termination Benefits

The early retirement benefit is reported as a liability on the College's financial statements and is recognized as a voluntary termination benefit as classified under GASB Statement No. 47. The liability reflects the discounted present value of expected future stipend payments and group medical, vision and dental insurance coverage premiums. The discount rate used was 3%, which approximates the College's historical yield on current investments held in the Local Government Investment Pool.

5 - PENSION PLANS:

Plan Description

The College contributes to two pension plans administered by the Oregon Public Employees Retirement System (PERS). The Oregon Public Employees Retirement Fund (OPERF) applies to the College's contribution for qualifying employees who were hired before August 29, 2003, and is a cost-sharing multiple-employer defined benefit pension plan. The Oregon Public Service Retirement Plan (OPSRP) is a hybrid successor plan to the OPERF and consists of two programs: 1) The Pension Program, the defined benefit portion of the plan which applies to qualifying College employees hired on or after August 29, 2003. Benefits are calculated by a formula for members who attain normal retirement age. The formula takes into account final average salary and years of service. 2) The Individual Account Program (IAP), the defined contribution portion of the plan. Beginning January 1, 2004, all PERS member contributions go into the IAP. PERS members retain their existing PERS accounts, but any future member contributions are deposited into the member's IAP, not the member's PERS account.

Both PERS plans provide retirement and disability benefits, postemployment healthcare benefits, annual cost-of-living adjustments, and death benefits to plan members and beneficiaries. PERS is administered under Oregon Revised Statute Chapter 238, which establishes the Public Employees Retirement Board as the governing body of PERS. PERS issues a publicly available financial report that includes financial statements and required supplementary information. The report may be obtained at:

<https://www.oregon.gov/pers/Pages/Financials/Actuarial-Financial-Information.aspx>.

Benefits provided

A. Tier One/Tier Two Retirement Benefit ORS Chapter 238

Pension Benefits

The PERS retirement allowance is payable monthly for life. It may be selected from 13 retirement benefit options. These options include survivorship benefits and lump-sum refunds. The basic benefit is based on years of service and final average salary. A percentage (1.67 percent for general service employees) is multiplied by the number of years of service and the final average salary. Benefits may also be calculated under either a formula plus annuity (for members who were contributing before August 21, 1981) or a money match computation if a greater benefit results.

A member is considered vested and will be eligible at minimum retirement age for a service retirement allowance if he or she has had a contribution in each of five calendar years or has reached at least 50 years of age before ceasing employment with a participating employer. General service employees may retire after reaching age 55. Tier One general service employee benefits are reduced if retirement occurs prior to age 58 with fewer than 30 years of service. Tier Two members are eligible for full benefits at age 60. The ORS Chapter 238 Defined Benefit Pension Plan is closed to new members hired on or after August 29, 2003.

5 - PENSION PLANS: (Contd)

Death Benefits

Upon the death of a non-retired member, the beneficiary receives a lump-sum refund of the member's account balance (accumulated contributions and interest). In addition, the beneficiary will receive a lump-sum payment from employer funds equal to the account balance, provided one or more of the following conditions are met:

- the member was employed by a PERS employer at the time of death,
- the member died within 120 days after termination of PERS-covered employment,
- the member died as a result of injury sustained while employed in a PERS-covered job, or
- the member was on an official leave of absence from a PERS-covered job at the time of death.

Disability Benefits

A member with 10 or more years of creditable service who becomes disabled from other than duty-connected causes may receive a non-duty disability benefit. A disability resulting from a job-incurred injury or illness qualifies a member for disability benefits regardless of the length of PERS-covered service. Upon qualifying for either a non-duty or duty disability, service time is computed to age 58 when determining the monthly benefit.

Benefit Changes After Retirement

Members may choose to continue participation in a variable equities investment account after retiring and may experience annual benefit fluctuations due to changes in the market value of equity investments.

Under ORS 238.360 monthly benefits are adjusted annually through cost-of-living changes (COLA). The COLA is capped at 2.0 percent.

B. OPSRP Pension Program (OPSRP DB)

Pension Benefits

The Pension Program (ORS Chapter 238A) provides benefits to members hired on or after August 29, 2003. This portion of OPSRP provides a life pension funded by employer contributions. Benefits are calculated with the following formula for members who attain normal retirement age:

General service: 1.5 percent is multiplied by the number of years of service and the final average salary. Normal retirement age for general service members is age 65, or age 58 with 30 years of retirement credit.

5 - PENSION PLANS: (Contd)

Pension Benefits (Contd)

A member of the OPSRP Pension Program becomes vested on the earliest of the following dates: the date the member completes 600 hours of service in each of five calendar years, the date the member reaches normal retirement age, and, if the pension program is terminated, the date on which termination becomes effective.

Death Benefits

Upon the death of a non-retired member, the spouse or other person who is constitutionally required to be treated in the same manner as the spouse, receives for life 50 percent of the pension that would otherwise have been paid to the deceased member.

Disability Benefits

A member who has accrued 10 or more years of retirement credits before the member becomes disabled or a member who becomes disabled due to job-related injury shall receive a disability benefit of 45 percent of the member's salary determined as of the last full month of employment before the disability occurred.

Benefit Changes After Retirement

Under ORS 238A.210 monthly benefits are adjusted annually through cost-of-living changes (COLA). The COLA is capped at 2.0 percent.

C. OPSRP Individual Account Program (OPSRP IAP)

Pension Benefits

An IAP member becomes vested on the date the employee account is established or on the date the rollover account was established. If the employer makes optional employer contributions for a member, the member becomes vested on the earliest of the following dates: the date the member completes 600 hours of service in each of five calendar years, the date the member reaches normal retirement age, the date the IAP is terminated, the date the active member becomes disabled, or the date the active member dies.

Upon retirement, a member of the OPSRP Individual Account Program (IAP) may receive the amounts in his or her employee account, rollover account, and vested employer account as a lump-sum payment or in equal installments over a 5-, 10-, 15-, 20-year period or an anticipated life span option. Each distribution option has a \$200 minimum distribution limit.

5 - PENSION PLANS: (Contd)

Death Benefits

Upon the death of a non-retired member, the beneficiary receives in a lump sum the member's account balance, rollover account balance, and vested employer optional contribution account balance. If a retired member dies before the installment payments are completed, the beneficiary may receive the remaining installment payments or choose a lump-sum payment.

Recordkeeping

PERS contracts with VOYA Financial to maintain IAP participant records.

Contributions

PERS funding policy provides for monthly employer contributions at actuarially determined rates. These contributions, expressed as a percentage of covered payroll, are intended to accumulate sufficient assets to pay benefits when due. This funding policy applies to the PERS Defined Benefit Plan and the Other Postemployment Benefit Plans. Employer contribution rates during the period were based on the December 31, 2017 actuarial valuation. The rates based on a percentage of payroll, first became effective July 1, 2019. Employer contributions for the year ended June 30, 2021 were \$3,478,584, excluding amounts to fund employer specific liabilities. The rates in effect for the fiscal year ended June 30, 2021 were 17.17 percent for Tier One/Tier Two General Service Members and 11.14 percent for OPSRP Pension Program General Service Members, net of 10.78 percent of side account rate relief. An additional 6 percent contribution is required for the OPSRP Individual Account Program.

Pension Liabilities, Pension Expenses, and Deferred Outflows of Resources and Deferred Inflows of Resources related to Pensions

At June 30, 2021, the College reported a liability of \$49,403,889 for its proportionate share of the net pension liability. The net pension liability was measured as of June 30, 2020 and the total pension liability used to calculate the net pension liability was determined by an actuarial valuation as of December 31, 2018 rolled forward to June 30, 2020. The College's proportion of the net pension liability was based on a projection of the College's long-term share of contributions to the pension plan relative to the projected contributions of all participating entities actuarially determined. PERS has established side accounts for employers that made lump sum payments to the plan in excess of their actuarially required contributions. Since different contribution rates are assessed to employers based on the value of the side accounts, the side account values were reflected separately in the proportionate share calculation. On June 30, 2020, the College's proportion was 0.25393334%.

LINN-BENTON COMMUNITY COLLEGE

Notes to Financial Statements
Year Ended June 30, 2021

5 - PENSION PLANS: (Contd)

Pension Liabilities, Pension Expenses, and Deferred Outflows of Resources and Deferred Inflows of Resources related to Pensions (Contd)

For the year ended June 30, 2021, the College recognized pension expense of approximately \$11.8 million. At June 30, 2021, the College reported deferred outflows of resources and deferred inflows of resources related to pensions from the following sources:

| | <u>Deferred Outflows of Resources</u> | <u>Deferred Inflows of Resources</u> |
|---|---|--|
| Differences between expected and actual experience | \$ 2,439,016 | \$ - |
| Changes in assumptions | 2,974,054 | 104,205 |
| Net difference between projected and actual earnings on investments | 6,516,318 | - |
| Changes in proportionate share | 1,114,234 | 401,377 |
| Changes in proportion and differences between employer contributions and proportionate share of contributions | - | 4,026,511 |
| College's contributions subsequent to the measurement date | <u>3,478,584</u> | <u>-</u> |
| Deferred outflows/inflows at June 30, 2021 | <u>\$ 16,522,206</u> | <u>\$ 4,532,093</u> |

Contributions subsequent to the measurement date of \$3,478,584 reported as deferred outflows of resources will be recognized as a reduction of the net pension liability in the year ended June 30, 2022. Other deferred outflows of resources totaling \$13,043,622 less deferred inflows of resources of \$4,532,093 related to pensions will be recognized in pension expense as follows:

| <u>Year Ending June 30,</u> | <u>Amount</u> |
|-----------------------------|---------------------|
| 2022 | \$ 1,472,595 |
| 2023 | 2,703,820 |
| 2024 | 2,649,713 |
| 2025 | 1,781,803 |
| 2026 | <u>(96,402)</u> |
| Total | <u>\$ 8,511,529</u> |

Notes to Financial Statements
Year Ended June 30, 2021

5 - PENSION PLANS: (Contd)

Actuarial assumptions

The employer contribution rates effective July 1, 2019, through June 30, 2021, were set using the entry age normal actuarial cost method. For the Tier One/Tier Two component of the PERS Defined Benefit Plan, this method produced an employer contribution rate consisting of (1) an amount for normal cost (the estimated amount necessary to finance benefits earned by the employees during the current service year), (2) an amount for the amortization of unfunded actuarial accrued liabilities, which are being amortized over a fixed period with new unfunded actuarial accrued liabilities being amortized over 20 years. For the OPSRP Pension Program component of the PERS Defined Benefit Plan, this method produced an employer contribution rate consisting of (a) an amount for normal cost (the estimated amount necessary to finance benefits earned by the employees during the current service year), (b) an amount for the amortization of unfunded actuarial accrued liabilities, which are being amortized over a fixed period with new unfunded actuarial accrued liabilities being amortized over 16 years. The total pension liability in the December 31, 2018 actuarial valuation was determined using the following actuarial assumptions:

| | |
|-----------------------------------|--|
| Valuation Date | December 31, 2018 rolled forward to June 30, 2020 |
| Experience Study Report | 2018, published July 24, 2019 |
| Actuarial Cost Method | Entry Age Normal |
| Amortization Method | Amortized as a level percentage of payroll as layered amortization bases over a closed period; Tier One/Tier Two UAL is amortized over 20 years and OPSRP pension UAL is amortized over 16 years. |
| Asset Valuation Method | Fair value of assets |
| Actuarial Assumptions: | |
| Inflation Rate | 2.50 percent |
| Investment Rate of Return | 7.20 percent |
| Discount Rate | 7.20 percent |
| Projected Salary Increases | 3.50 percent overall payroll growth |
| Cost of Living Adjustments (COLA) | Blend of 2.00% COLA and graded COLA (1.25%/0.15%) in accordance with <i>Moro</i> decision; blend based on service. |
| Mortality | <p>Healthy retirees and beneficiaries: Pub-2010 Healthy Retiree, sex distinct, generational with Unisex, Social Security Data Scale, with job category adjustments and set-backs as described in the valuation.</p> <p>Active members: Pub-2010 Employee, sex distinct, generational with Unisex, Social Security Data Scale, with job category adjustments and set-backs as described in the valuation.</p> <p>Disabled retirees: Pub-2010 Disabled Retiree, sex distinct, generational with Unisex, Social Security Data Scale, with job category adjustments and set-backs as described in the valuation.</p> |

Actuarial valuations of an ongoing plan involve estimates of the value of projected benefits and assumptions about the probability of events far into the future. Actuarially determined amounts are subject to continual revision as actual results are compared to past expectations and new estimates are made about the future. Experience studies are performed as of December 31 of even numbered years. The methods and assumptions shown above are based on the 2018 Experience Study which reviewed experience for the four-year period ending on December 31, 2018.

LINN-BENTON COMMUNITY COLLEGE

Notes to Financial Statements
Year Ended June 30, 2021

5 - PENSION PLANS: (Contd)

Long-term expected rate of return

To develop an analytical basis for the selection of the long-term expected rate of return assumption, the PERS Board reviewed long-term assumptions developed by both Milliman's capital market assumptions team and the Oregon Investment Council's (OIC) investment advisors. The table below shows Milliman's assumptions for each of the asset classes in which the plan was invested at that time based on the OIC long-term target asset allocation. The OIC's description of each asset class was used to map the target allocation to the asset classes shown below. Each asset class assumption is based on a consistent set of underlying assumptions, and includes adjustment for the inflation assumption. These assumptions are not based on historical returns, but instead are based on a forward-looking capital market economic model.

| Asset Class | Target Allocation | Compounded Annual Return (Geometric) |
|-----------------------------------|-------------------|--|
| Core Fixed Income | 9.60% | 4.07% |
| Short-Term Bonds | 9.60% | 3.68% |
| Bank/Leveraged Loans | 3.60% | 5.19% |
| High Yield Bonds | 1.20% | 5.74% |
| Large/Mid Cap US Equities | 16.17% | 6.30% |
| Small Cap US Equities | 1.35% | 6.68% |
| Micro Cap US Equities | 1.35% | 6.79% |
| Developed Foreign Equities | 13.48% | 6.91% |
| Emerging Market Equities | 4.24% | 7.69% |
| Non-US Small Cap Equities | 1.93% | 7.25% |
| Private Equities | 17.50% | 8.33% |
| Real Estate (Property) | 10.00% | 5.55% |
| Real Estate (REITS) | 2.50% | 6.69% |
| Hedge Fund of Funds - Diversified | 1.50% | 4.06% |
| Hedge Fund - Event-driven | 0.38% | 5.59% |
| Timber | 1.13% | 5.61% |
| Farmland | 1.13% | 6.12% |
| Infrastructure | 2.25% | 6.67% |
| Commodities | 1.13% | 3.79% |
| Total | 100.00% | |
| Assumed Inflation - Mean | | 2.50% |

Notes to Financial Statements
Year Ended June 30, 2021

5 - PENSION PLANS: (Contd)

Discount rate

The discount rate used to measure the total pension liability was 7.20 percent for the Defined Benefit Pension Plan. The projection of cash flows used to determine the discount rate assumed that contributions from plan members and those of the contributing employers are made at the contractually required rates, as actuarially determined. Based on those assumptions, the pension plan's fiduciary net position was projected to be available to make all projected future benefit payments of current plan members. Therefore, the long-term expected rate of return on pension plan investments for the Defined Benefit Pension Plan was applied to all periods of projected benefit payments to determine the total pension liability.

Sensitivity of the College's proportionate share of the net pension liability to changes in the discount rate

The following presents the College's proportionate share of the net pension liability calculated using the discount rate of 7.20%, as well as what the College's proportionate share of the net pension liability would be if it were calculated using a discount rate that is 1-percentage-point lower (6.20%) or 1-percentage-point higher (8.20%) than the current rate:

| | <u>1% Decrease (6.20%)</u> | <u>Discount Rate (7.20%)</u> | <u>1% Increase (8.20%)</u> |
|--|----------------------------|------------------------------|----------------------------|
| College's proportionate share of the net pension liability | \$ 76,276,538 | \$ 49,403,889 | \$ 26,869,997 |

Changes of plan provisions

Senate Bill 1049, signed into law in June 2019, introduced a limit on the amount of annual salary included for the calculation of benefits. Beginning in 2020, annual salary in excess of \$195,000 (as indexed for inflation in future years) will be excluded when determining member benefits. Additionally, effective July 1, 2020, a portion of the 6% of salary member contribution to the Individual Account Program will be redirected to Employee Pension Stability Accounts, which will help fund the defined benefits provided under Tier One/Tier Two and OPSRP. For Tier One/Tier Two members, the prospectively redirected amount will be 2.50% of salary, and for OPSRP members the amount will be 0.75% of salary. The redirection will only apply to members earning \$2,500 per month or more (indexed for inflation).

Pension plan fiduciary net position

Detailed information about the pension plan's fiduciary net position is available in the separately issued PERS financial report.

Notes to Financial Statements
Year Ended June 30, 2021

5 - PENSION PLANS: (Contd)

Transition Liability

The College reports a separate liability to the plan with a balance of \$2,686,668 at June 30, 2021. The liability represents the College's allocated share of the pre-SLGRP pooled liability. The College is being assessed an employer contribution rate of 1.71 percent of covered payroll for payment of this transition liability.

6 - RISK MANAGEMENT:

The College is exposed to various risks of loss related to torts; theft of, damage to, and destruction of assets; errors and omissions; injuries to employees; and natural disasters. The College is a member of the Oregon School Boards Association PACE Program and pays an annual premium to PACE for its general and automobile liability and automobile physical damage coverage. Under the membership agreement with PACE, the insurance pool is to be self-sustaining through member premiums and will reinsure through commercial companies for claims in excess of certain limits.

The College carries commercial insurance for other risks of loss including property damage, boiler and machinery, workers' compensation, public official bond and employee dishonesty coverage. Settled claims resulting from these risks have not exceeded commercial insurance coverage in any of the past three years.

7 - CONTINGENCIES:

Grants receivable and grant receipts are subject to adjustment by grantor agencies, principally the Federal Government. Any disallowed claims, including claims already collected, could become a liability to the College.

8 - BUDGET:

The College budgets all College funds required to be budgeted in accordance with the Oregon Local Budget Law on a Non GAAP budgetary basis. The College follows these procedures in establishing its budget:

1. In the spring of each year, the President of the College submits a proposed budget to the budget committee which consists of the Board of Education and an equal number of concerned citizens of the community. Estimated receipts and expenditures are budgeted by fund, department and major category.
2. The budget committee conducts public hearings for the purpose of obtaining taxpayer comments.
3. The budget committee proposes a budget to the Board of Education. The estimated expenditures for each fund may not be increased by more than 10 percent by the Board, and ad valorem taxes for all funds may not exceed the amount shown in the budget document unless the Board republishes the budget and holds additional public hearings.

Notes to Financial Statements
Year Ended June 30, 2021

8 - BUDGET: (Contd)

4. The Board legally adopts the budget before July 1 through a Board resolution. The resolution authorizing appropriations for each fund sets the level by which expenditures cannot legally exceed appropriations. The level of control established by the resolution for each fund is at the sub-object level (i.e., Personal Services, Materials and Services, Capital Outlay, Debt Service, and Operating Contingency). Appropriations lapse at year end.
5. The Board may change the budget throughout the year by appropriation transfers between levels of control and supplemental budgets as authorized by Oregon Revised Statutes. During the fiscal year ended June 30, 2021, the Board approved transfer resolutions and appropriated grant funds as allowed by state law.
6. Encumbrances represent commitments related to unperformed contracts for goods or services. All encumbrances lapse at the end of each fiscal year. Any outstanding purchase orders at June 30 are re-encumbered in the subsequent year.

During 2020-21, the College overexpended the transfers out appropriation in the Auxiliary Fund by \$525,574 and the transfers out appropriation in the Capital Projects Fund by \$136,606.

REQUIRED SUPPLEMENTARY INFORMATION

LINN-BENTON COMMUNITY COLLEGE

Schedule of the Proportionate Share of the Net Pension Liability
Oregon Public Employees Retirement System Pension Plan
For the last eight fiscal years

| Fiscal Year Ended June 30 | (a) College's proportion of the net pension liability (asset) | (b) College's proportionate share of the net pension liability (asset) | (c) College's covered payroll | (b/c) College's proportionate share of the net pension liability (asset) as a percentage of its covered payroll | Plan fiduciary net position as a percentage of the total pension liability |
|---------------------------|--|---|----------------------------------|--|--|
| 2021 | 0.2539% | \$ 49,403,889 | \$ 28,836,402 | 171.32% | 75.79% |
| 2020 | 0.2543% | 37,132,862 | 28,646,312 | 129.63% | 80.23% |
| 2019 | 0.2466% | 28,453,976 | 27,933,588 | 101.86% | 82.07% |
| 2018 | 0.2431% | 23,451,821 | 26,580,474 | 88.23% | 83.12% |
| 2017 | 0.2498% | 29,694,933 | 25,574,924 | 116.11% | 80.53% |
| 2016 | 0.2602% | 6,811,500 | 24,818,945 | 27.44% | 91.88% |
| 2015 | 0.2902% | (16,109,823) | 24,162,714 | -66.67% | 103.60% |
| 2014 | 0.2902% | 5,843,993 | 24,162,714 | 24.19% | 91.97% |

The amounts presented for each fiscal year were actuarially determined as of December 31 and rolled forward to the measurement date which is a date one year earlier than the fiscal year-end date above.

This schedule is presented to illustrate the requirements to show information for ten years. However, until a full ten-year trend has been compiled, information is presented only for the years for which the required supplementary information is available.

LINN-BENTON COMMUNITY COLLEGE

Schedule of Contributions
Oregon Public Employees Retirement System Pension Plan
For the last eight fiscal years

| Fiscal Year Ended June 30 | (a) Statutorily required contribution | (b) Contributions in relation to the statutorily required contribution | (a-b) Contribution deficiency (excess) | (c) College's covered payroll | (b/c) Contributions as a percent of covered payroll |
|---------------------------|--|---|---|----------------------------------|--|
| 2021 | \$ 3,478,584 | \$ 3,478,584 | \$ - | \$ 29,594,017 | 11.75% |
| 2020 | 3,404,097 | 3,404,097 | - | 28,836,402 | 11.80% |
| 2019 | 2,341,747 | 2,341,747 | - | 28,646,312 | 8.17% |
| 2018 | 2,279,127 | 2,279,127 | - | 27,933,588 | 8.16% |
| 2017 | 1,598,024 | 1,598,024 | - | 26,580,474 | 6.01% |
| 2016 | 1,649,128 | 1,649,128 | - | 25,574,924 | 6.45% |
| 2015 | 1,605,997 | 1,605,997 | - | 24,818,945 | 6.47% |
| 2014 | 1,622,115 | 1,622,115 | - | 24,162,714 | 6.71% |

The amounts presented for each fiscal year were actuarially determined as of December 31 and rolled forward to the measurement date which is a date one year earlier than the fiscal year-end date above. However, the contributions above represent contributions made during the respective fiscal year indicated above.

This schedule is presented to illustrate the requirements to show information for ten years. However, until a full ten-year trend has been compiled, information is presented only for the years for which the required supplementary information is available.

LINN-BENTON COMMUNITY COLLEGE

Notes to Required Supplementary Information
Oregon Public Employees Retirement System Pension Plan

Changes in Plan Provisions

Key changes in plan provisions effective for the June 30, 2015 measurement date are described in the Oregon Public Employees Retirement System's GASB 68 Disclosure Information which was published on September 18, 2013 and can be found at:

<https://www.oregon.gov/pers/EMP/Documents/GASB/2014/GASB-Disclosure-Information.pdf>

and in a letter from the plan's actuary dated May 23, 2016 which can be found at:

<https://www.oregon.gov/pers/EMP/Documents/GASB/2015/Letter-From-Actuary-5-23-16.pdf>

Key changes in plan provisions effective for the June 30, 2020 measurement date are as follows:

Senate Bill 1049, signed into law in June 2019, introduced a limit on the amount of annual salary included for the calculation of benefits. Beginning in 2020, annual salary in excess of \$195,000 (as indexed for inflation in future years) will be excluded when determining member benefits. Additionally, effective, July 1, 2020, a portion of the 6% of salary member contribution to the Individual Account Program will be redirected to Employee Pension Stability Accounts, which will help fund the defined benefits provided under Tier One/Tier Two and OPSRP. For Tier One/Tier Two members, the prospectively redirected amount will be 2.50% of salary, and for OPSRP members the amount will be 0.75% of salary. The redirection will only apply to members earning \$2,500 per month or more (indexed for inflation).

Changes in assumptions

Key changes in assumptions for the December 31, 2012 and 2013 valuations are described in the Oregon Public Employees Retirement System's 2012 Experience Study (Updated) which was published on September 18, 2013 and can be found at:

<https://www.oregon.gov/PERS/Documents/Financials/Actuarial/2013/Experience-Study-Updated.pdf>

Key changes in assumptions for the December 31, 2014 and 2015 valuations are described in the Oregon Public Employees Retirement System's 2014 Experience Study which was published on September 23, 2015 and can be found at: <https://www.oregon.gov/PERS/Documents/Financials/Actuarial/2015/Experience-Study.pdf>

Key changes in assumptions for the December 31, 2016 and 2017 valuations are the reduction of the discount rate and the assumed investment rate of return from 7.5% to 7.2%.

OTHER SUPPLEMENTARY INFORMATION

OTHER SUPPLEMENTARY INFORMATION
Description of Budgeted College Funds

Other supplementary information consists of schedules required by the Minimum Standards for Audits of Oregon Municipal Corporations, prescribed by the Oregon Secretary of State. Statements of Revenues, Expenditures and Changes in Fund Balance – Budget and Actual are presented on a Non GAAP budgetary basis for each College fund required to be budgeted in accordance with the Oregon Local Budget Law.

Budgeted College funds are as follows:

General Fund - Accounts for all resources traditionally associated with operating the College which are not required legally or by sound financial management to be accounted for in another fund.

Special Projects Fund - Accounts for projects funded from federal, state, and local grant funds.

Auxiliary Fund - Accounts for projects funded by restricted revenues generated from state grant funds, contracted training, special divisional projects, student activities and proceeds from the sale of excess property.

Financial Aid Fund - Accounts for federal, state, and local student loan and grant programs associated with student financial aid.

Capital Projects Fund - Accounts for activities relating to major construction projects including acquisition of real property, construction of new facilities and major renovations of existing facilities. Resources are primarily provided from the issuance of debt.

Debt Service Fund - Accounts for the funds collected to pay the debt service requirements on bonds and full faith and credit obligations.

Enterprise Fund - Accounted for the operation of the College's campus store, food service, printing and entrepreneur departments. All of these departments were transferred to the Auxiliary Fund during 2020-21.

ASLBCC, Clubs and Workforce Agency Fund - Accounts for the activities of the student government, clubs and workforce programs.

LINN-BENTON COMMUNITY COLLEGE

Schedule of Revenues, Expenditures and Changes in
Fund Balance - Budget and Actual
GENERAL FUND
Year Ended June 30, 2021

| | Budgeted Amounts | | Actual Amounts | Variance With Final Budget Positive (Negative) |
|--|--------------------|--------------------|---------------------|---|
| | Original | Final | | |
| Revenues: | | | | |
| Property taxes | \$ 9,585,718 | \$ 9,585,718 | \$ 9,264,057 | \$ (321,661) |
| Tuition and fees | 21,115,863 | 21,115,863 | 19,080,698 | (2,035,165) |
| Other local | 214,000 | 214,000 | 905,834 | 691,834 |
| Intergovernmental - state and federal | 20,180,474 | 20,180,474 | 26,373,468 | 6,192,994 |
| Interest | 339,020 | 339,020 | 118,869 | (220,151) |
| Other | 50,000 | 50,000 | 55,921 | 5,921 |
| Total revenues | <u>51,485,075</u> | <u>51,485,075</u> | <u>55,798,847</u> | <u>4,313,772</u> |
| Expenditures: | | | | |
| Personal services | 48,796,342 | 48,876,870 | 45,883,651 | 2,993,219 |
| Materials and services | 6,435,492 | 6,375,492 | 4,891,689 | 1,483,803 |
| Capital outlay | 79,905 | 139,905 | 111,656 | 28,249 |
| Operating contingency | 1,471,910 | 1,391,382 | - | 1,391,382 |
| Total expenditures | <u>56,783,649</u> | <u>56,783,649</u> | <u>50,886,996</u> | <u>5,896,653</u> |
| Revenues over-(under) expenditures | <u>(5,298,574)</u> | <u>(5,298,574)</u> | <u>4,911,851</u> | <u>10,210,425</u> |
| Other financing sources-(uses): | | | | |
| Transfers in | 150,000 | 150,000 | 297,401 | 147,401 |
| Transfers out | <u>(1,900,518)</u> | <u>(1,900,518)</u> | <u>(1,607,891)</u> | <u>292,627</u> |
| Total other financing sources-(uses) | <u>(1,750,518)</u> | <u>(1,750,518)</u> | <u>(1,310,490)</u> | <u>440,028</u> |
| Revenues and other sources over-(under) expenditures and other uses | <u>(7,049,092)</u> | <u>(7,049,092)</u> | <u>3,601,361</u> | <u>10,650,453</u> |
| Fund balance - July 1, 2020 | <u>7,049,092</u> | <u>7,049,092</u> | <u>6,746,067</u> | <u>(303,025)</u> |
| Fund balance - June 30, 2021 | <u>\$ -</u> | <u>\$ -</u> | <u>\$10,347,428</u> | <u>\$ 10,347,428</u> |

LINN-BENTON COMMUNITY COLLEGE

Schedule of Revenues, Expenditures and Changes in
Fund Balance - Budget and Actual
SPECIAL PROJECTS FUND
Year Ended June 30, 2021

| | Budgeted Amounts | | Actual Amounts | Variance With Final Budget Positive (Negative) |
|--|-------------------|-------------------|---------------------|---|
| | Original | Final | | |
| Revenues: | | | | |
| Tuition and fees | \$ 196,000 | \$ 196,000 | \$ 99,636 | \$ (96,364) |
| Other local | 2,920,490 | 3,031,490 | 1,150,032 | (1,881,458) |
| Intergovernmental - state and federal | 7,484,753 | 14,478,713 | 14,370,918 | (107,795) |
| Other | - | - | 14,812 | 14,812 |
| | <u>10,601,243</u> | <u>17,706,203</u> | <u>15,635,398</u> | <u>(2,070,805)</u> |
| Expenditures: | | | | |
| Personal services | 5,343,808 | 5,992,328 | 4,502,851 | 1,489,477 |
| Materials and services | 5,740,933 | 12,197,373 | 10,871,233 | 1,326,140 |
| Capital outlay | 256,496 | 256,496 | 85,178 | 171,318 |
| Contingency | 133,895 | 133,895 | - | 133,895 |
| | <u>11,475,132</u> | <u>18,580,092</u> | <u>15,459,262</u> | <u>3,120,830</u> |
| Revenues over-(under) expenditures | (873,889) | (873,889) | 176,136 | 1,050,025 |
| Other financing sources-(uses): | | | | |
| Transfers in | - | - | 136,606 | 136,606 |
| Revenues and other sources over-(under) expenditures and other uses | (873,889) | (873,889) | 312,742 | 1,186,631 |
| Fund balance - July 1, 2020 | <u>873,889</u> | <u>873,889</u> | <u>774,226</u> | <u>(99,663)</u> |
| Fund balance - June 30, 2021 | <u>\$ -</u> | <u>\$ -</u> | <u>\$ 1,086,968</u> | <u>\$ 1,086,968</u> |

LINN-BENTON COMMUNITY COLLEGE

Schedule of Revenues, Expenditures and Changes in
Fund Balance - Budget and Actual
AUXILIARY FUND
Year Ended June 30, 2021

| | Budgeted Amounts | | Actual Amounts | Variance With Final Budget Positive (Negative) |
|--|------------------------|------------------------|-------------------------|---|
| | Original | Final | | |
| Revenues: | | | | |
| Tuition and fees | \$ 4,232,004 | \$ 4,232,004 | \$ 2,124,758 | \$ (2,107,246) |
| Other local | 2,104,909 | 2,104,909 | 1,178,677 | (926,232) |
| Intergovernmental - state and federal | 4,500 | 4,500 | 588,028 | 583,528 |
| Student activities and sales | 5,582,370 | 5,582,370 | 1,799,737 | (3,782,633) |
| Other | 42,400 | 42,400 | 63,560 | 21,160 |
| Total revenues | <u>11,966,183</u> | <u>11,966,183</u> | <u>5,754,760</u> | <u>(6,211,423)</u> |
| Expenditures: | | | | |
| Personal services | 4,460,670 | 4,460,670 | 2,303,009 | 2,157,661 |
| Materials and services | 7,870,470 | 7,870,470 | 2,514,962 | 5,355,508 |
| Capital outlay | 689,794 | 689,794 | 32,095 | 657,699 |
| Operating contingency | 228,771 | 228,771 | - | 228,771 |
| Total expenditures | <u>13,249,705</u> | <u>13,249,705</u> | <u>4,850,066</u> | <u>8,399,639</u> |
| Revenues over-(under) expenditures | <u>(1,283,522)</u> | <u>(1,283,522)</u> | <u>904,694</u> | <u>2,188,216</u> |
| Other financing sources-(uses): | | | | |
| Transfers in | 229,351 | 229,351 | - | (229,351) |
| Transfers out | (234,894) | (234,894) | (760,468) | (525,574) |
| Total other financing sources-(uses) | <u>(5,543)</u> | <u>(5,543)</u> | <u>(760,468)</u> | <u>(754,925)</u> |
| Revenues and other sources over-(under) expenditures and other uses | <u>(1,289,065)</u> | <u>(1,289,065)</u> | <u>144,226</u> | <u>1,433,291</u> |
| Fund balance - July 1, 2020 | <u>1,289,065</u> | <u>1,289,065</u> | <u>3,797,730</u> | <u>2,508,665</u> |
| Fund balance - June 30, 2021 | <u>\$ -</u> | <u>\$ -</u> | <u>\$ 3,941,956</u> | <u>\$ 3,941,956</u> |

LINN-BENTON COMMUNITY COLLEGE

Schedule of Revenues, Expenditures and Changes in
Fund Balance - Budget and Actual
FINANCIAL AID FUND
Year Ended June 30, 2021

| | Budgeted Amounts | | Actual Amounts | Variance With Final Budget Positive (Negative) |
|---|-------------------|-------------------|-------------------|---|
| | Original | Final | | |
| Revenues: | | | | |
| Intergovernmental - state | \$ 8,506,000 | \$ 8,506,000 | \$ 3,247,784 | \$ (5,258,216) |
| Intergovernmental - federal | 11,541,312 | 11,541,312 | 5,858,017 | (5,683,295) |
| Scholarships | 205,000 | 205,000 | 265,911 | 60,911 |
| Other | 1,373,500 | 1,373,500 | 963,050 | (410,450) |
| Total revenues | <u>21,625,812</u> | <u>21,625,812</u> | <u>10,334,762</u> | <u>(11,291,050)</u> |
| Expenditures: | | | | |
| Personal services | 253,636 | 253,636 | 52,009 | 201,627 |
| Materials and services | 21,481,876 | 21,481,876 | 10,319,499 | 11,162,377 |
| Total expenditures | <u>21,735,512</u> | <u>21,735,512</u> | <u>10,371,508</u> | <u>11,364,004</u> |
| Revenues over-(under) expenditures | <u>(109,700)</u> | <u>(109,700)</u> | <u>(36,746)</u> | <u>72,954</u> |
| Other financing sources-(uses): | | | | |
| Transfers in | 72,200 | 72,200 | 16,493 | (55,707) |
| Transfers out | (15,000) | (15,000) | - | 15,000 |
| Total other financing sources-(uses) | <u>57,200</u> | <u>57,200</u> | <u>16,493</u> | <u>(40,707)</u> |
| Revenues and other sources over-(under) expenditures and other uses | (52,500) | (52,500) | (20,253) | 32,247 |
| Fund balance - July 1, 2020 | <u>52,500</u> | <u>52,500</u> | <u>151,841</u> | <u>99,341</u> |
| Fund balance - June 30, 2021 | <u>\$ -</u> | <u>\$ -</u> | <u>\$ 131,588</u> | <u>\$ 131,588</u> |

LINN-BENTON COMMUNITY COLLEGE

Schedule of Revenues, Expenditures and Changes in
Fund Balance - Budget and Actual
CAPITAL PROJECTS FUND
Year Ended June 30, 2021

| | Budgeted Amounts | | Actual Amounts | Variance With Final Budget Positive (Negative) |
|---|---------------------|---------------------|---------------------|---|
| | Original | Final | | |
| Revenues: | | | | |
| Intergovernmental - state and federal | \$ - | \$ - | \$ 36,312 | \$ 36,312 |
| Other: | | | | |
| Interest | 146,200 | 146,200 | 52,920 | (93,280) |
| Miscellaneous | 4,000 | 4,000 | 49,481 | 45,481 |
| Total revenues | <u>150,200</u> | <u>150,200</u> | <u>138,713</u> | <u>(11,487)</u> |
| Expenditures: | | | | |
| Materials and services | 1,816,950 | 1,816,950 | 1,154,221 | 662,729 |
| Capital outlay | 14,471,450 | 14,471,450 | 5,607,888 | 8,863,562 |
| Total expenditures | <u>16,288,400</u> | <u>16,288,400</u> | <u>6,762,109</u> | <u>9,526,291</u> |
| Revenues over-(under) expenditures | <u>(16,138,200)</u> | <u>(16,138,200)</u> | <u>(6,623,396)</u> | <u>9,514,804</u> |
| Other financing sources-(uses): | | | | |
| Proceeds from issuance of long term debt | 6,850,000 | 6,850,000 | 7,969,960 | 1,119,960 |
| Transfers in | 933,750 | 933,750 | 933,250 | (500) |
| Transfers out | - | - | (136,606) | (136,606) |
| Total other financing sources-(uses) | <u>7,783,750</u> | <u>7,783,750</u> | <u>8,766,604</u> | <u>982,854</u> |
| Revenues and other sources over-(under) expenditures and other uses | (8,354,450) | (8,354,450) | 2,143,208 | 10,497,658 |
| Fund balance - July 1, 2020 | <u>8,354,450</u> | <u>8,354,450</u> | <u>5,432,961</u> | <u>(2,921,489)</u> |
| Fund balance - June 30, 2021 | <u>\$ -</u> | <u>\$ -</u> | <u>\$ 7,576,169</u> | <u>\$ 7,576,169</u> |

LINN-BENTON COMMUNITY COLLEGE

Schedule of Revenues, Expenditures and Changes in
Fund Balance - Budget and Actual
DEBT SERVICE FUND
Year Ended June 30, 2021

| | Budgeted Amounts | | Actual Amounts | Variance With Final Budget Positive (Negative) |
|--|------------------|------------------|-------------------|---|
| | Original | Final | | |
| Revenues: | | | | |
| Property taxes | \$ 3,070,350 | \$ 3,070,350 | \$ 3,177,634 | \$ 107,284 |
| Other: | | | | |
| Miscellaneous | 2,875,362 | 2,875,362 | 2,766,545 | (108,817) |
| Interest | - | - | 23,825 | 23,825 |
| Total revenues | <u>5,945,712</u> | <u>5,945,712</u> | <u>5,968,004</u> | <u>22,292</u> |
| Expenditures: | | | | |
| Debt service: | | | | |
| Principal | 4,505,992 | 4,505,992 | 4,255,992 | 250,000 |
| Interest | <u>2,406,488</u> | <u>2,406,488</u> | <u>2,387,032</u> | <u>19,456</u> |
| Total expenditures | <u>6,912,480</u> | <u>6,912,480</u> | <u>6,643,024</u> | <u>269,456</u> |
| Revenues over-(under) expenditures | (966,768) | (966,768) | (675,020) | 291,748 |
| Other financing sources-(uses): | | | | |
| Transfers in | <u>966,768</u> | <u>966,768</u> | <u>697,312</u> | <u>(269,456)</u> |
| Revenues and other sources over-(under) expenditures and other uses | - | - | 22,292 | 22,292 |
| Fund balance - July 1, 2020 | <u>-</u> | <u>-</u> | <u>520,503</u> | <u>520,503</u> |
| Fund balance - June 30, 2021 | <u>\$ -</u> | <u>\$ -</u> | <u>\$ 542,795</u> | <u>\$ 542,795</u> |

LINN-BENTON COMMUNITY COLLEGE

Schedule of Revenues, Expenditures and Changes in
Fund Balance - Budget and Actual
ENTERPRISE FUND
Year Ended June 30, 2021

| | Budgeted Amounts | | Actual Amounts | Variance With Final Budget Positive (Negative) |
|--|--------------------|--------------------|--------------------|---|
| | Original | Final | | |
| Other financing sources-(uses): | | | | |
| Transfers in | \$ - | \$ - | \$ 423,903 | \$ 423,903 |
| Transfers out | <u>(200,000)</u> | <u>(200,000)</u> | <u>-</u> | <u>200,000</u> |
| Revenues and other sources over-(under) expenditures and other uses | (200,000) | (200,000) | 423,903 | 623,903 |
| Fund balance - July 1, 2020 | <u>200,000</u> | <u>200,000</u> | <u>(423,903)</u> | <u>(623,903)</u> |
| Fund balance - June 30, 2021 | <u><u>\$ -</u></u> | <u><u>\$ -</u></u> | <u><u>\$ -</u></u> | <u><u>\$ -</u></u> |

LINN-BENTON COMMUNITY COLLEGE

Schedule of Revenues, Expenditures and Changes in
 Due to Others - Budget and Actual
 ASLBCC, CLUBS AND WORKFORCE AGENCY FUND
 Year Ended June 30, 2021

| | Budgeted Amounts | | Actual Amounts | Variance With Final Budget Positive (Negative) |
|--|------------------|----------------|-------------------|---|
| | Original | Final | | |
| Revenues: | | | | |
| Fees | \$ 199,521 | \$199,521 | \$112,994 | \$ (86,527) |
| Club sources | 29,606 | 29,606 | 3,859 | (25,747) |
| Other | - | - | 3,964 | 3,964 |
| Total revenues | <u>229,127</u> | <u>229,127</u> | <u>120,817</u> | <u>(108,310)</u> |
| Expenditures: | | | | |
| Personal services | 12,605 | 12,605 | 11,863 | 742 |
| Materials and services | 265,976 | 265,976 | 156,478 | 109,498 |
| Contingency | 59 | 59 | - | 59 |
| Total expenditures | <u>278,640</u> | <u>278,640</u> | <u>168,341</u> | <u>110,299</u> |
| Revenues over-(under) expenditures | (49,513) | (49,513) | (47,524) | 1,989 |
| Other financing sources-(uses): | | | | |
| Transfers out | <u>(1,657)</u> | <u>(1,657)</u> | <u>-</u> | <u>1,657</u> |
| Revenues and other sources over-(under) expenditures and other uses | (51,170) | (51,170) | (47,524) | 3,646 |
| Due to others - July 1, 2020 | <u>51,170</u> | <u>51,170</u> | <u>224,285</u> | <u>173,115</u> |
| Due to others - June 30, 2021 | <u>\$ -</u> | <u>\$ -</u> | <u>\$176,761</u> | <u>\$ 176,761</u> |

***INDEPENDENT AUDITOR'S COMMENTS REQUIRED BY
OREGON STATE REGULATIONS***

INDEPENDENT AUDITOR'S COMMENTS
REQUIRED BY OREGON STATE REGULATIONS

November 8, 2021

Board of Education
Linn-Benton Community College
Albany, Oregon

We have audited, 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, the financial statements of Linn-Benton Community College as of and for the year ended June 30, 2021, and have issued our report thereon dated November 8, 2021.

Internal Control Over Financial Reporting

Our report on Linn-Benton Community College's internal control over financial reporting is presented elsewhere in this Annual Financial Report.

Compliance

As part of obtaining reasonable assurance about whether Linn-Benton Community College's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts and grant agreements, including the provisions of Oregon Revised Statutes as specified in Oregon Administrative Rules 162-10-000 through 162-10-320 of the Minimum Standards for Audits of Oregon Municipal Corporations, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit and, accordingly, we do not express such an opinion.

We performed procedures to the extent we considered necessary to address the required comments and disclosures which included, but were not limited to, the following:

- Deposit of public funds with financial institutions (ORS Chapter 295).
- Indebtedness limitations, restrictions and repayment.
- Budgets legally required (ORS Chapter 294).
- Insurance and fidelity bonds in force or required by law.
- Programs funded from outside sources.
- Authorized investment of surplus funds (ORS Chapter 294).
- Public contracts and purchasing (ORS Chapters 279A, 279B, 279C).

In connection with our testing nothing came to our attention that caused us to believe Linn-Benton Community College was not in substantial compliance with certain provisions of laws, regulations, contracts and grant agreements, including the provisions of Oregon Revised Statutes as specified in Oregon Administrative Rules 162-10-000 through 162-10-320 of the Minimum Standards for Audits of Oregon Municipal Corporations, except as described in the following paragraph.

As discussed in Note 8 to the financial statements, the College overexpended certain appropriations during the year. ORS 294.456(6) provides that no greater amount be expended than appropriated except as specifically provided by law.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance. Accordingly, this communication is not suitable for any other purpose.

This report is intended solely for the information and use of the Board of Education, management and the Oregon Secretary of State and is not intended to be and should not be used by anyone other than these specified parties.

Kenneth Kuhns & Co.

Kenneth Kuhns & Co.

***DISCLOSURES IN ACCORDANCE WITH GOVERNMENT
AUDITING STANDARDS***

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CERTIFIED PUBLIC ACCOUNTANTS
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SALEM OREGON 97301-3594
TELEPHONE (503) 585-2550

INDEPENDENT AUDITOR'S REPORT ON THE INTERNAL CONTROL OVER
FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER
MATTERS BASED ON AN AUDIT OF THE FINANCIAL
STATEMENTS PERFORMED IN ACCORDANCE WITH
GOVERNMENT AUDITING STANDARDS

November 8, 2021

Board of Education
Linn-Benton Community College
Albany, Oregon

We have audited, 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, the financial statements of Linn-Benton Community College as of and for the year ended June 30, 2021, and have issued our report thereon dated November 8, 2021.

Internal Control Over Financial Reporting

In planning and performing our audit of the financial statements, we considered Linn-Benton Community College's internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of Linn-Benton Community College's internal control. Accordingly, we do not express an opinion on the effectiveness of Linn-Benton Community College's internal control.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. *A material weakness* is a deficiency, or combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected, on a timely basis. *A significant deficiency* is a deficiency, or combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

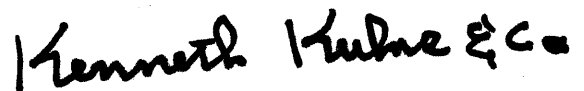
Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

Compliance and Other Matters

As part of obtaining reasonable assurance about whether Linn-Benton Community College's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit and, accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this Report

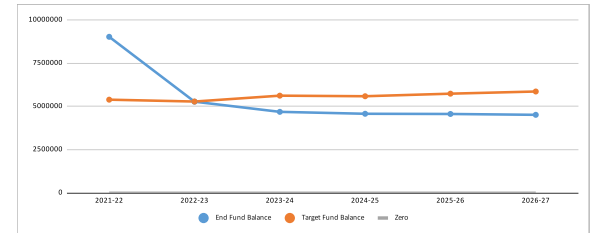
The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.



Kenneth Kuhns & Co.

| | Actual | Actual | Actual | Actual | Actual | Actual | Actual | 2019-21 | | 2021-23 Biennium | | 2023-25 Biennium | | 2025-27 Biennium | |
|----------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------------|----------------|------------------|----------------|------------------|--|
| | 2013-14 | 2014-15 | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 | 2020-21 | 2021-22 | 2022-23 | 2023-24 | 2024-25 | 2025-26 | 2026-27 | |
| Beg. Fund Balance | \$ 1,734,558 | \$ 6,632,545 | \$ 6,927,836 | \$ 7,994,608 | \$ 8,074,630 | \$ 7,543,767 | \$ 6,783,939 | \$ 6,746,067 | \$ 9,347,430 | \$ 9,023,032 | \$ 5,271,494 | \$ 4,683,628 | \$ 4,572,056 | \$ 4,560,126 | |
| State Aid | 21,826,984 | 18,070,324 | 19,455,772 | 19,291,026 | 20,580,086 | 21,055,579 | 23,455,946 | 23,290,089 | 24,862,703 | 24,310,390 | 25,525,910 | 25,525,910 | 26,802,205 | 26,802,205 | |
| Property Tax | 6,574,853 | 7,085,933 | 7,333,649 | 7,779,054 | 8,102,243 | 8,732,232 | 8,927,878 | 9,264,057 | 9,543,701 | 9,973,168 | 10,421,960 | 10,890,948 | 11,381,041 | 11,893,188 | |
| Tuition | 17,639,318 | 17,506,012 | 17,254,696 | 18,396,073 | 19,029,068 | 20,305,971 | 20,322,823 | 19,080,698 | 16,995,200 | 16,860,623 | 17,130,758 | 17,832,058 | 18,545,341 | 19,287,154 | |
| In-State | | | 16,760,218 | 16,641,063 | 17,644,114 | 18,884,553 | 18,951,827 | 17,942,373 | 16,328,223 | 16,132,284 | 16,358,136 | 17,012,462 | 17,692,960 | 18,400,679 | |
| International/Out of State | | | 494,478 | 1,755,010 | 1,384,954 | 1,421,418 | 1,370,996 | 1,138,325 | 666,977 | 728,338 | 772,621 | 819,597 | 853,381 | 886,476 | |
| Interest | 105,187 | 114,799 | 136,489 | 290,304 | 464,528 | 486,420 | 302,425 | 118,869 | 57,637 | 58,419 | 35,836 | 33,432 | 34,267 | 35,887 | |
| Misc. Revenue | 520,522 | 445,615 | 354,329 | 593,994 | 529,454 | 346,132 | 462,955 | 961,755 | 465,100 | 441,845 | 430,799 | 430,799 | 430,799 | 430,799 | |
| Transfer In | 264,482 | 254,729 | 210,836 | 232,506 | 417,845 | 189,517 | 150,000 | 297,401 | 150,000 | 150,000 | 150,000 | 150,000 | 150,000 | 150,000 | |
| HEERF/ERC | | | | | | | | 3,083,379 | 1,800,000 | 1,000,000 | 2,500,000 | 1,000,000 | - | - | |
| Total Revenue | 46,931,346 | 43,477,412 | 44,745,771 | 46,582,957 | 49,123,224 | 51,115,851 | 53,622,027 | 56,096,248 | 53,874,341 | 52,794,444 | 56,195,262 | 55,863,147 | 57,343,653 | 58,599,233 | |
| Total Resources | 48,665,904 | 50,109,957 | 51,673,607 | 54,577,564 | 57,197,854 | 58,659,618 | 60,405,966 | 59,758,936 | 61,421,770 | 60,817,476 | 58,966,756 | 59,546,775 | 61,915,709 | 63,159,359 | |
| Personnel Costs | \$ 35,650,376 | \$ 36,715,794 | \$ 38,165,342 | \$ 39,924,698 | \$ 42,591,120 | \$ 44,862,842 | \$ 46,272,383 | \$ 45,883,649 | \$ 46,341,440 | \$ 47,974,174 | \$ 50,240,373 | \$ 49,314,684 | \$ 49,821,535 | \$ 49,637,313 | |
| Salaries | 23,998,962 | 24,911,347 | 25,687,418 | 26,961,414 | 28,461,632 | 30,110,832 | 30,263,878 | 29,880,144 | 30,529,038 | 31,594,376 | 32,456,370 | 31,045,400 | 29,599,156 | 28,866,755 | |
| Health Insurance | 7,060,865 | 5,062,993 | 5,455,198 | 5,563,909 | 5,899,852 | 6,097,869 | 6,190,375 | 6,072,271 | 5,999,760 | 6,179,752 | 6,365,145 | 6,556,099 | 6,752,782 | 6,955,366 | |
| PERS | 4,590,549 | 4,634,692 | 4,903,429 | 5,184,024 | 6,030,679 | 6,381,381 | 7,380,103 | 7,559,816 | 7,469,542 | 7,772,712 | 8,927,321 | 9,159,359 | 10,851,926 | 11,132,078 | |
| Other Payroll Costs | 2,106,762 | 2,119,297 | 2,215,350 | 2,198,957 | 2,272,761 | 2,438,027 | 2,371,418 | 2,343,100 | 2,427,335 | 2,491,538 | 2,553,826 | 2,617,672 | 2,683,113 | | |
| Materials/Services | 4,887,522 | 4,953,352 | 5,044,347 | 5,179,092 | 5,497,939 | 5,603,361 | 5,761,200 | 5,003,345 | 5,842,980 | 5,959,840 | 6,079,036 | 6,200,617 | 6,324,629 | 6,451,122 | |
| Performance Packages | | | | | | | | | | 300,000 | 300,000 | 300,000 | 300,000 | 300,000 | |
| Strategic Investments | | | | | | | | | | 400,000 | 400,000 | 400,000 | 400,000 | 400,000 | |
| Operational Efficiencies | | | | | | | | | | (250,000) | (2,500,000) | (2,500,000) | (1,750,000) | (400,000) | |
| Transfer Out | 1,495,461 | 1,512,975 | 1,497,705 | 1,399,145 | 1,565,028 | 1,564,493 | 1,626,316 | 1,607,891 | 2,014,318 | 2,161,968 | 2,263,718 | 2,259,418 | 2,259,418 | 2,259,418 | |
| Contingency | | | | 4,658,296 | 4,912,322 | 5,111,585 | 5,362,203 | 5,609,625 | 5,387,434 | 5,279,444 | 5,619,526 | 5,586,315 | 5,734,365 | 5,859,923 | |
| Total Expenditures | 42,033,359 | 43,182,121 | 44,707,394 | 46,502,935 | 49,654,087 | 52,030,696 | 53,659,899 | 52,494,885 | 54,198,738 | 56,545,982 | 56,783,128 | 55,974,719 | 57,355,583 | 58,647,853 | |
| Total Requirements | | | 51,161,230 | 54,566,409 | 57,142,281 | 59,022,102 | 58,104,510 | 59,586,172 | 61,825,426 | 62,402,654 | 61,561,034 | 63,089,948 | 64,507,776 | | |
| Rev Over/Under Exp. | 4,897,987 | 295,291 | 38,377 | 80,022 | (530,863) | (914,845) | (37,872) | 3,601,363 | (324,398) | (3,751,538) | (587,866) | (111,572) | (11,930) | (48,620) | |
| End. Fund Balance | \$ 6,632,545 | \$ 6,927,836 | \$ 6,966,213 | \$ 8,074,630 | \$ 7,543,767 | \$ 6,628,922 | \$ 6,746,067 | \$ 10,347,430 | \$ 9,023,032 | \$ 5,271,494 | \$ 4,683,628 | \$ 4,572,056 | \$ 4,560,126 | \$ 4,511,506 | |
| Over/Under EFB | | | \$ 3,416,334 | \$ 2,631,444 | \$ 1,517,337 | \$ 1,383,864 | \$ 4,737,805 | \$ 3,635,598 | \$ (7,950) | \$ (935,898) | \$ (1,014,258) | \$ (1,174,239) | \$ (1,348,417) | | |

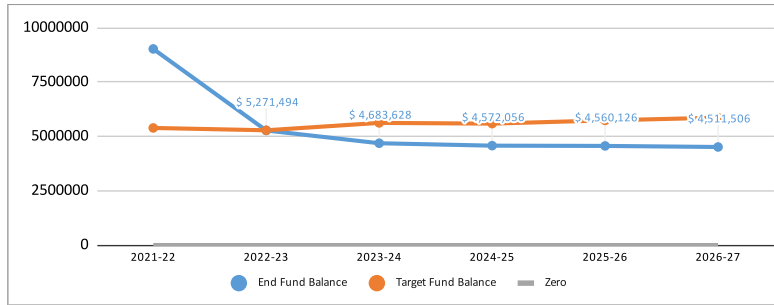
| Growth Assumptions | | | | | | |
|----------------------|---------|---------|---------|---------|---------|---------|
| Variables | 2021-22 | 2022-23 | 2023-24 | 2024-25 | 2025-26 | 2026-27 |
| REVENUE | | | | | | |
| IS Tuition | 3.50% | 4.00% | 4.00% | 4.00% | 4.00% | 4.00% |
| Int'l Tuition | 3.50% | 4.00% | 4.00% | 4.00% | 4.00% | 4.00% |
| IS Enrollment | -2.00% | -5.00% | -2.50% | 0.00% | 0.00% | 0.00% |
| Int'l/OOS Enrollment | 5.00% | 5.00% | 2.00% | 2.00% | 0.00% | 0.00% |
| State Aid | 7.11% | -0.38% | 5.00% | 0.00% | 5.00% | 0.00% |
| Property Tax | 4.50% | 4.50% | 4.50% | 4.50% | 4.50% | 4.50% |
| EXPENSES | | | | | | |
| PT Faculty | 2.50% | 5.50% | 2.50% | 2.50% | 2.50% | 2.50% |
| Faculty | 2.50% | 3.50% | 2.50% | 2.50% | 2.50% | 2.50% |
| Management | 2.50% | 3.50% | 2.50% | 2.50% | 2.50% | 2.50% |
| Classified | 2.50% | 3.00% | 3.00% | 2.50% | 2.50% | 2.50% |
| PERS | 8.40% | 0.00% | 20.90% | 0.00% | 20.90% | 0.00% |
| Health Insur | 3.00% | 3.00% | 3.00% | 3.00% | 3.00% | 3.00% |
| M&S | 2.00% | 2.00% | 2.00% | 2.00% | 2.00% | 2.00% |



#DIV/0! #DIV/0!

| | 2021-23 Biennium | | 2023-25 Biennium | | 2025-27 Biennium | |
|---|----------------------|-----------------------|----------------------|----------------------|----------------------|----------------------|
| | 2021-22 | 2022-23 | 2023-24 | 2024-25 | 2025-26 | 2026-27 |
| State Aid | 24,862,703 | 24,310,390 | 25,525,910 | 25,525,910 | 26,802,205 | 26,802,205 |
| Property Tax | 9,543,701 | 9,973,168 | 10,421,960 | 10,890,948 | 11,381,041 | 11,893,188 |
| Tuition | 16,995,200 | 16,860,623 | 17,130,758 | 17,832,058 | 18,545,341 | 19,287,154 |
| Other Revenue | 672,737 | 650,264 | 616,635 | 614,231 | 615,066 | 616,685 |
| 4,500,000 HEERF/ERC | 1,800,000 | 1,000,000 | 2,500,000 | 1,000,000 | - | - |
| Revenue | \$ 53,874,341 | \$ 52,794,444 | \$ 56,195,262 | \$ 55,863,147 | \$ 57,343,653 | \$ 58,599,233 |
| Personnel Costs | 46,341,440 | 47,974,174 | 50,240,373 | 49,314,684 | 49,821,535 | 49,637,313 |
| Materials/Services | 5,842,980 | 5,959,840 | 6,079,036 | 6,200,617 | 6,324,629 | 6,451,122 |
| Transfers Out | 2,014,318 | 2,161,968 | 2,263,718 | 2,259,418 | 2,259,418 | 2,259,418 |
| Budget Enhancements | | 300,000 | 300,000 | 300,000 | 300,000 | 300,000 |
| Strategic Investments | | 400,000 | 400,000 | 400,000 | 400,000 | 400,000 |
| (7,400,000) Operational Efficiencies | | (250,000) | (2,500,000) | (2,500,000) | (1,750,000) | (400,000) |
| Expenses | \$ 54,198,738 | \$ 56,545,982 | \$ 56,783,128 | \$ 55,974,719 | \$ 57,355,583 | \$ 58,647,853 |
| Net | \$ (324,398) | \$ (3,751,538) | \$ (587,866) | \$ (111,572) | \$ (11,930) | \$ (48,620) |

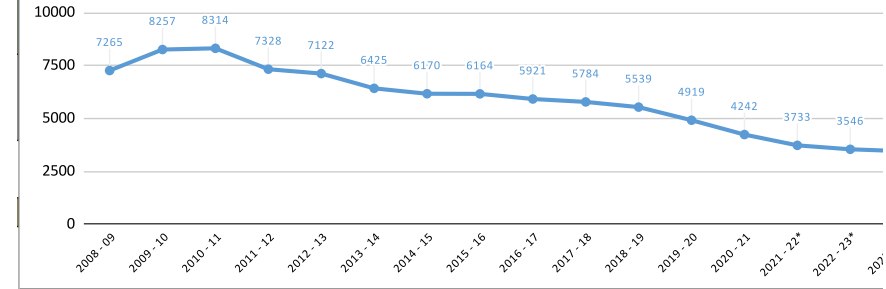
Total Fund Balance Used \$ (324,398) \$ (4,075,936) \$ (4,663,801) \$ (4,775,374) \$ (4,787,303) \$ (4,835,924)



| | 2021-22 | 2022-23 | 2023-24 | 2024-25 | 2025-26 | 2026-27 |
|---------------------|--------------|--------------|--------------|--------------|--------------|--------------|
| End Fund Balance | \$ 9,023,032 | \$ 5,271,494 | \$ 4,683,628 | \$ 4,572,056 | \$ 4,560,126 | \$ 4,511,506 |
| Target Fund Balance | \$ 5,387,434 | \$ 5,279,444 | \$ 5,619,526 | \$ 5,586,315 | \$ 5,734,365 | \$ 5,859,923 |
| Zero | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |

Over(Under) \$ (7,950) \$ (935,898) \$ (1,014,258) \$ (1,174,239) \$ (1,348,417)

| Growth Assumptions | | | | | |
|--------------------|---------|---------|---------|---------|---------|
| Variables | 2022-23 | 2023-24 | 2024-25 | 2025-26 | 2026-27 |
| REVENUE | | | | | |
| IS Tuition | 4.00% | 4.00% | 4.00% | 4.00% | 4.00% |
| Int'l Tuition | 4.00% | 4.00% | 4.00% | 4.00% | 4.00% |
| IS Enrollment | -5.00% | -2.50% | 0.00% | 0.00% | 0.00% |
| Int'l Enrollment | 5.00% | 2.00% | 2.00% | 0.00% | 0.00% |
| State Aid | -0.38% | 5.00% | 0.00% | 5.00% | 0.00% |
| Property Tax | 4.50% | 4.50% | 4.50% | 4.50% | 4.50% |
| EXPENSES | | | | | |
| PT Faculty | 5.50% | 2.50% | 2.50% | 2.50% | 2.50% |
| Faculty | 3.50% | 2.50% | 2.50% | 2.50% | 2.50% |
| Management | 3.50% | 2.50% | 2.50% | 2.50% | 2.50% |
| Classified | 3.00% | 3.00% | 2.50% | 2.50% | 2.50% |
| PERS | 0.00% | 20.90% | 0.00% | 20.90% | 0.00% |
| Health Insur | 3.00% | 3.00% | 3.00% | 3.00% | 3.00% |
| M&S | 2.00% | 2.00% | 2.00% | 2.00% | 2.00% |



| Transfer | 2021-22 | 2022-23 | 2023-24 | 2024-25 | 2025-26 | 2026-27 |
|-------------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| Roof Reserve | \$ 50,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 |
| Major Maintenance | \$ 355,000 | \$ 355,000 | \$ 355,000 | \$ 355,000 | \$ 355,000 | \$ 355,000 |
| Technology Reserve | \$ 500,000 | \$ 500,000 | \$ 500,000 | \$ 500,000 | \$ 500,000 | \$ 500,000 |
| Instructional Equipment | \$ - | \$ - | \$ 100,000 | \$ 100,000 | \$ 100,000 | \$ 100,000 |
| General Equipment | \$ 30,000 | \$ 30,000 | \$ 30,000 | \$ 30,000 | \$ 30,000 | \$ 30,000 |
| Debt Service | \$ 1,079,318 | \$ 1,076,968 | \$ 1,078,718 | \$ 1,074,418 | \$ 1,074,418 | \$ 1,074,418 |
| 2017 FFCO's | \$ 467,168 | \$ 466,968 | \$ 466,168 | \$ 464,768 | \$ 464,768 | \$ 464,768 |
| 2021 FFCO's | \$ 612,150 | \$ 610,000 | \$ 612,550 | \$ 609,650 | \$ 609,650 | \$ 609,650 |
| Total | \$ 2,014,318 | \$ 2,161,968 | \$ 2,263,718 | \$ 2,259,418 | \$ 2,259,418 | \$ 2,259,418 |

| | | | |
|--------|--------|--------|--------|
| 582600 | 582600 | 582600 | 582600 |
| 637400 | 637400 | 637400 | 637400 |
| 731186 | 731186 | 731186 | 731186 |
| 54800 | 54800 | 54800 | 54800 |
| 148586 | 148586 | 148586 | 148586 |

| | | | |
|--------------|--------------|--------------|--------------|
| \$ 2,069,118 | \$ 2,216,768 | \$ 2,318,518 | \$ 2,314,218 |
| \$ 2,162,904 | \$ 2,310,554 | \$ 2,412,304 | \$ 2,408,004 |
| \$ 1,212,012 | \$ 2,109,666 | \$ 1,641,365 | \$ 1,891,436 |

| | | | |
|--------------|--------------|---------------|---------------|
| \$ 1,157,212 | \$ 2,054,866 | \$ 1,586,565 | \$ 1,836,636 |
| \$ 1,063,426 | \$ 1,961,080 | \$ 1,492,779 | \$ 1,742,850 |
| \$ 7,592,126 | \$ 9,701,792 | \$ 11,343,157 | \$ 13,234,593 |
| \$ 7,537,326 | \$ 9,646,992 | \$ 11,288,357 | \$ 13,179,793 |
| \$ 7,443,540 | \$ 9,553,206 | \$ 11,194,571 | \$ 13,086,007 |



ADOPTED BUDGET

JULY 1, 2022 - JUNE 30, 2023

Linn-Benton Community College
 Adopted 2022-23 Budget
 Budget Committee Members

Local Budget Law requires that the Budget Committee be composed of the seven elected Board of Education members and seven appointed voters of the College District.

| <u>BOARD OF EDUCATION</u> | <u>TERM ENDS</u> | <u>CITIZEN MEMBERS</u> | <u>TERM ENDS</u> |
|-------------------------------|------------------|----------------------------|------------------|
| Tony Lapiz | 2023 | Jack Lehman | 2023 |
| Jeannie Davis | 2023 | Tom Oliver | 2023 |
| Dick Running | 2023 | Ryan Hansen | 2022 |
| Kristin Adams | 2023 | Lori McKinnon | 2022 |
| Jim Merryman | 2025 | Shane James | 2023 |
| John Sarna | 2025 | Patrick Malone | 2022 |
| Sherlyn Dahl | 2023 | Vacant | |

ADMINISTRATION

Lisa Avery, President

Ann Buchele, Vice President, Academic and Student Affairs

Sheldon Flom, Vice President, Finance and Operations

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College Mission, Values and Strategic Goals

Our Mission and Core Themes:

To engage in an education that enables all of us to participate in, contribute to, and benefit from the cultural richness and economic vitality of our communities.

- **Educational Attainment**
 - **Cultural Richness**
 - **Economic Vitality**
-

Our Values:

At Linn-Benton Community College, our values serve as the foundation that inspires our actions and unites us as a community. As responsible stewards, we are committed to:

- **Opportunity:** We support the fulfillment of potential in ourselves and each other.
 - **Excellence:** We aspire to the highest ideal with honesty and integrity.
 - **Inclusiveness:** We honor and embrace the uniqueness of every individual, and promote the free and civil expression of ideas, perspectives and cultures.
 - **Learning:** We commit to the lifelong pursuit of knowledge, skills and abilities to improve our lives and our communities.
 - **Engagement:** We openly and actively connect as students, faculty, staff and community.
-

Our Strategic Goals:

- **Productivity** - Increase completion to 50%
 - **Equity** - Completion that is demographically representative of District
 - **Quality** - Completion that demonstrates capacity to better one's life and contribute back to our community
-

Budget Categories

Funds

The college budgets using separate, self-balancing funds that are operated by independent rules based on the nature of the intended use. Descriptions of each of these funds are below with detailed budget resources and requirements outlined in the individual budget sections.

- General Fund –The primary operating fund of the college serving to accomplish its basic educational mission.
 - Auxiliary Fund – Self-balancing funds with specific purpose and dedicated charges.
 - Special Projects– Used to budget and account for grants, contracts and projects funded from federal, state, and local agencies. Funds are restricted to the purpose designated by the grantee and each individual fund has a net working capital account.
 - Capital Projects – Used for costs related to construction and improvement of college facilities and for the acquisition of major equipment.
 - Debt Service – Budgets and accounts for principal and interest payments related to the college’s long-term debt obligations.
 - Enterprise Fund – Accounts for college food services, bookstore, printing services, and other entrepreneurial activities that function similarly to private, self-supporting businesses.
 - Financial Aid Fund – Serves to account for grants, scholarships, loans and other aid processed for students.
 - Agency Fund – Used to account for funds relating to student government, student clubs and other outside agencies for which the college is acting as a fiscal agent.
-

Expense Functions

Within each fund expenses are budgeted and presented by major functional area. This serves as the category describing the basic purpose the funds support.

- Instruction – Includes all faculty costs and expenses for resources used directly for instruction in the classroom.
- Instructional Support – Costs directly supporting the instructional mission. Includes library services, program directors and other areas providing immediate support to students’ educational attainment.
- Student Services – Includes costs for registration, financial aid, enrollment, admissions and advising along with other services and efforts to support students outside of the classroom.
- Community Services – Covers costs related to non-instructional efforts toward public services external to the college’s primary educational mission.
- College Support – Includes general administration, human resources, financial operations and other expenses used to manage and maintain the college.
- Plant Operations/Maintenance – Costs relating to the operation of physical plant including grounds and repair.
- Plant Additions – Includes costs for major structural improvements relating to renovation of buildings, infrastructure, land or other areas outside of ongoing operational efforts.

President’s Budget Message

The budget herein is presented to the Linn-Benton Community College (LBCC) Budget Committee and district residents. This budget message provides both a description of our current budget environment and an outline of the fundamental approach to resource allocation moving forward.

The 2021-22 fiscal year has seen a continuation of the unprecedented reshaping of social, economic, and educational institutions and while LBCC has sought to be a cornerstone of strength and stability for the community, it has not been immune to this volatility. The enrollment declines triggered by the pandemic have continued through the 2021-22 fiscal year and have expanded the scope of the financial challenges on the horizon. Though federal support funds have provided significant relief for pandemic-related costs and the replacement of substantial lost revenue, the operational budget for 2022-23 and beyond must move the college toward a more sustainable model without reliance on one-time, external assistance. We believe that the budgetary tools and administrative approaches we have adopted over the past few years will be effective tools for constructing a budget that balances our ongoing pursuits with our financial realities.

As with previous budgets, the 2022-23 budget has been developed with an eye toward our future-facing projection model, which provides a strategic, long-term approach to resource allocation and ensures the college is poised to fund both ongoing operations and investments in the future despite the difficult realities of the community college funding (see Figure 1 for example).

| | 2021-23 Biennium | | 2023-25 Biennium | | 2025-27 Biennium | |
|--------------------------|----------------------|-----------------------|----------------------|----------------------|----------------------|----------------------|
| | 2021-22 | 2022-23 | 2023-24 | 2024-25 | 2025-26 | 2026-27 |
| State Aid | 24,862,703 | 24,767,790 | 26,006,180 | 26,006,180 | 27,306,488 | 27,306,488 |
| Property Tax | 9,660,067 | 10,094,770 | 10,549,035 | 11,023,741 | 11,519,810 | 12,038,201 |
| Tuition | 17,783,624 | 17,641,252 | 17,923,134 | 18,656,516 | 19,402,777 | 20,178,888 |
| Other Revenue | 640,911 | 612,468 | 578,647 | 560,386 | 553,575 | 554,281 |
| HEERF/ERC | 1,200,000 | - | 1,500,000 | 1,500,000 | - | - |
| Revenue | \$ 54,147,305 | \$ 53,116,280 | \$ 56,556,996 | \$ 57,746,823 | \$ 58,782,650 | \$ 60,077,859 |
| Personnel Costs | 46,433,869 | 47,992,558 | 50,265,331 | 50,090,556 | 51,123,998 | 51,222,645 |
| Materials/Services | 5,718,440 | 5,832,809 | 5,949,465 | 6,068,454 | 6,189,823 | 6,313,620 |
| Transfers Out | 2,191,316 | 2,161,968 | 2,263,718 | 2,259,418 | 2,259,418 | 2,259,418 |
| Budget Enhancements | - | 300,000 | 300,000 | 300,000 | 300,000 | 300,000 |
| Strategic Investments | - | 400,000 | 400,000 | 400,000 | 400,000 | 400,000 |
| Operational Efficiencies | - | (250,000) | (1,750,000) | (2,000,000) | (1,500,000) | (250,000) |
| Expenses | \$ 54,343,625 | \$ 56,437,335 | \$ 57,428,514 | \$ 57,118,428 | \$ 58,773,240 | \$ 60,245,683 |
| Net | \$ (196,320) | \$ (3,321,054) | \$ (871,519) | \$ 628,395 | \$ 9,410 | \$ (167,824) |

Figure 1 - The above projection model is constructed using variables for all major revenue and expense categories. The variables can be adjusted according to the latest projections and shifts in expectations making the model dynamic and flexible. New investments are built into the model as well as assumptions for inflation-based growth and other elements that make the model a picture of sustainable operations. With the mission “baked” into the model it is a matter of securing the funding so investment variables can be met.

Funding Model

The college operates on three primary revenue sources: property taxes, tuition and fees, and state appropriations. Reliance on these three sources has created a challenging dynamic with a limited number of balancing levers. This model, however, has not been static as shifts in the funding mix have created new budget considerations for the college. Figure 3 illustrates the historical change in each of the primary revenue sources. Increases in state funding in recent biennia have only started to account for the period of divestment from the state going back to 2008-09. The divestment created nearly a decade of unfunded increases in operating costs and also created a funding model more reliant on student tuition money. This has created challenges for affordability (tuition rates) and enabled the enrollment decline sparked by the pandemic more financially impactful. Further information on each of the primary revenue sources follows.

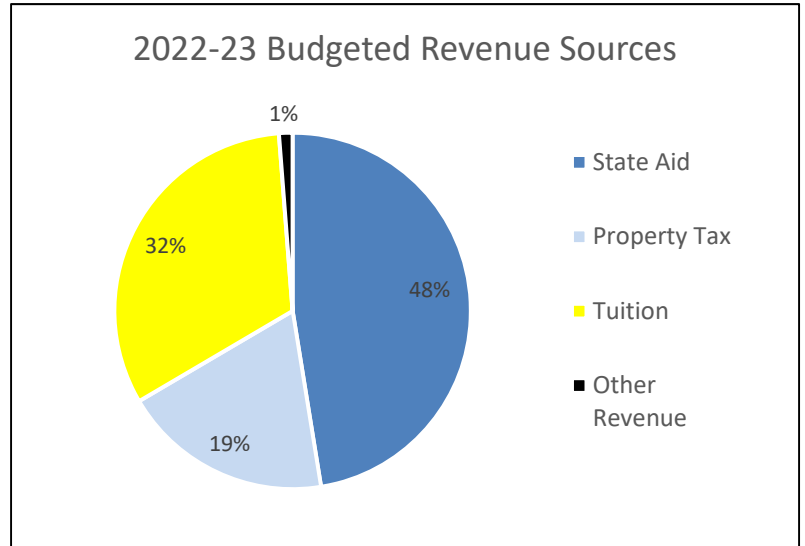


Figure 2- Tuition and State Aid provide a combined 81% of overall funding.

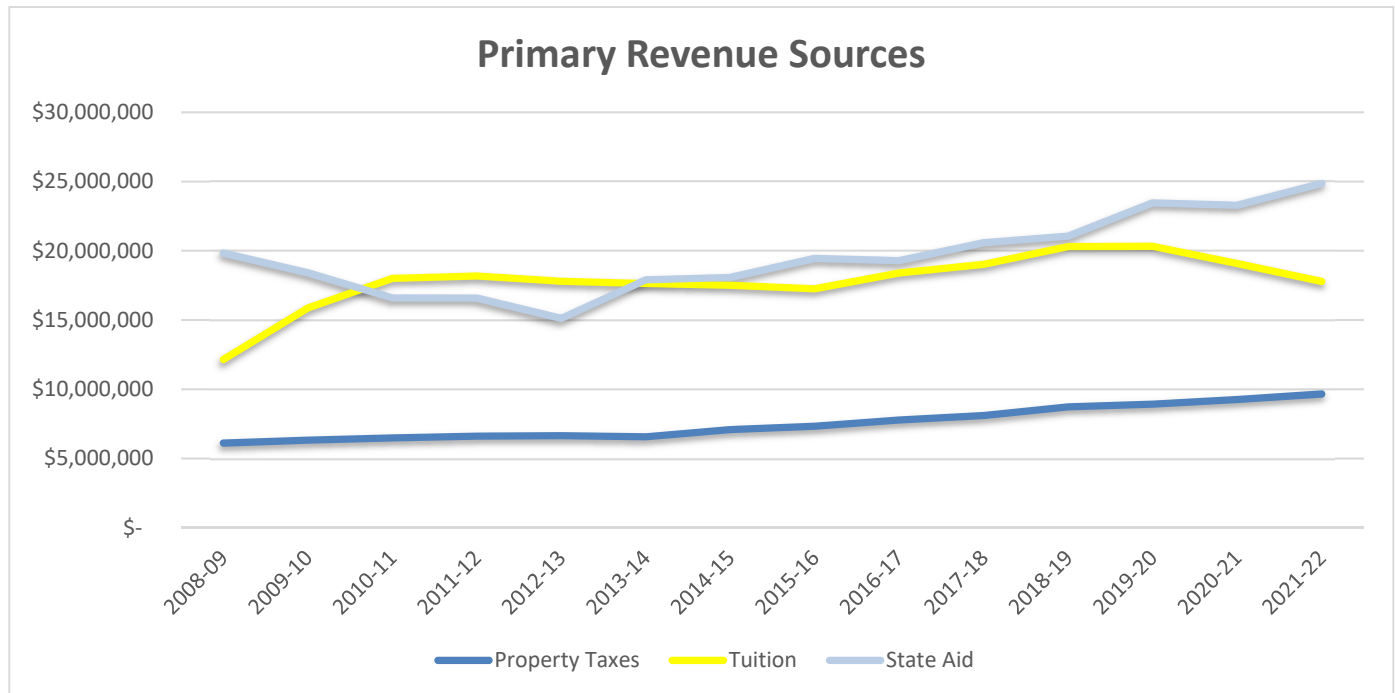


Figure 3 - 2019-20 saw state funding finally surpass the level provided ten years prior. Over this period and beyond, the relative reliance on tuition and fees has increased. Expected state funding levels for the 2021-22 year will result in state aid providing just 43% of total funding. *Projected. **Budgeted.

Property Taxes

Though steady and predictable, property taxes are subject to statutory limitations that do not allow for local government control of revenue generation. Measure 50 established permanent tax rates for all local districts and limited future growth to the lower of real market value or assessed value. Local governing boards no longer have the ability to adjust levy rates. Additionally, property tax revenue accounts for less than 20% of the operating funds for the College. Despite the impact of the pandemic, collection rates on property taxes are expected to see minimal decline in the service district.

Tuition Revenue

Enrollment

Tuition and fee revenue is based on both enrollment levels and the tuition rate set by the Board of Education. The enrollment outlook for the College in 2022-23 is an especially challenging figure to project in the current environment. Though enrollment has been trending downward at increased rates during the pandemic the coming Fall term represents the first term with limited Covid restrictions and a course schedule with more in-person options than anytime in the pandemic. One force competing against this potentially positive development is the unemployment rate. Individuals facing unemployment with limited job prospects traditionally look to the community college as a positive step forward but far-reaching impact of the pandemic has limited this response. Though the economic recovery has been unsteady and affected different populations disproportionately, the availability of jobs and shortage of workers has created opportunities for many individuals who may otherwise choose to attend college. While remaining optimistic about the phase-in of more face-to-face learning, LBCC is budgeting cautiously with an assumed decline of five percent in enrollment for next fiscal year.

Tuition Rate

Lack of state funding has created added demand on tuition revenue. As discussed, total tuition revenue is impacted by the cyclical nature of enrollment. In order to create the long-term trend of tuition support for the overall funding model the tuition rate itself must be adjusted over time. However, the tuition rate has been adjusted unevenly over time. Figure 4 illustrates a series a large increases followed by tuition freezes. This volatility is difficult for students to plan their personal finances around. The preferred model that began in 2016-17 is to trend the increases down and, ultimately, adopt an annual, incremental increase in the tuition rate going forward. The level of the annual increase is influenced by other revenue sources and any resulting budget shortfall. With that understanding, the Board of Education adopted a 4.00% increase for the 2022-23 academic year in March. This decision resumes the pattern of lower annual increases that was interrupted by the 8.00% rate increase of 2020-21; a move made in reaction to early impact of the pandemic. Though significant revenue questions remain, LBCC continues to seek a balanced solution that does not put undue burden on tuition.

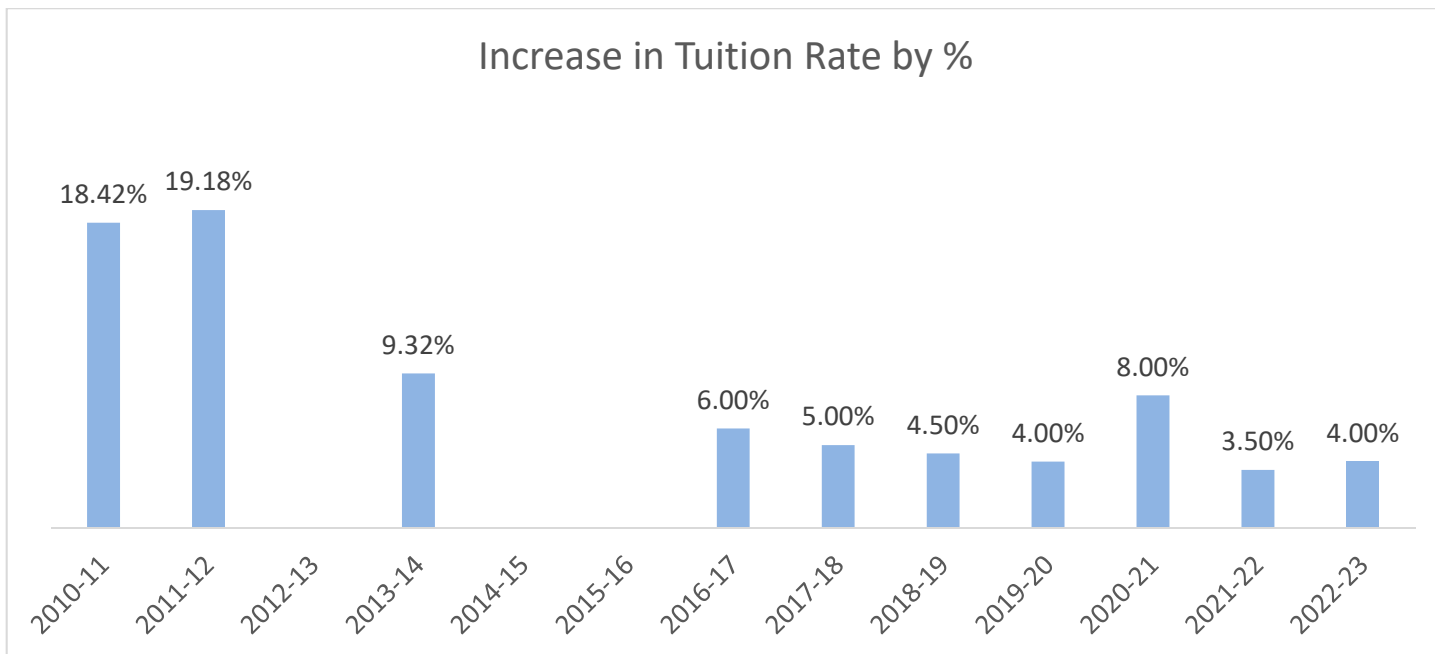


Figure 4 - The college has shifted to a model that adopts smaller, annual tuition rate increases rather than tuition freezes followed by large spikes. The blue columns represent tuition rates approved by the Board of Education while the yellow columns represent proposed/projected tuition rate increases needed to continue to desired trend of incremental increases.

Tuition increases, however, cannot come without careful consideration of student affordability. With the understanding that attending college has far-reaching financial impact on a student’s life (well beyond just the cost of tuition), the college has operationalized many direct affordability efforts. The Linn-Benton Community College Foundation has also taken an active role in generating new funds and leveraging existing monies toward affordability-related use. The college’s reliance on tuition revenue is a funding reality. However, our efforts to identify students in financial need, marshal resources for support, and deliver them in a targeted and timely manner is key to making that reality part of a sustainable model for our students and community. This effort has been made even more important given the far-reaching impact the Covid response has had on the most vulnerable populations in our communities. Affordable textbooks (Open Educational Resources), food security efforts, more progressive student account options, and the pursuit of affordable housing partnerships are just some of the efforts that have been initiated at the college.

State Appropriation

Approximately 47.5% of the college’s funding is budgeted to come from state aid as appropriated from the Community College Support Fund (CCSF). When the CCSF is determined, the amount set aside for each college is calculated by an established formula. The primary consideration in the formula is each college’s enrollment relative to all other schools. The formula calls for a three-year weighted average of that relative enrollment percentage. The formula weights the most recently completed academic year full-time enrollment figure at 40% with prior years two and three weighted at 30% each. This weighted full-time enrollment figure is then calculated as a percentage of total statewide enrollment. Thanks in large part to our enrollment and retention efforts, LBCC has seen its proportionate share of the overall support remain steady. However, substantial increase to the CCSF is vital to the sustainability of the funding model and ability to fully serve our shared mission.

As a mid-biennium year, 2022-23, will not bring a notable change in state revenue but funding levels for the coming 2023-25 biennium will be crucial. The amount provided to the CCSF is a combination of available funding from overall state revenues and the legislative decision to move those funds to community colleges. State aid is therefore largely an economic and political decision outside of our direct control. State revenue forecasts have shown a favorable future environment for increased funding and with one-time Federal relief funds being discontinued those revenues will need to be directed to the CCSF to address the growing spending deficits faced by community colleges across the state.

2022-23 Budget Challenges

The funding model outlined above provides the context behind the financial challenges addressed in this proposed 2022-23 budget. 2022-23 is a mid-biennium year which typically offers more stability in funding and financial variables. State funding is expected to remain flat with only slight formula-based adjustments affecting the college. Also, contribution rates for the mandatory Public Employees Retirement System (PERS) will not change for 2022-23. However, enrollment declines beginning from the onset of the pandemic have continued through fiscal year 2021-22 and the trend moving forward to 2022-23 is of significant concern. The proposed budget reflects an assumption of five percent enrollment decline in the coming 2022-23 year. With no mid-biennium increase to state aid this reduces revenue while expenses climb from inflationary pressures.

This budgetary reality for 2022-23 exacerbates an underlying operational deficit spending trend that has been worsening through the pandemic. Operational expense growth has outpaced operational revenue in recent years and the sharp Covid-related enrollment decline has amplified the issue. However, the availability of federal Covid-relief funds has provided temporary relief from the impact of deficit spending. Figure 5 outlines the funding that has been made available during this period.

| | CARES | CRRSA | *ARPA |
|---------------|---------------------|---------------------|----------------------|
| Institutional | \$ 1,303,338 | \$ 4,778,982 | \$ 5,310,181 |
| Students | \$ 1,303,338 | \$ 1,303,338 | \$ 5,368,451 |
| Total | \$ 2,606,676 | \$ 6,082,320 | \$ 10,750,000 |

Figure 5 – Three individual relief acts have provided funding to LBCC during the 2020-21 and 2021-22 fiscal years. CARES – Coronavirus Aid, Relief, and Economic Security Act. CRRSA – Coronavirus Response and Relief Supplemental Appropriations. ARPA – American Rescue Plan Act.

Much of the funding use has been centered on expenses associated with the remote work and learning environment and direct pandemic response needs. However, funds have also been used to replace lost revenue (tuition and fees as well as enterprise functions such as food service and bookstore) that have been realized as a result of the pandemic. This lost revenue component of the relief funds enabled an influx of revenue into the general fund and provided one-time relief to the budget model. Improving the annual surplus/deficit outcome and strengthening existing reserves (fund balance) has helped the college navigate these challenging pandemic years. However, all HEERF funds will be fully encumbered by fiscal 2021-22 year-end thereby ending the emergency relief available to supplement operating budgets.

In anticipation of this, the college has pursued an additional Covid-relief program known as the Employee Retention Credit. This program provides partial credit for payroll costs for organizations that experienced substantial impact to business operations during the pandemic. The college was made eligible for this program through an extension to the original CARES act. The net credits currently estimated for the college stand at \$6.5 million. These funds will provide continued offset to deficit spending and allow for targeted investments to promote enrollment growth.

Like HEERF funding, ERC money is one-time in nature and will prevent the college from having to take the entirety of deficit spending from fund balance. The college watches reserve levels closely to ensure the board-appointed 10% target is being considered. Figure 6 illustrates projected fund balance levels using the forward facing budget projection model.

With recognition that these one-time funding programs cannot continue indefinitely the college is beginning to plan for the possibility of substantial cost reductions. Only \$250,000 in reductions are being brought forward to the 2022-23 budget but future years would see significantly higher cost reductions phased in. The one-time ERC money will effectively “buy time” for decreases to be absorbed by college operations though some of the funds may be used for program reinvestment and opportunities to reinvigorate enrollment in targeted areas. As the college moves beyond 2022-23 it will be vital for the state to reinvest in community colleges at a level that fully supports their educational mission and addresses the impact of recent enrollment declines and expense inflation.

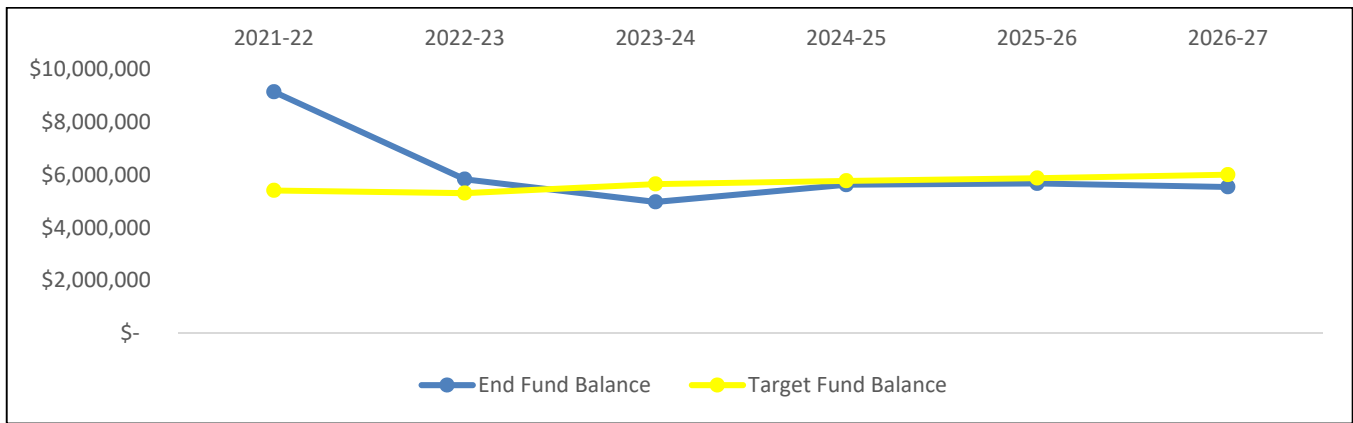


Figure 6 - The Governing Board has set a target fund balance level of 10% of annual revenue. These reserve funds can be spent down to the 10% target level as cost reductions are phased in.

Retirement Costs

One expense category of note that the college holds no direct control over is the required contribution to the Public Employees Retirement System (PERS). The college makes mandatory contributions for all eligible employees to the PERS system. These contributions represent direct expenses to the college. The contribution rates, as set by PERS, are updated at the beginning of each biennium using actuarial analysis. As 2022-23 is a mid-biennium year there are no rate increases built into the proposed budget. However, the college will be monitoring future advisory rates to ensure any projected increases are reflected in the budget projection model.

Investment Opportunities

In line with the mission-driven budget philosophy, this budget recommends the consideration of three primary avenues of investment in LBCC’s future: operational costs associated with capital projects, budget enhancements to further mission and goals, and strategic funding of new initiatives. The total for the three initiatives is \$696,485 for 2022-23. These investments will provide direct support for the College’s mission and enable continued innovation.

Capital Project Operating Costs

The budget must not only factor in the one-time costs for project construction, but the ongoing operational needs that will continue each year going forward. The projects funded through voter-approved General Obligation bonds in 2014 will have been completed by the end of fiscal year 2021-22. However, the Takena Remodel project, funded with separate financing (not General Obligation bonds), is expected to be completed in the 2022-23 budget year. The building is expected to become operational during the fiscal year but no related operational costs have been identified.

Budget Enhancements

Budget Enhancements represent expansions of the existing budget made with a specific, targeted performance in mind. They are designed to allocate resources to strategic goals. Packages likely to be funded include:

| | | |
|---------------------------------|---|----------|
| Science, Engineering, Math | 1.0 Classified instructional support in Math Cafe | \$75,000 |
| Art, Social Science, Humanities | Ongoing equipment costs for Music Production program | \$5,600 |
| Information Services | Increased software costs related to online environment | \$33,500 |
| Information Services | Single Stop software license agreement | \$28,000 |
| Information Services | Oracle licensing for cloud infrastructure | \$32,047 |
| Human Services | Applicant Tracking System upgrade for Banner connection | \$10,000 |
| Payroll | HB2005 Oregon Paid Leave Act required employer contribution | \$62,795 |
| Science, Engineering, Math | .5 Classified support position for Horse Barn | \$49,543 |

The majority of new funds are Information Services to absorb software costs as external funding (HEERF Covid relief and state grants) is no longer available to pay for needed systems. Funds are also being used to move the College's primary enterprise software system to cloud hosting services. Additionally, investments in direct Math support are being proposed to improve student success and a support position for Equine Sciences at the Horse Barn is being considered. Mandatory increases in the Oregon Paid Leave Act program are being factored in as HB2005 takes effect during the 2022-23 fiscal year. These recommendations are brought forward with the confidence that each one serves to not only further our established strategic goals, but will do so effectively, making the most use of student tuition dollars and taxpayer funds.

Strategic Initiatives

The Board of Education has committed to continued funding for Strategic Initiatives. This funding level has been increased to \$400,000 annually. Though the historic funding level has been \$500,000 this budget will allow for a strong level of continued innovation. Strategic investments are projects that are unproven but worthy of consideration for a short period of time (no more than two years) in order to be tested. Successful companies do not abandon research and development budgets in tighter financial times but consider them investments in a better future for the organization. Despite a reduced budget footprint the Board's overall commitment to this funding reflects a similarly bold approach to the future of LBCC. Examples of some of initiatives include:

- Student Employment Center – creation of a dedicated Student Employment Center to provide information, guidance, and opportunity for students to find Workstudy, Learn & Earn, and other employment opportunities on campus. These positions have historically gone under-filled (especially during the pandemic) but represent a proven retention strategy with students.

- Mental Health Services – with growing concern and demand for mental health support this initiative makes available professional mental health services by a contracted provider.

Cost Reductions

The proposed 2021-22 budget assumes cost reductions in the amount of \$250,000. This amount has been almost entirely accounted for as a result currently planned budget adjustments. No further cost reductions are expected for the 2022-23 year but the College will monitor enrollment patterns for the 2022-23 year and expected state funding levels in order to determine the scope of any reductions needed beyond the 2022-23 year. The approach taken in seeking cost reductions is consistent with the mission-based budget philosophy that does not call for across the board reductions. Instead, funds are divested according to the value each contributes to the strategic goals of the college. Any additional actions needed in future budget years will be difficult but will be made with purpose and hope that the college can come through these financial challenges stronger and more dynamic.

Summary

LBCC's resiliency and commitment to our mission is being tested like never before. However, we are confident and committed to coming through this difficult time as a stronger, even more focused institution with a sustainable financial model supporting it. This budget calls for the following:

- Targeted increases and investments that improve our operational and instructional capacity allowing us to strengthen the infrastructure required of an increasingly remote learning environment.
- Increase in tuition revenue via a 4.0% tuition rate adjustment – this proposed increase recognizes the reality of the college's funding model but balances affordability to the maximum extent possible.
- Identifying cost savings - a first phase of expense reductions of \$250,000 that improve the budget picture but have the least amount of impact on students as possible.
- Leveraging additional federal relief funding to provide improved financial standing to the overall budget.

We will continue to meet this changing environment with a hopeful, creative approach and a commitment to improve our communities through the education we provide.

Acknowledgments

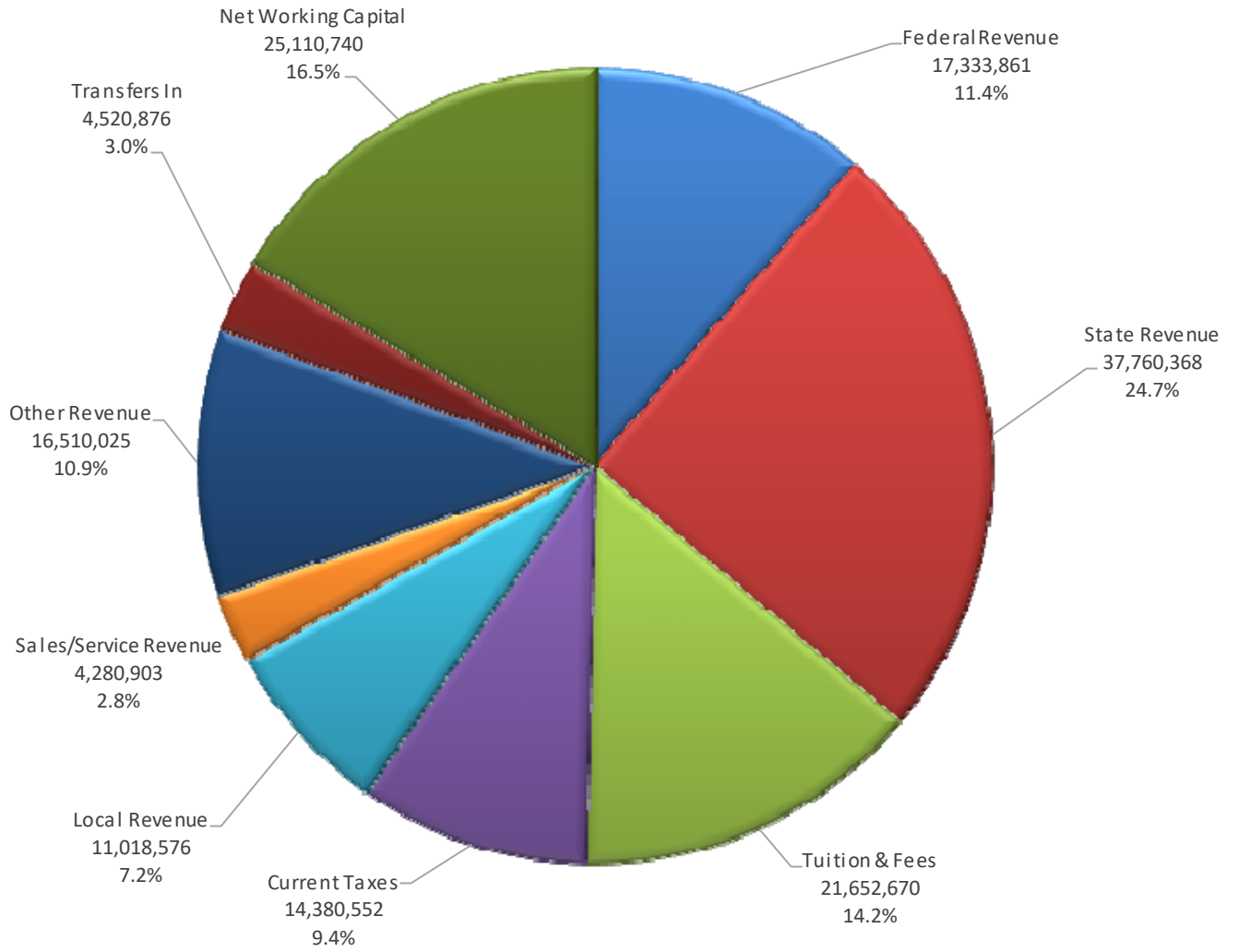
I want to extend my sincere gratitude to all faculty, academic professionals, classified employees, and the confidential and management team for their dedication, commitment, and professionalism in our shared pursuit of our mission. I would also like to extend special thanks to those who have put a considerable amount of time, energy, and effort into the development of this budget. I am grateful for the contributions of the entire college community in helping us move forward together despite the challenging and uncertain era in which we find ourselves.

Sincerely,



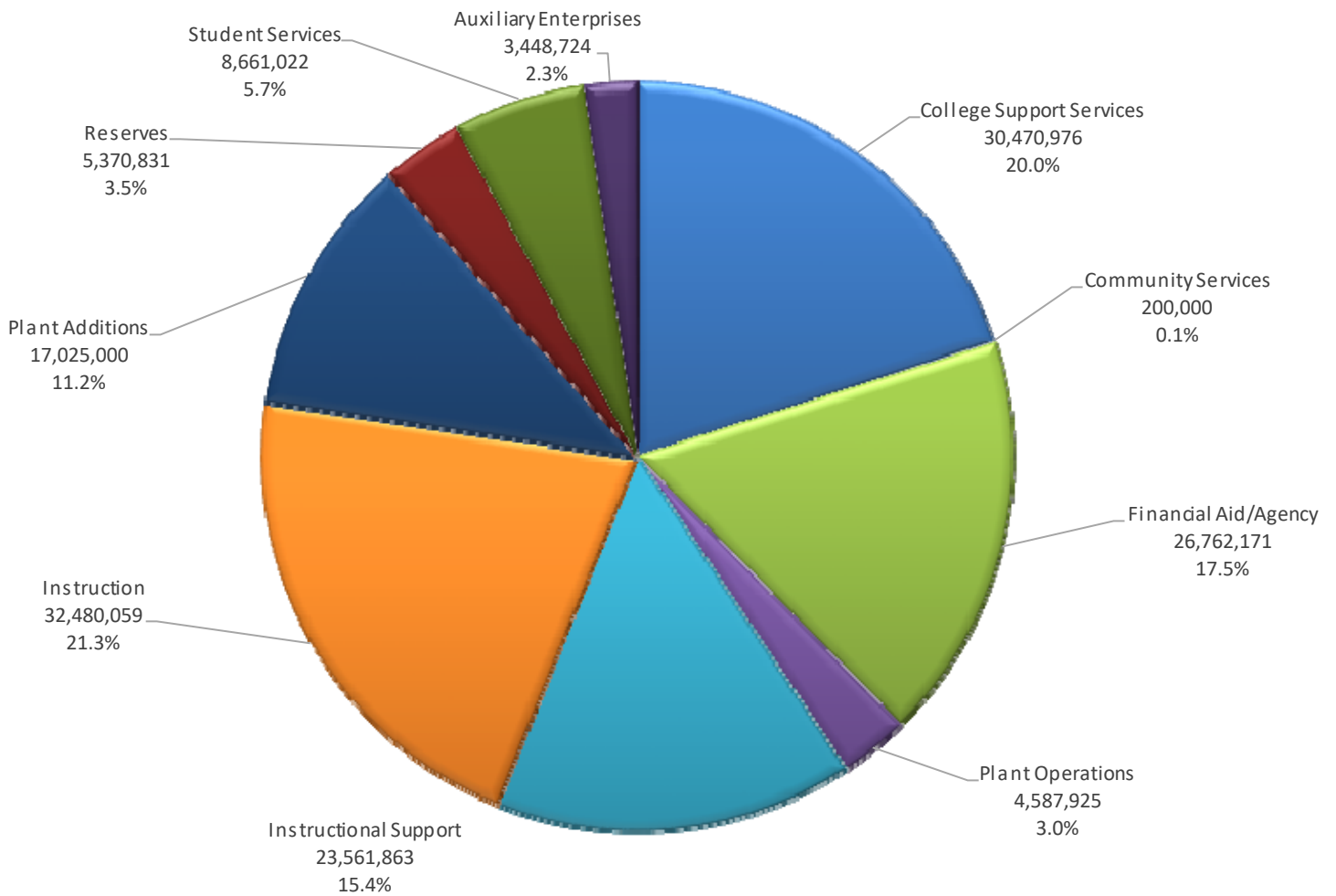
Lisa Avery - President

All Funds Resources



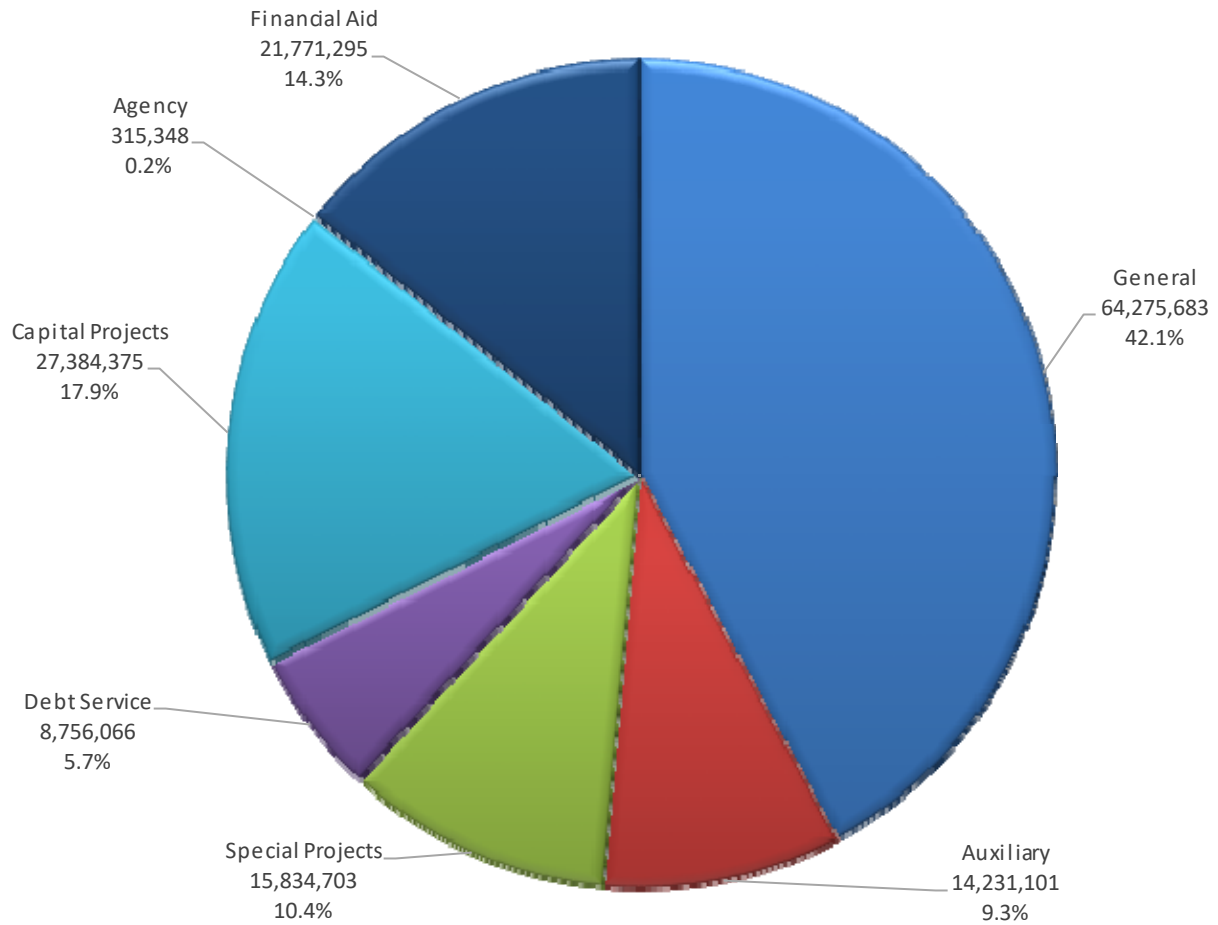
All Funds Resources by Source
\$152,568,571

All Funds Requirements by Program



Total Fund Requirements by Program
\$152,568,571 Including Reserves

All Funds Requirements by Fund



Total Requirements by Fund
\$152,568,571

Comparison of 2021-22 Adopted Budget to 2022-23 Adopted Budget Resources

| FUND | RESOURCES CATEGORY | RESOURCES | | | |
|-----------------------------|---------------------------------|-----------------------------------|----------------------|-----------------------|-----------------------|
| | | ADOPTED & CHANGES 2021-2022 | ADOPTED 2022-2023 | DOLLAR CHANGE | PERCENT CHANGE |
| GENERAL | Net Working Capital (Carryover) | \$ 11,298,903 | \$ 9,151,110 | \$ (2,147,793) | -19.01% |
| | State Revenue | 24,945,751 | 24,767,790 | (177,961) | -0.71% |
| | Local Revenue | 30,330,252 | 27,610,058 | (2,720,194) | -8.97% |
| | Other Revenue | 523,418 | 471,725 | (51,693) | -9.88% |
| | Transfers In | 150,000 | 2,275,000 | 2,125,000 | 1416.67% |
| | TOTAL | | <u>\$ 67,248,324</u> | <u>\$ 64,275,683</u> | <u>\$ (2,972,641)</u> |
| AUXILIARY | Net Working Capital (Carryover) | \$ 2,281,184 | \$ 3,069,410 | \$ 788,226 | 34.55% |
| | State Revenue | 120,792 | 108,772 | (12,020) | -9.95% |
| | Local Revenue | 6,391,919 | 6,733,716 | 341,797 | 5.35% |
| | Sales/Service Revenue | 5,236,525 | 4,280,903 | (955,622) | -18.25% |
| | Other Revenue | 42,400 | 38,300 | (4,100) | -9.67% |
| | Transfers In | 0 | 0 | 0 | 0.00% |
| TOTAL | | <u>\$ 14,072,820</u> | <u>\$ 14,231,101</u> | <u>\$ 158,281</u> | <u>1.12%</u> |
| SPECIAL PROJECTS | Net Working Capital (Carryover) | \$ 1,177,801 | \$ 2,452,576 | \$ 1,274,775 | 108.23% |
| | Federal Revenue | 15,060,716 | 5,792,549 | (9,268,167) | -61.54% |
| | State Revenue | 3,313,113 | 4,377,806 | 1,064,693 | 32.14% |
| | Local Revenue | 3,371,504 | 3,211,772 | (159,732) | -4.74% |
| TOTAL | | <u>\$ 22,923,134</u> | <u>\$ 15,834,703</u> | <u>\$ (7,088,431)</u> | <u>-30.92%</u> |
| CAPITAL PROJECTS | Net Working Capital (Carryover) | \$ 14,305,450 | \$ 10,275,450 | \$ (4,030,000) | -28.17% |
| | State Revenue | 0 | 0 | 0 | 0.00% |
| | Local Revenue | 52,500 | 20,500 | (32,000) | -60.95% |
| | Other Revenue | 0 | 16,000,000 | 16,000,000 | 100.00% |
| | Transfers In | 966,645 | 1,088,425 | 121,780 | 12.60% |
| TOTAL | | <u>\$ 15,324,595</u> | <u>\$ 27,384,375</u> | <u>\$ 12,059,780</u> | <u>78.70%</u> |
| DEBT SERVICE | Local Revenue | \$ 6,160,813 | \$ 7,679,098 | \$ 1,518,285 | 24.64% |
| | Transfers In | 1,079,318 | 1,076,968 | (2,350) | -0.22% |
| TOTAL | | <u>\$ 7,240,131</u> | <u>\$ 8,756,066</u> | <u>\$ 1,515,935</u> | <u>20.94%</u> |

Comparison of 2021-22 Adopted Budget to 2022-23 Adopted Budget Resources

| FUND | RESOURCES CATEGORY | RESOURCES | | | |
|----------------------------------|---------------------------------|-----------------------------------|-----------------------|---------------------|-------------------|
| | | ADOPTED & CHANGES 2021-2022 | ADOPTED 2022-2023 | DOLLAR CHANGE | PERCENT CHANGE |
| FINANCIAL AID | Net Working Capital (Carryover) | \$ 52,500 | \$ 42,500 | \$ (10,000) | -19.05% |
| | Federal Revenue | 11,541,312 | 11,541,312 | 0 | 0.00% |
| | State Revenue | 8,506,000 | 8,506,000 | 0 | 0.00% |
| | Local Revenue | 1,578,500 | 1,601,000 | 22,500 | 1.43% |
| | Transfers In | 227,733 | 80,483 | (147,250) | -64.66% |
| | TOTAL | \$ 21,906,045 | \$ 21,771,295 | \$ (134,750) | -0.62% |
| AGENCIES/ CLUBS | Net Working Capital (Carryover) | \$ 206,831 | \$ 119,694 | \$ (87,137) | -42.13% |
| | Local Revenue | 195,580 | 195,654 | 74 | 0.04% |
| | Sales/Service Revenue | 0 | 0 | 0 | 0.00% |
| | Transfers In | 150,236 | 0 | (150,236) | -100.00% |
| | TOTAL | \$ 552,647 | \$ 315,348 | \$ (237,299) | -42.94% |
| TOTAL RESOURCES-ALL FUNDS | | \$ 149,267,696 | \$ 152,568,571 | \$ 3,300,875 | 2.21% |

Comparison of 2021-22 Adopted Budget to 2022-23 Proposed Budget Requirements

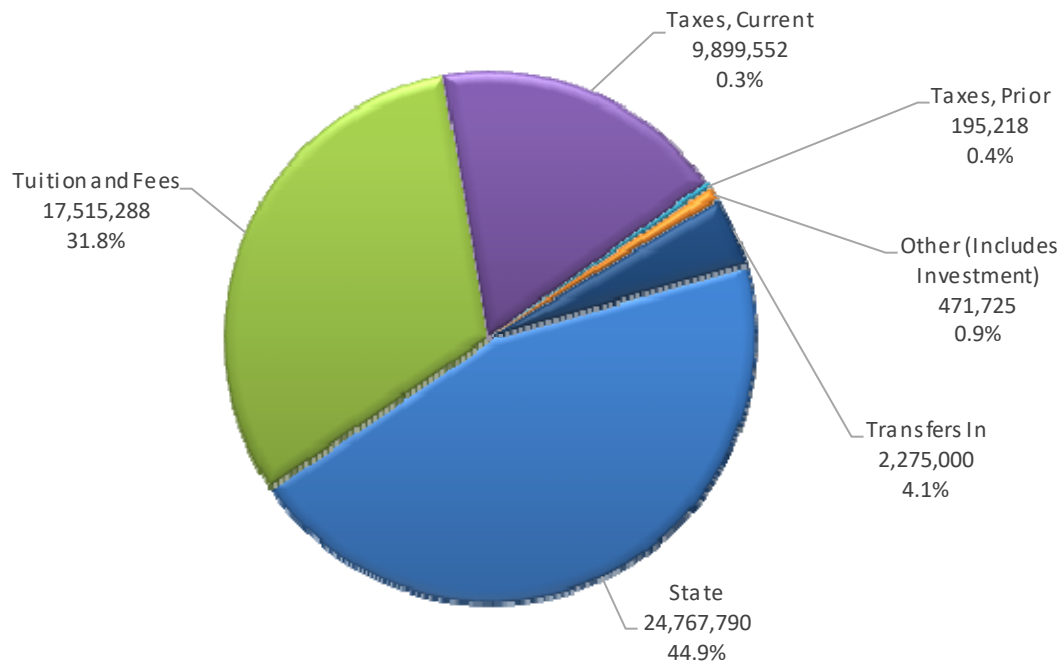
| REQUIREMENTS | | | | | | | |
|-----------------------------|--------------------------|-----------------------------------|----------------|----------------------|----------------|-----------------------|-------------------|
| FUND | PROGRAM CATEGORY | ADOPTED & CHANGES 2021-2022 | FTE | ADOPTED 2022-2023 | FTE | DOLLAR CHANGE | PERCENT CHANGE |
| GENERAL | Instruction | \$ 23,662,947 | 223.867 | \$ 24,486,604 | 217.572 | \$ 823,657 | 3.48% |
| | Instructional Support | 11,590,760 | 118.863 | 12,011,552 | 120.987 | 420,792 | 3.63% |
| | Student Services | 5,895,915 | 62.837 | 6,034,853 | 58.375 | 138,938 | 2.36% |
| | College Support Services | 11,587,477 | 81.251 | 11,241,133 | 77.258 | (346,344) | -2.99% |
| | Plant Operations | 3,110,648 | 12.260 | 3,326,175 | 13.234 | 215,527 | 6.93% |
| | Financial Aid/Agency | 2,191,316 | n/a | 2,180,011 | n/a | (11,305) | -0.52% |
| | Reserves | 9,209,261 | n/a | 4,995,355 | n/a | (4,213,906) | -45.76% |
| | TOTAL | \$ 67,248,324 | 499.078 | \$ 64,275,683 | 487.426 | \$ (2,972,641) | -4.42% |
| AUXILIARY | Instruction | \$ 4,249,279 | 24.643 | \$ 4,262,936 | 23.166 | \$ 13,657 | 0.32% |
| | Instructional Support | 2,765,968 | 28.718 | 3,038,161 | 25.265 | 272,193 | 9.84% |
| | Student Services | 1,048,130 | 3.601 | 1,564,105 | 8.004 | 515,975 | 49.23% |
| | Community Services | 200,000 | n/a | 200,000 | n/a | 0 | 0.00% |
| | College Support Services | 1,151,485 | 1.000 | 1,094,105 | 1.000 | (57,380) | -4.98% |
| | Plant Operations | 18,000 | n/a | 18,000 | n/a | 0 | 0.00% |
| | Plant Additions | 25,000 | n/a | 25,000 | n/a | 0 | 0.00% |
| | Financial Aid/Agency | 208,985 | n/a | 340,690 | n/a | 131,705 | 63.02% |
| | Auxiliary Enterprises | 4,122,023 | 15.706 | 3,448,724 | 13.973 | (673,299) | -16.33% |
| | Reserves | 283,950 | n/a | 239,380 | n/a | (44,570) | -15.70% |
| | TOTAL | \$ 14,072,820 | 73.668 | \$ 14,231,101 | 71.408 | \$ 158,281 | 1.12% |
| SPECIAL PROJECTS | Instruction | \$ 2,934,273 | 30.928 | \$ 3,725,069 | 33.121 | \$ 790,796 | 26.95% |
| | Instructional Support | 6,314,733 | 12.644 | 7,860,196 | 19.376 | 1,545,463 | 24.47% |
| | Student Services | 854,489 | 4.818 | 748,917 | 4.817 | (105,572) | -12.35% |
| | College Support Services | 7,157,150 | 20.358 | 2,866,626 | 9.278 | (4,290,524) | -59.95% |
| | Financial Aid/Agency | 5,528,594 | n/a | 500,000 | n/a | (5,028,594) | -90.96% |
| | Reserves | 133,895 | n/a | 133,895 | n/a | 0 | 0.00% |
| | TOTAL | \$ 22,923,134 | 68.748 | \$ 15,834,703 | 66.592 | \$ (7,088,431) | -30.92% |

Comparison of 2021-22 Adopted Budget to 2022-23 Proposed Budget Requirements

| REQUIREMENTS | | | | | | | |
|-------------------------------------|--------------------------|-----------------------------------|----------------------|-----------------------|----------------------|---------------------|-------------------|
| FUND | PROGRAM CATEGORY | ADOPTED & CHANGES 2021-2022 | FTE | ADOPTED 2022-2023 | FTE | DOLLAR CHANGE | PERCENT CHANGE |
| CAPITAL PROJECTS | Instruction | \$ 5,450 | n/a | \$ 5,450 | n/a | 0 | 0.00% |
| | Instructional Support | 52,000 | n/a | 651,954 | 5.250 | 599,954 | 1153.76% |
| | College Support Services | 2,045,000 | n/a | 6,503,046 | n/a | 4,458,046 | 218.00% |
| | Plant Operations | 1,093,750 | n/a | 1,243,750 | n/a | 150,000 | 13.71% |
| | Plant Additions | 12,120,000 | n/a | 17,000,000 | n/a | 4,880,000 | 40.26% |
| | Financial Aid/Agency | 8,395 | n/a | 1,980,175 | n/a | 1,971,780 | 23487.55% |
| | TOTAL | | <u>\$ 15,324,595</u> | <u>n/a</u> | <u>\$ 27,384,375</u> | <u>5.250</u> | <u>12,059,780</u> |
| DEBT SERVICE | College Support Services | \$ 7,240,131 | n/a | \$ 8,756,066 | n/a | \$ 1,515,935 | 20.94% |
| | TOTAL | <u>\$ 7,240,131</u> | <u>n/a</u> | <u>\$ 8,756,066</u> | <u>n/a</u> | <u>\$ 1,515,935</u> | <u>20.94%</u> |
| FINANCIAL AID | College Support Services | \$ 15,000 | n/a | \$ 10,000 | n/a | \$ (5,000) | -33.33% |
| | Financial Aid/Agency | 21,891,045 | 10.494 | 21,761,295 | 9.263 | (129,750) | -0.59% |
| | TOTAL | <u>\$ 21,906,045</u> | <u>10.494</u> | <u>\$ 21,771,295</u> | <u>9.263</u> | <u>\$ (134,750)</u> | <u>-0.62%</u> |
| AGENCIES/ CLUBS | Instructional Support | \$ 3,200 | n/a | \$ 0 | n/a | \$ (3,200) | -100.00% |
| | Student Services | 361,010 | 0.298 | 313,147 | 0.266 | (47,863) | -13.26% |
| | Community Services | 0 | n/a | 0 | n/a | 0 | 0.00% |
| | Financial Aid/Agency | 150,236 | n/a | 0 | n/a | (150,236) | -100.00% |
| | Reserves | 38,201 | n/a | 2,201 | n/a | (36,000) | -94.24% |
| | TOTAL | <u>\$ 552,647</u> | <u>0.298</u> | <u>\$ 315,348</u> | <u>0.266</u> | <u>\$ (237,299)</u> | <u>-42.94%</u> |
| TOTAL REQUIREMENTS-ALL FUNDS | | <u>\$ 149,267,696</u> | <u>652.286</u> | <u>\$ 152,568,571</u> | <u>634.955</u> | <u>\$ 3,300,875</u> | <u>\$ 2.21%</u> |

General Fund Summary of Resources

| | ACTUAL 2019-2020 | ACTUAL 2020-2021 | CURRENT BUDGET 2021-2022 | ADOPTED BUDGET 2022-2023 |
|---------------------------------|---------------------|----------------------|--------------------------------|--------------------------------|
| State | \$ 23,455,946 | \$ 23,290,089 | \$ 24,945,751 | \$ 24,767,790 |
| Federal | 0 | 3,083,379 | 0 | 0 |
| Tuition and Fees | 20,322,823 | 19,080,698 | 20,549,609 | 17,515,288 |
| Taxes, Current | 8,780,418 | 9,102,375 | 9,591,500 | 9,899,552 |
| Taxes, Prior | 147,460 | 161,682 | 189,143 | 195,218 |
| Other (Includes Investment) | 765,380 | 1,080,624 | 523,418 | 471,725 |
| Transfers In | 150,000 | 297,401 | 150,000 | 2,275,000 |
| Sub-Total Revenue | 53,622,027 | 56,096,248 | 55,949,421 | 55,124,573 |
| Net Working Capital (Carryover) | 6,783,939 | 6,746,067 | 11,298,903 | 9,151,110 |
| TOTAL RESOURCES | 60,405,966 | \$ 62,842,315 | \$ 67,248,324 | \$ 64,275,683 |



General Fund

Summary of Resources

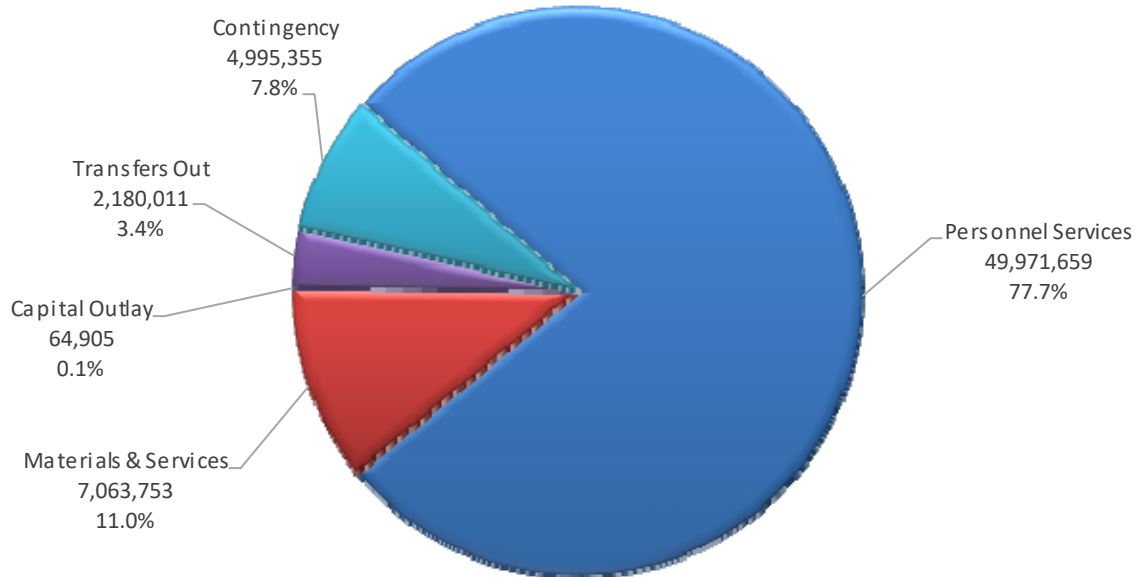
| ACCOUNT NUMBER AND NAME | ACTUAL | ACTUAL | CURRENT | PROPOSED | APPROVED | ADOPTED |
|---|-------------------|-------------------|---------------------|---------------------|---------------------|---------------------|
| | 2019-2020 | 2020-2021 | BUDGET 2021-2022 | BUDGET 2022-2023 | BUDGET 2022-2023 | BUDGET 2022-2023 |
| 01110 Taxes, Current | 8,780,418 | 9,102,375 | 9,591,500 | 9,899,552 | 9,899,552 | 9,899,552 |
| 01120 Taxes, Prior | 147,460 | 161,682 | 189,143 | 195,218 | 195,218 | 195,218 |
| 012XX Tuition and Fees | 20,322,823 | 19,080,698 | 20,549,609 | 17,515,288 | 17,515,288 | 17,515,288 |
| 014XX Interest from All Sources | 302,425 | 118,870 | 236,418 | 61,225 | 61,225 | 61,225 |
| 0165X Admissions Application Fees | 40,558 | 2,356 | 0 | 0 | 0 | 0 |
| 016XX Testing Fees | 5,120 | 325 | 0 | 0 | 0 | 0 |
| 01730 Facility Rental Fees | 10,994 | 4,782 | 10,000 | 10,000 | 10,000 | 10,000 |
| 01745 Telecomm. Equipment Rental | 27,000 | 27,000 | 0 | 0 | 0 | 0 |
| 01785 Indirect Cost/Admin. Allow. Rev. | 304,717 | 871,138 | 200,000 | 350,000 | 350,000 | 350,000 |
| 04210 State Reimbursement | 23,455,946 | 23,290,089 | 24,945,751 | 24,767,790 | 24,767,790 | 24,767,790 |
| 5310 Federal Grants | 0 | 3,083,379 | 0 | 0 | 0 | 0 |
| 0XXXX Miscellaneous--Other Revenue | 74,566 | 56,153 | 77,000 | 50,500 | 50,500 | 50,500 |
| 80200 Transfer In--From Auxiliary Fund | 150,000 | 297,401 | 150,000 | 275,000 | 275,000 | 275,000 |
| 80300 Transfer In--From Special Proj Fund | 0 | 0 | 0 | 0 | 0 | 0 |
| 80600 Transfer In--From Plant Fund | 0 | 0 | 0 | 2,000,000 | 2,000,000 | 2,000,000 |
| 09999 Net Working Capital | 0 | 0 | 11,298,903 | 9,151,110 | 9,151,110 | 9,151,110 |
| TOTAL RESOURCES | 53,622,027 | 56,096,248 | 67,248,324 | 64,275,683 | 64,275,683 | 64,275,683 |

Notes to 2022-2023 Budget Year

- Net Working Capital – Actual is based on prior year ending balance. Budget year columns are Board directed.
- State – Based on latest estimates provided by the Department of Community Colleges and Workforce Development.
- Tuition & Fees – 2022-23 General Fund tuition is set at \$131.90 per credit and an additional differential tuition of 21% for selected classes.
- Taxes, Current – Net levy tax collections at 95% plus offsets: assumes 4.5% growth over projected FY21-22.
- Taxes, Prior – Taxes collected for prior year assessments.
- Transfers In – Includes overhead East Linn Center.

General Fund Summary of Requirements

| | <u>ACTUAL</u> <u>2019-2020</u> | <u>ACTUAL</u> <u>2020-2021</u> | <u>CURRENT</u> <u>BUDGET</u> <u>2021-2022</u> | <u>ADOPTED</u> <u>BUDGET</u> <u>2022-2023</u> |
|------------------------------------|-----------------------------------|-----------------------------------|---|---|
| Personnel Services | \$ 46,272,383 | \$ 45,883,651 | \$ 49,008,138 | \$ 49,971,659 |
| Materials & Services | 5,680,450 | 4,891,689 | 6,774,704 | 7,063,753 |
| Capital Outlay | 80,750 | 111,656 | 64,905 | 64,905 |
| Transfers Out | <u>1,626,316</u> | <u>1,607,891</u> | <u>2,191,316</u> | <u>2,180,011</u> |
| Sub-Total Expenditures | 53,659,899 | 52,494,887 | 58,039,063 | 59,280,328 |
| Contingency | 0 | 0 | 9,209,261 | 4,995,355 |
| Unappropriated Ending Fund Balance | <u>6,746,067</u> | <u>10,347,428</u> | <u>0</u> | <u>0</u> |
| TOTAL REQUIREMENTS | <u>\$ 60,405,966</u> | <u>\$ 62,842,315</u> | <u>\$ 67,248,324</u> | <u>\$ 64,275,683</u> |



General Fund Summary by Use

| ACCOUNT | INSTRUCTION | INST. SUPPORT | STUDENT SERVICES | COMMUNITY SERVICES | COLLEGE SUPPORT | PLANT OPERATIONS | PLANT ADDITIONS | FINANCIAL AID/AGENCY | RESERVES | TOTAL |
|----------------------|-------------------|-------------------|---------------------|-----------------------|--------------------|---------------------|--------------------|-------------------------|------------------|-------------------|
| PERSONNEL EXPENSES | 15,743,492 | 7,324,979 | 3,539,546 | 0 | 5,022,261 | 811,825 | 0 | 0 | 0 | 32,442,103 |
| BENEFIT EXPENSES | 7,913,416 | 3,895,471 | 2,019,646 | 0 | 3,187,305 | 513,718 | 0 | 0 | 0 | 17,529,556 |
| MATERIALS & SERVICES | 829,696 | 741,197 | 445,661 | 0 | 3,016,567 | 2,000,632 | 0 | 0 | 0 | 7,033,753 |
| FINANCIAL AID | 0 | 0 | 30,000 | 0 | 0 | 0 | 0 | 18,043 | 0 | 48,043 |
| CAPITAL OUTLAY | 0 | 49,905 | 0 | 0 | 15,000 | 0 | 0 | 0 | 0 | 64,905 |
| CONTINGENCY EXPENSE | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 4,995,355 | 4,995,355 |
| TRANSFERS OUT | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2,161,968 | 0 | 2,161,968 |
| | <u>24,486,604</u> | <u>12,011,552</u> | <u>6,034,853</u> | <u>0</u> | <u>11,241,133</u> | <u>3,326,175</u> | <u>0</u> | <u>2,180,011</u> | <u>4,995,355</u> | <u>64,275,683</u> |

Notes to 2022-2023 Budget Year

- Personnel Expenses – Includes salary and benefit expense.
- Materials and Services – Includes materials, supplies, printing, utilities, contract services and other services.
- Capital Outlay – Building construction and equipment with a unit cost of \$5,000 or more and a useful life of one year or more.
- Transfers Out – Transfer to other funds.
 - Roof Reserves - \$200,000
 - Major Maintenance Reserve - \$355,000
 - Technology Reserve - \$500,000
 - General Equipment Reserve - \$30,000
 - Debt Service - \$1,076,968
- Contingency – Amount set aside for the upcoming year, including budgeted ending fund balance.

General Fund

Requirements by Major Program

| PROGRAM TYPE | ACTUAL | | CURRENT | FTE | PROPOSED | | APPROVED | ADOPTED | FTE |
|---|-------------------|-------------------|-------------------|----------------|-------------------|----------------|-------------------|-------------------|----------------|
| | 2019-2020 | 2020-2021 | BUDGET 2021-2022 | | BUDGET 2022-2023 | FTE | BUDGET 2022-2023 | BUDGET 2022-2023 | |
| 10000 INSTRUCTION | | | | | | | | | |
| Personnel Services | 23,148,777 | 23,091,280 | 22,850,209 | 223.867 | 23,656,908 | 217.572 | 23,656,908 | 23,656,908 | 217.572 |
| Materials & Services | 605,835 | 500,992 | 812,738 | n/a | 808,338 | n/a | 808,338 | 829,696 | n/a |
| Capital Outlay | 0 | 56,900 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Transfers Out | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 23,754,612 | 23,649,172 | 23,662,947 | 223.867 | 24,465,246 | 217.572 | 24,465,246 | 24,486,604 | 217.572 |
| 20000 INSTRUCTIONAL SUPPORT | | | | | | | | | |
| Personnel Services | 8,637,602 | 8,817,572 | 10,800,166 | 118.863 | 11,220,450 | 120.987 | 11,220,450 | 11,220,450 | 120.987 |
| Materials & Services | 404,722 | 293,762 | 740,689 | n/a | 741,197 | n/a | 741,197 | 741,197 | n/a |
| Capital Outlay | 48,488 | 49,756 | 49,905 | n/a | 49,905 | n/a | 49,905 | 49,905 | n/a |
| Transfers Out | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 9,090,812 | 9,161,090 | 11,590,760 | 118.863 | 12,011,552 | 120.987 | 12,011,552 | 12,011,552 | 120.987 |
| 30000 STUDENT SERVICES | | | | | | | | | |
| Personnel Services | 5,359,853 | 5,124,145 | 5,453,261 | 62.837 | 5,559,192 | 58.375 | 5,559,192 | 5,559,192 | 58.375 |
| Materials & Services | 361,961 | 183,206 | 442,654 | n/a | 475,661 | n/a | 475,661 | 475,661 | n/a |
| Capital Outlay | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Transfers Out | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 5,721,814 | 5,307,351 | 5,895,915 | 62.837 | 6,034,853 | 58.375 | 6,034,853 | 6,034,853 | 58.375 |
| 50000 COLLEGE SUPPORT SERVICES | | | | | | | | | |
| Personnel Services | 8,064,740 | 7,723,220 | 8,753,599 | 81.251 | 8,209,566 | 77.258 | 8,209,566 | 8,209,566 | 77.258 |
| Materials & Services | 2,582,834 | 2,073,004 | 2,818,878 | n/a | 3,012,578 | n/a | 3,012,578 | 3,016,567 | n/a |
| Capital Outlay | 32,262 | 0 | 15,000 | n/a | 15,000 | n/a | 15,000 | 15,000 | n/a |
| Transfers Out | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 10,679,836 | 9,796,224 | 11,587,477 | 81.251 | 11,237,144 | 77.258 | 11,237,144 | 11,241,133 | 77.258 |
| 60000 PLANT OPERATIONS/MAINTENANCE | | | | | | | | | |
| Personnel Services | 1,061,411 | 1,127,434 | 1,150,903 | 12.260 | 1,325,543 | 13.234 | 1,325,543 | 1,325,543 | 13.234 |
| Materials & Services | 1,725,098 | 1,840,725 | 1,959,745 | n/a | 2,000,632 | n/a | 2,000,632 | 2,000,632 | n/a |
| Capital Outlay | 0 | 5,000 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Transfers Out | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 2,786,509 | 2,973,159 | 3,110,648 | 12.260 | 3,326,175 | 13.234 | 3,326,175 | 3,326,175 | 13.234 |
| 75000 TRANSFERS | | | | | | | | | |
| Personnel Services | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Materials & Services | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Capital Outlay | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Transfers Out | 1,626,316 | 1,607,891 | 2,191,316 | n/a | 2,180,011 | n/a | 2,180,011 | 2,180,011 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 1,626,316 | 1,607,891 | 2,191,316 | n/a | 2,180,011 | n/a | 2,180,011 | 2,180,011 | n/a |

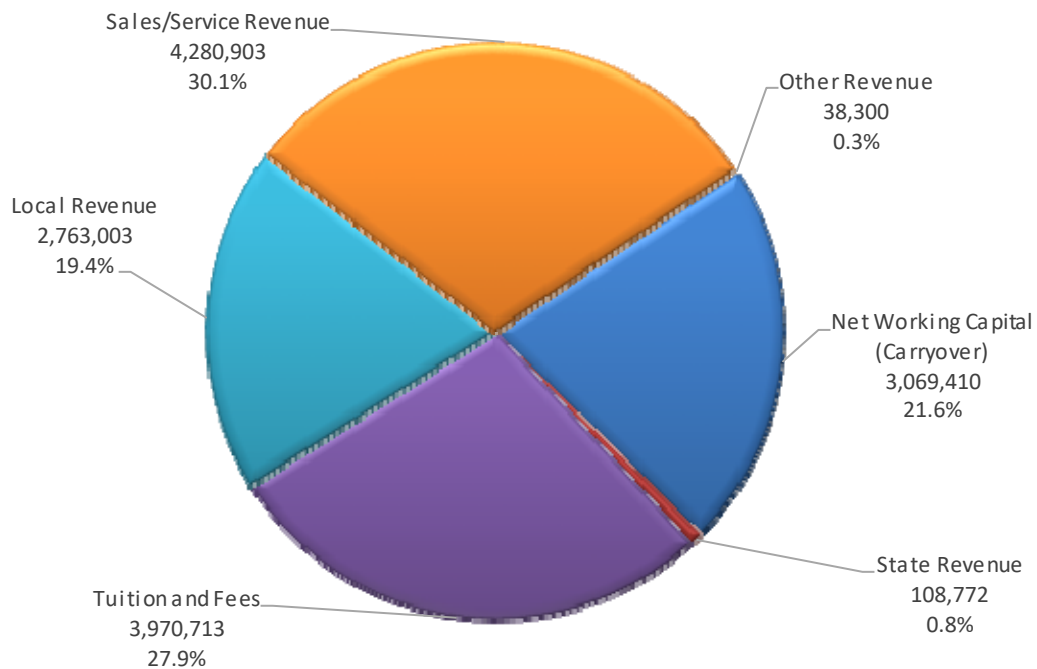
General Fund

Requirements by Major Program

| PROGRAMTYPE | ACTUAL | ACTUAL | CURRENT | | PROPOSED | | APPROVED | ADOPTED | |
|-------------------------------------|-------------------|-------------------|-------------------|----------------|-------------------|----------------|-------------------|-------------------|----------------|
| | 2019-2020 | 2020-2021 | BUDGET | FTE | BUDGET | FTE | BUDGET | BUDGET | FTE |
| 90000 RESERVES (CONTINGENCY) | | | | | | | | | |
| Personnel Services | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Materials & Services | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Capital Outlay | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Transfers Out | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 9,209,261 | n/a | 5,020,702 | n/a | 5,020,702 | 4,995,355 | n/a |
| Total Program Requirements | 0 | 0 | 9,209,261 | n/a | 5,020,702 | n/a | 5,020,702 | 4,995,355 | n/a |
| TOTAL REQUIREMENTS | | | | | | | | | |
| Personnel Services | 46,272,383 | 45,883,651 | 49,008,138 | 499.078 | 49,971,659 | 487.426 | 49,971,659 | 49,971,659 | 487.426 |
| Materials & Services | 5,680,450 | 4,891,689 | 6,774,704 | n/a | 7,038,406 | n/a | 7,038,406 | 7,063,753 | n/a |
| Capital Outlay | 80,750 | 111,656 | 64,905 | n/a | 64,905 | n/a | 64,905 | 64,905 | n/a |
| Transfers Out | 1,626,316 | 1,607,891 | 2,191,316 | n/a | 2,180,011 | n/a | 2,180,011 | 2,180,011 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 9,209,261 | n/a | 5,020,702 | n/a | 5,020,702 | 4,995,355 | n/a |
| TOTAL PROGRAM REQUIREMENTS | 53,659,899 | 52,494,887 | 67,248,324 | 499.078 | 64,275,683 | 487.426 | 64,275,683 | 64,275,683 | 487.426 |

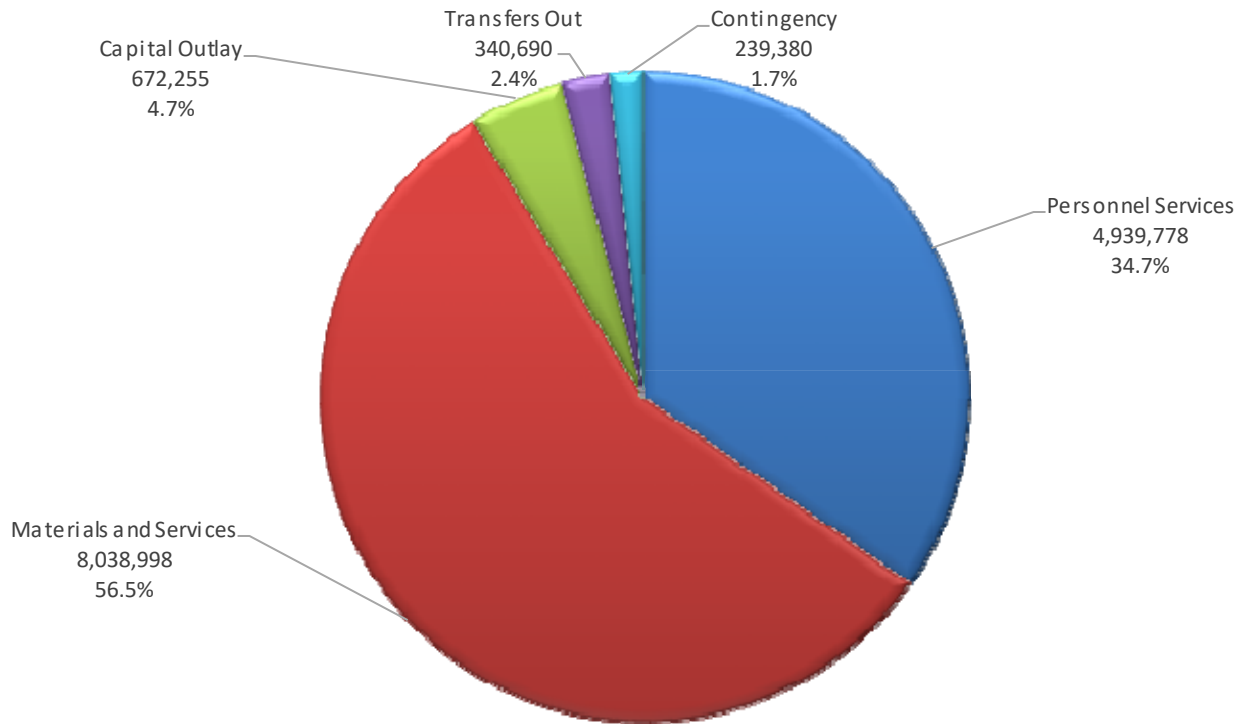
Auxiliary Fund Summary of Resources

| | ACTUAL 2019-2020 | ACTUAL 2020-2021 | CURRENT BUDGET 2021-2022 | ADOPTED BUDGET 2022-2023 |
|---------------------------------|---------------------|---------------------|--------------------------------|--------------------------------|
| Net Working Capital (Carryover) | \$ 3,502,100 | \$ 3,797,730 | \$ 2,281,184 | \$ 3,069,410 |
| State Revenue | 105,355 | 117,064 | 120,792 | 108,772 |
| Federal Revenue | 0 | 470,964 | 0 | 0 |
| Tuition and Fees | 2,956,941 | 2,124,758 | 6,391,919 | 3,970,713 |
| Local Revenue | 1,131,903 | 1,760,702 | 0 | 2,763,003 |
| Sales/Service Revenue | 455,572 | 1,217,712 | 5,236,525 | 4,280,903 |
| Other Revenue | 28,604 | 63,560 | 42,400 | 38,300 |
| Transfers In | 150,000 | 0 | 0 | 0 |
| TOTAL RESOURCES | \$ 8,330,475 | \$ 9,552,490 | \$ 14,072,820 | \$ 14,231,101 |



Auxiliary Fund Summary of Requirements

| | ACTUAL 2019-2020 | ACTUAL 2020-2021 | CURRENT BUDGET 2021-2022 | ADOPTED BUDGET 2022-2023 |
|------------------------------------|---------------------|---------------------|--------------------------------|--------------------------------|
| Personnel Services | \$ 2,028,943 | \$ 2,303,009 | \$ 4,729,182 | \$ 4,939,778 |
| Materials and Services | 2,288,360 | 2,514,962 | 8,152,909 | 8,038,998 |
| Capital Outlay | 12,737 | 32,095 | 697,794 | 672,255 |
| Transfers Out | 202,705 | 336,565 | 208,985 | 340,690 |
| Contingency | 0 | 0 | 283,950 | 239,380 |
| <i>Sub-Total</i> | 4,532,745 | 5,186,631 | 14,072,820 | 14,231,101 |
| Unappropriated Ending Fund Balance | 3,797,730 | 4,365,859 | 0 | 0 |
| TOTAL REQUIREMENTS | \$ 8,330,475 | \$ 9,552,490 | \$ 14,072,820 | \$ 14,231,101 |



Auxiliary Fund Summary by Use

| ACCOUNT | INSTRUCTION | INST. SUPPORT | STUDENT SERVICES | COMMUNITY SERVICES | COLLEGE SUPPORT | PLANT OPERATIONS | PLANT ADDITIONS | FINANCIAL AID/AGENCY | RESERVES | TOTAL |
|----------------------|-------------|---------------|------------------|--------------------|-----------------|------------------|-----------------|----------------------|----------|------------|
| PERSONNEL EXPENSES | 1,251,676 | 1,161,835 | 981,936 | 0 | 265,373 | 0 | 0 | 0 | 0 | 3,660,820 |
| BENEFIT EXPENSES | 458,031 | 355,401 | 424,782 | 0 | 40,744 | 0 | 0 | 0 | 0 | 1,278,958 |
| MATERIALS & SERVICES | 1,865,759 | 1,342,541 | 1,004,152 | 200,000 | 580,488 | 18,000 | 0 | 0 | 0 | 5,010,940 |
| MATERIALS FOR RESALE | 527,599 | 46,000 | 2,085,919 | 0 | 0 | 0 | 0 | 0 | 0 | 2,659,518 |
| FINANCIAL AID | 0 | 0 | 368,540 | 0 | 0 | 0 | 0 | 42,440 | 0 | 410,980 |
| CAPITAL OUTLAY | 159,871 | 132,384 | 147,500 | 0 | 207,500 | 0 | 25,000 | 0 | 0 | 672,255 |
| CONTINGENCY EXPENSE | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 239,380 | 239,380 |
| TRANSFERS OUT | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 298,250 | 0 | 298,250 |
| | 4,262,936 | 3,038,161 | 5,012,829 | 200,000 | 1,094,105 | 18,000 | 25,000 | 340,690 | 239,380 | 14,231,101 |

Auxiliary Fund Requirements by Major Program

| PROGRAM TYPE | ACTUAL | ACTUAL | CURRENT | | PROPOSED | | APPROVED | ADOPTED | |
|---|------------------|------------------|------------------|---------------|------------------|---------------|------------------|------------------|---------------|
| | 2019-2020 | 2020-2021 | BUDGET | FTE | BUDGET | FTE | BUDGET | BUDGET | FTE |
| 10000 INSTRUCTION | | | | | | | | | |
| Personnel Services | 1,213,389 | 987,296 | 1,607,772 | 24.643 | 1,709,707 | 23.166 | 1,709,707 | 1,709,707 | 23.166 |
| Materials & Services | 954,088 | 688,608 | 2,481,636 | n/a | 2,393,358 | n/a | 2,393,358 | 2,393,358 | n/a |
| Capital Outlay | 0 | 829 | 159,871 | n/a | 159,871 | n/a | 159,871 | 159,871 | n/a |
| Transfers Out | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 2,167,477 | 1,676,733 | 4,249,279 | 24.643 | 4,262,936 | 23.166 | 4,262,936 | 4,262,936 | 23.166 |
| 20000 INSTRUCTIONAL SUPPORT | | | | | | | | | |
| Personnel Services | 626,030 | 531,021 | 1,571,656 | 28.718 | 1,517,236 | 25.265 | 1,517,236 | 1,517,236 | 25.265 |
| Materials & Services | 355,037 | 423,912 | 1,060,428 | n/a | 1,388,809 | n/a | 1,388,809 | 1,388,541 | n/a |
| Capital Outlay | 6,021 | 1,666 | 133,884 | n/a | 132,384 | n/a | 132,384 | 132,384 | n/a |
| Transfers Out | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 987,088 | 956,599 | 2,765,968 | 28.718 | 3,038,429 | 25.265 | 3,038,429 | 3,038,161 | 25.265 |
| 30000 STUDENT SERVICES | | | | | | | | | |
| Personnel Services | 60,224 | 36,312 | 208,178 | 3.601 | 463,013 | 8.004 | 463,013 | 463,013 | 8.004 |
| Materials & Services | 541,139 | 299,740 | 788,952 | n/a | 929,452 | n/a | 929,452 | 1,050,092 | n/a |
| Capital Outlay | 6,716 | 29,600 | 51,000 | n/a | 51,000 | n/a | 51,000 | 51,000 | n/a |
| Transfers Out | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 608,079 | 365,652 | 1,048,130 | 3.601 | 1,443,465 | 8.004 | 1,443,465 | 1,564,105 | 8.004 |
| 40000 COMMUNITY SERVICES | | | | | | | | | |
| Personnel Services | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Materials & Services | 192,200 | 192,400 | 200,000 | n/a | 200,000 | n/a | 200,000 | 200,000 | n/a |
| Capital Outlay | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Transfers Out | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 192,200 | 192,400 | 200,000 | n/a | 200,000 | n/a | 200,000 | 200,000 | n/a |
| 50000 COLLEGE SUPPORT SERVICES | | | | | | | | | |
| Personnel Services | 129,300 | 94,793 | 290,272 | 1.000 | 306,117 | 1.000 | 306,117 | 306,117 | 1.000 |
| Materials & Services | 84,152 | 60,825 | 629,674 | n/a | 580,488 | n/a | 580,488 | 580,488 | n/a |
| Capital Outlay | 0 | 0 | 231,539 | n/a | 207,500 | n/a | 207,500 | 207,500 | n/a |
| Transfers Out | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 213,452 | 155,618 | 1,151,485 | 1.000 | 1,094,105 | 1.000 | 1,094,105 | 1,094,105 | 1.000 |
| 60000 PLANT OPERATIONS/MAINTENANCE | | | | | | | | | |
| Personnel Services | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Materials & Services | 153,376 | 67,943 | 18,000 | n/a | 18,000 | n/a | 18,000 | 18,000 | n/a |
| Capital Outlay | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Transfers Out | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 153,376 | 67,943 | 18,000 | n/a | 18,000 | n/a | 18,000 | 18,000 | n/a |

Auxiliary Fund Requirements by Major Program

| PROGRAM TYPE | ACTUAL | ACTUAL | CURRENT | | PROPOSED | | APPROVED | ADOPTED | |
|-------------------------------------|------------------|------------------|-------------------|---------------|-------------------|---------------|-------------------|-------------------|---------------|
| | 2019-2020 | 2020-2021 | BUDGET | FTE | BUDGET | FTE | BUDGET | BUDGET | FTE |
| 70000 PLANT ADDITIONS | | | | | | | | | |
| Personnel Services | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Materials & Services | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Capital Outlay | 0 | 0 | 25,000 | n/a | 25,000 | n/a | 25,000 | 25,000 | n/a |
| Transfers Out | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 0 | 0 | 25,000 | n/a | 25,000 | n/a | 25,000 | 25,000 | n/a |
| 75000 TRANSFERS | | | | | | | | | |
| Personnel Services | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Materials & Services | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Capital Outlay | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Transfers Out | 202,705 | 336,565 | 208,985 | n/a | 340,690 | n/a | 340,690 | 340,690 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 202,705 | 336,565 | 208,985 | n/a | 340,690 | n/a | 340,690 | 340,690 | n/a |
| 85000 AUXILIARY ENTERPRISES | | | | | | | | | |
| Personnel Services | 0 | 653,587 | 1,051,304 | 15.706 | 943,705 | 13.973 | 943,705 | 943,705 | 13.973 |
| Materials & Services | 8,368 | 781,534 | 2,974,219 | n/a | 2,408,519 | n/a | 2,408,519 | 2,408,519 | n/a |
| Capital Outlay | 0 | 0 | 96,500 | n/a | 96,500 | n/a | 96,500 | 96,500 | n/a |
| Transfers Out | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 8,368 | 1,435,121 | 4,122,023 | 15.706 | 3,448,724 | 13.973 | 3,448,724 | 3,448,724 | 13.973 |
| 90000 RESERVES (CONTINGENCY) | | | | | | | | | |
| Personnel Services | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Materials & Services | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Capital Outlay | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Transfers Out | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 283,950 | n/a | 239,380 | n/a | 239,380 | 239,380 | n/a |
| Total Program Requirements | 0 | 0 | 283,950 | n/a | 239,380 | n/a | 239,380 | 239,380 | n/a |
| TOTAL REQUIREMENTS | | | | | | | | | |
| Personnel Services | 2,028,943 | 2,303,009 | 4,729,182 | 73.668 | 4,939,778 | 71.408 | 4,939,778 | 4,939,778 | 71.408 |
| Materials & Services | 2,288,360 | 2,514,962 | 8,152,909 | n/a | 7,918,626 | n/a | 7,918,626 | 8,038,998 | n/a |
| Capital Outlay | 12,737 | 32,095 | 697,794 | n/a | 672,255 | n/a | 672,255 | 672,255 | n/a |
| Transfers Out | 202,705 | 336,565 | 208,985 | n/a | 340,690 | n/a | 340,690 | 340,690 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 283,950 | n/a | 239,380 | n/a | 239,380 | 239,380 | n/a |
| TOTAL PROGRAM REQUIREMENTS | 4,532,745 | 5,186,631 | 14,072,820 | 73.668 | 14,110,729 | 71.408 | 14,110,729 | 14,231,101 | 71.408 |

Auxiliary Fund

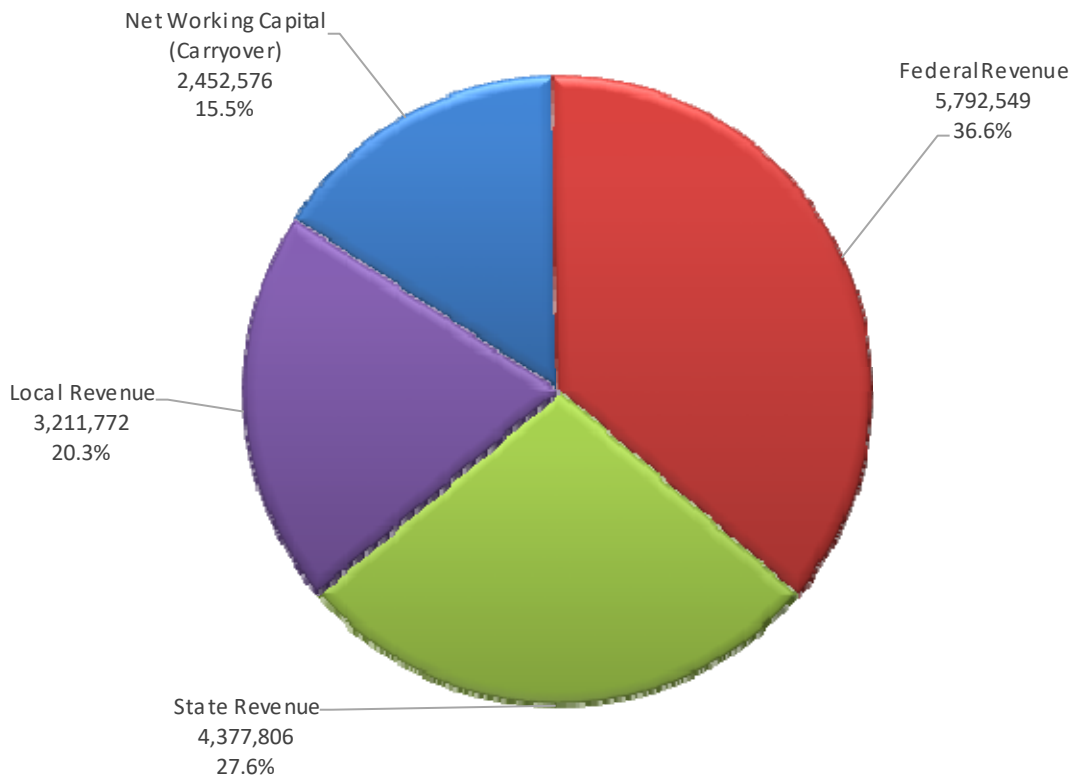
Summary of Resources and Requirements

| RESOURCES | | | | | | |
|---------------------------------|------------------|------------------|-------------------|-------------------|-------------------|-------------------|
| | ACTUAL | ACTUAL | CURRENT | PROPOSED | APPROVED | ADOPTED |
| | 2019-2020 | 2020-2021 | BUDGET | BUDGET | BUDGET | BUDGET |
| | 2019-2020 | 2020-2021 | 2021-2022 | 2022-2023 | 2022-2023 | 2022-2023 |
| Division Projects | 1,211,012 | 891,908 | 2,764,919 | 2,678,299 | 2,678,299 | 2,678,900 |
| Division Instructional Fees | 395,452 | 371,803 | 1,020,495 | 1,020,995 | 1,020,995 | 1,020,995 |
| Conferences/Contracted Training | 1,546,291 | 1,243,153 | 3,069,572 | 3,703,935 | 3,703,935 | 3,828,935 |
| Student Activities | 220,957 | 230,335 | 535,070 | 528,782 | 528,782 | 523,821 |
| Athletics | 221,267 | 211,387 | 246,117 | 257,238 | 257,238 | 257,238 |
| Excess Property | 8,480 | 31,442 | 26,848 | 18,268 | 18,268 | 18,000 |
| Technology Fee | 543,501 | 526,737 | 812,587 | 856,614 | 856,614 | 856,614 |
| Transportation/Safety Fee | 197,779 | 239,621 | 250,000 | 250,000 | 250,000 | 250,000 |
| Enterprise Funds | 0 | 1,523,862 | 4,125,702 | 3,455,243 | 3,455,243 | 3,455,243 |
| Lebanon Center Rental Fund | 307,436 | 309,312 | 481,070 | 581,070 | 581,070 | 581,070 |
| Research Enterprise | 176,200 | 175,200 | 157,440 | 160,285 | 160,285 | 160,285 |
| Auxiliary Revenue Program | 0 | 0 | 583,000 | 600,000 | 600,000 | 600,000 |
| TOTAL RESOURCES | 4,828,375 | 5,754,760 | 14,072,820 | 14,110,729 | 14,110,729 | 14,231,101 |

| REQUIREMENTS | | | | | | |
|---------------------------------|------------------|------------------|-------------------|-------------------|-------------------|-------------------|
| | ACTUAL | ACTUAL | CURRENT | PROPOSED | APPROVED | ADOPTED |
| | 2019-2020 | 2020-2021 | BUDGET | BUDGET | BUDGET | BUDGET |
| | 2019-2020 | 2020-2021 | 2021-2022 | 2022-2023 | 2022-2023 | 2022-2023 |
| Division Projects | 1,194,553 | 730,644 | 2,764,919 | 2,678,299 | 2,678,299 | 2,678,900 |
| Division Instructional Fees | 257,995 | 293,093 | 1,020,495 | 1,020,995 | 1,020,995 | 1,020,995 |
| Conferences/Contracted Training | 1,499,126 | 1,347,173 | 3,069,572 | 3,703,935 | 3,703,935 | 3,828,935 |
| Student Activities | 243,067 | 188,769 | 535,070 | 528,782 | 528,782 | 523,821 |
| Athletics | 276,629 | 137,113 | 246,117 | 257,238 | 257,238 | 257,238 |
| Excess Property | 1,526 | 135 | 26,848 | 18,268 | 18,268 | 18,000 |
| Technology Fee | 337,148 | 478,981 | 812,587 | 856,614 | 856,614 | 856,614 |
| Transportation/Safety Fee | 252,332 | 210,486 | 250,000 | 250,000 | 250,000 | 250,000 |
| Enterprise Funds | 2,874 | 1,435,633 | 4,125,702 | 3,455,243 | 3,455,243 | 3,455,243 |
| East Linn Center | 311,373 | 241,026 | 481,070 | 581,070 | 581,070 | 581,070 |
| Research Enterprise | 156,122 | 123,578 | 157,440 | 160,285 | 160,285 | 160,285 |
| Auxiliary Revenue Program | 0 | 0 | 583,000 | 600,000 | 600,000 | 600,000 |
| TOTAL REQUIREMENTS | 4,532,745 | 5,186,631 | 14,072,820 | 14,110,729 | 14,110,729 | 14,231,101 |

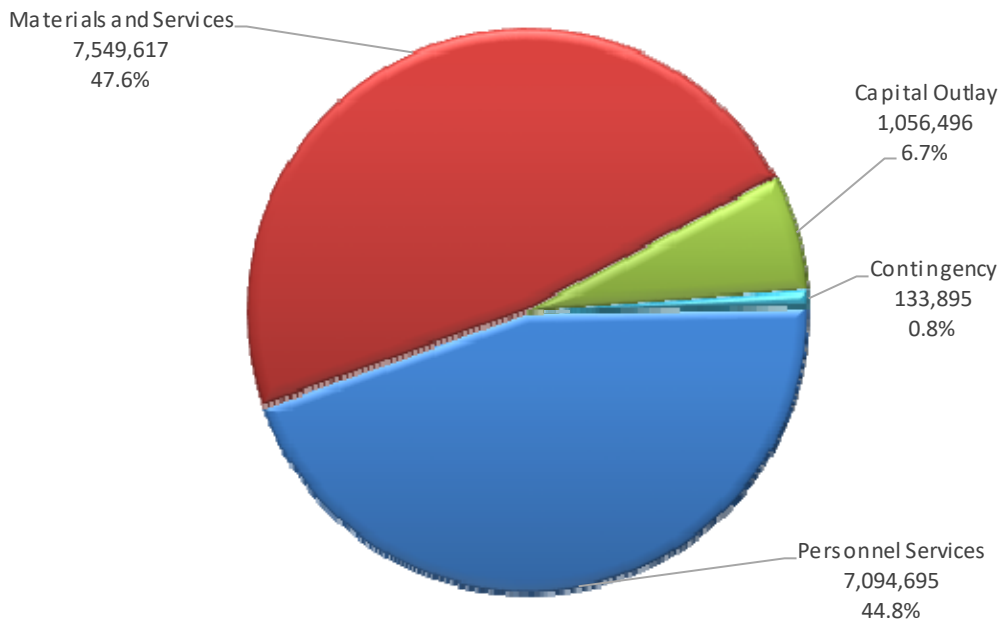
Special Projects Fund Summary of Resources

| | ACTUAL <u>2019-2020</u> | ACTUAL <u>2020-2021</u> | CURRENT BUDGET <u>2021-2022</u> | ADOPTED BUDGET <u>2022-2023</u> |
|---------------------------------|----------------------------|-----------------------------|---------------------------------------|---------------------------------------|
| Net Working Capital (Carryover) | \$ 810,007 | \$ 774,226 | \$ 1,177,801 | \$ 2,452,576 |
| Federal Revenue | 3,058,135 | 11,675,952 | 15,060,716 | 5,792,549 |
| State Revenue | 2,410,346 | 2,694,966 | 3,313,113 | 4,377,806 |
| Local Revenue | 1,977,014 | 1,249,668 | 3,371,504 | 3,211,772 |
| Other Revenue | 68,213 | 14,812 | 0 | 0 |
| Transfers In | <u>34</u> | <u>136,606</u> | <u>0</u> | <u>0</u> |
| TOTAL RESOURCES | <u>\$ 8,323,749</u> | <u>\$ 16,546,230</u> | <u>\$ 22,923,134</u> | <u>\$ 15,834,703</u> |



Special Projects Fund Summary of Requirements

| | <u>ACTUAL</u> <u>2019-2020</u> | <u>ACTUAL</u> <u>2020-2021</u> | <u>CURRENT</u> <u>BUDGET</u> <u>2021-2022</u> | <u>ADOPTED</u> <u>BUDGET</u> <u>2022-2023</u> |
|------------------------------------|-----------------------------------|-----------------------------------|---|---|
| Personnel Services | \$ 3,549,340 | \$ 4,502,851 | \$ 6,277,093 | \$ 7,094,695 |
| Materials and Services | 3,048,276 | 10,871,233 | 16,005,650 | 7,549,617 |
| Capital Outlay | 801,907 | 85,178 | 506,496 | 1,056,496 |
| Transfers Out | 150,000 | 0 | 0 | 0 |
| Contingency | <u>0</u> | <u>0</u> | <u>133,895</u> | <u>133,895</u> |
| Sub-Total | 7,549,523 | 15,459,262 | 22,923,134 | 15,834,703 |
| Unappropriated Ending Fund Balance | <u>774,226</u> | <u>1,086,968</u> | <u>0</u> | <u>0</u> |
| TOTAL REQUIREMENTS | <u>\$ 8,323,749</u> | <u>\$ 16,546,230</u> | <u>\$ 22,923,134</u> | <u>\$ 15,834,703</u> |



Special Projects Fund Summary by Use

| ACCOUNT | INSTRUCTION | INST. SUPPORT | STUDENT SERVICES | COMMUNITY SERVICES | COLLEGE SUPPORT | PLANT OPERATIONS | PLANT ADDITIONS | FINANCIAL AID/AGENCY | RESERVES | TOTAL |
|----------------------|------------------|------------------|---------------------|-----------------------|--------------------|---------------------|--------------------|-------------------------|----------------|-------------------|
| PERSONNEL EXPENSES | 1,703,950 | 2,312,821 | 332,733 | 0 | 837,539 | 0 | 0 | 0 | 0 | 5,187,043 |
| BENEFIT EXPENSES | 775,673 | 844,041 | 115,710 | 0 | 172,228 | 0 | 0 | 0 | 0 | 1,907,652 |
| MATERIALS & SERVICES | 1,188,950 | 4,430,643 | 300,474 | 0 | 1,006,859 | 0 | 0 | 0 | 0 | 6,926,926 |
| FINANCIAL AID | 0 | 122,691 | 0 | 0 | 0 | 0 | 0 | 500,000 | 0 | 622,691 |
| CAPITAL OUTLAY | 56,496 | 150,000 | 0 | 0 | 850,000 | 0 | 0 | 0 | 0 | 1,056,496 |
| CONTINGENCY EXPENSE | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 133,895 | 133,895 |
| | <u>3,725,069</u> | <u>7,860,196</u> | <u>748,917</u> | <u>0</u> | <u>2,866,626</u> | <u>0</u> | <u>0</u> | <u>500,000</u> | <u>133,895</u> | <u>15,834,703</u> |

Special Projects Fund Requirements by Major Program

| PROGRAM TYPE | ACTUAL | ACTUAL | CURRENT | | PROPOSED | | APPROVED | ADOPTED | |
|---------------------------------------|-----------|-----------|-----------|--------|-----------|--------|-----------|-----------|--------|
| | 2019-2020 | 2020-2021 | BUDGET | FTE | BUDGET | FTE | BUDGET | BUDGET | FTE |
| 10000 INSTRUCTION | | | | | | | | | |
| Personnel Services | 1,694,690 | 1,906,101 | 2,141,466 | 30.928 | 2,479,623 | 33.121 | 2,479,623 | 2,479,623 | 33.121 |
| Materials & Services | 874,262 | 1,270,976 | 736,311 | n/a | 1,188,950 | n/a | 1,188,950 | 1,188,950 | n/a |
| Capital Outlay | 769,645 | 9,371 | 56,496 | n/a | 56,496 | n/a | 56,496 | 56,496 | n/a |
| Transfers Out | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 3,338,597 | 3,186,448 | 2,934,273 | 30.928 | 3,725,069 | 33.121 | 3,725,069 | 3,725,069 | 33.121 |
| 20000 INSTRUCTIONAL SUPPORT | | | | | | | | | |
| Personnel Services | 1,762,824 | 1,801,636 | 2,675,924 | 12.644 | 3,156,862 | 19.376 | 3,156,862 | 3,156,862 | 19.376 |
| Materials & Services | 1,033,687 | 1,405,496 | 3,538,809 | n/a | 4,508,039 | n/a | 4,508,039 | 4,553,334 | n/a |
| Capital Outlay | 0 | 0 | 100,000 | n/a | 100,000 | n/a | 100,000 | 150,000 | n/a |
| Transfers Out | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 2,796,511 | 3,207,132 | 6,314,733 | 12.644 | 7,764,901 | 19.376 | 7,764,901 | 7,860,196 | 19.376 |
| 30000 STUDENT SERVICES | | | | | | | | | |
| Personnel Services | 76,688 | 263,465 | 439,215 | 4.818 | 448,443 | 4.817 | 448,443 | 448,443 | 4.817 |
| Materials & Services | 124,196 | 297,194 | 415,274 | n/a | 300,474 | n/a | 300,474 | 300,474 | n/a |
| Capital Outlay | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Transfers Out | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 200,884 | 560,659 | 854,489 | 4.818 | 748,917 | 4.817 | 748,917 | 748,917 | 4.817 |
| 50000 COLLEGE SUPPORT SERVICES | | | | | | | | | |
| Personnel Services | 15,138 | 531,649 | 1,020,488 | 20.358 | 1,009,767 | 9.278 | 1,009,767 | 1,009,767 | 9.278 |
| Materials & Services | 203,686 | 5,537,532 | 5,786,662 | n/a | 1,006,859 | n/a | 1,006,859 | 1,006,859 | n/a |
| Capital Outlay | 32,262 | 75,807 | 350,000 | n/a | 850,000 | n/a | 850,000 | 850,000 | n/a |
| Transfers Out | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 251,086 | 6,144,988 | 7,157,150 | 20.358 | 2,866,626 | 9.278 | 2,866,626 | 2,866,626 | 9.278 |
| 75000 TRANSFERS | | | | | | | | | |
| Personnel Services | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Materials & Services | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Capital Outlay | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Transfers Out | 150,000 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 150,000 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |

Special Projects Fund Requirements by Major Program

| PROGRAM TYPE | ACTUAL | | CURRENT | FTE | PROPOSED | | APPROVED | ADOPTED | FTE |
|-------------------------------------|------------------|-------------------|-------------------|---------------|-------------------|---------------|-------------------|-------------------|---------------|
| | 2019-2020 | 2020-2021 | BUDGET | | 2022-2023 | FTE | BUDGET | BUDGET | |
| 80000 FINANCIAL AID | | | | | | | | | |
| Personnel Services | 0 | 0 | 0 | n/a | 0 | 0.000 | 0 | 0 | 0.000 |
| Materials & Services | 812,445 | 2,360,035 | 5,528,594 | n/a | 500,000 | n/a | 500,000 | 500,000 | n/a |
| Capital Outlay | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Transfers Out | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 812,445 | 2,360,035 | 5,528,594 | n/a | 500,000 | n/a | 500,000 | 500,000 | n/a |
| 90000 RESERVES (CONTINGENCY) | | | | | | | | | |
| Personnel Services | 0 | 0 | 0 | n/a | 0 | 0.000 | 0 | 0 | 0.000 |
| Materials & Services | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Capital Outlay | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Transfers Out | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 133,895 | n/a | 133,895 | n/a | 133,895 | 133,895 | n/a |
| Total Program Requirements | 0 | 0 | 133,895 | n/a | 133,895 | n/a | 133,895 | 133,895 | n/a |
| TOTAL REQUIREMENTS | | | | | | | | | |
| Personnel Services | 3,549,340 | 4,502,851 | 6,277,093 | 68.748 | 7,094,695 | 66.592 | 7,094,695 | 7,094,695 | 66.592 |
| Materials & Services | 3,048,276 | 10,871,233 | 16,005,650 | n/a | 7,504,322 | n/a | 7,504,322 | 7,549,617 | n/a |
| Capital Outlay | 801,907 | 85,178 | 506,496 | n/a | 1,006,496 | n/a | 1,006,496 | 1,056,496 | n/a |
| Transfers Out | 150,000 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 133,895 | n/a | 133,895 | n/a | 133,895 | 133,895 | n/a |
| TOTAL PROGRAM REQUIREMENTS | 7,549,523 | 15,459,262 | 22,923,134 | 68.748 | 15,739,408 | 66.592 | 15,739,408 | 15,834,703 | 66.592 |

Special Projects Fund

Summary of Resources and Requirements

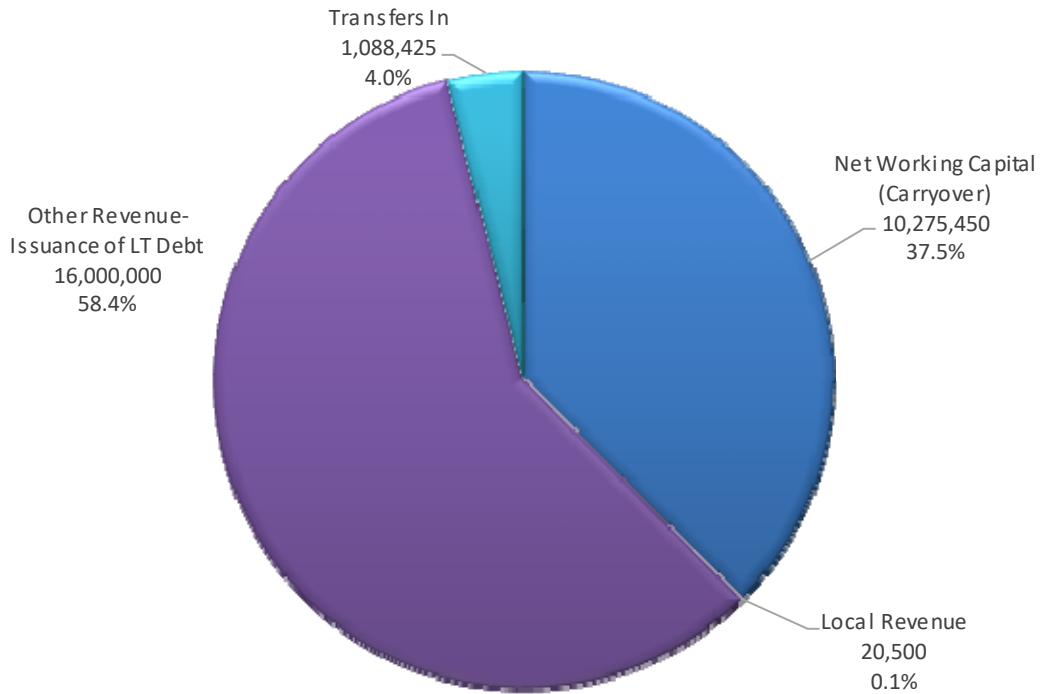
| RESOURCES | | | | | | |
|-----------------------------|---------------------|---------------------|--------------------------------|---------------------------------|---------------------------------|--------------------------------|
| | ACTUAL 2019-2020 | ACTUAL 2020-2021 | CURRENT BUDGET 2021-2022 | PROPOSED BUDGET 2022-2023 | APPROVED BUDGET 2022-2023 | ADOPTED BUDGET 2022-2023 |
| Federal Grants | 2,999,135 | 11,110,420 | 15,564,372 | 5,800,629 | 5,800,629 | 5,895,924 |
| State Grants | 2,583,658 | 2,633,088 | 3,673,809 | 6,520,784 | 6,520,784 | 6,520,784 |
| Local Grants | 1,930,949 | 2,028,496 | 2,871,443 | 2,517,995 | 2,517,995 | 2,517,995 |
| Unallocated Special Revenue | 0 | 0 | 813,510 | 900,000 | 900,000 | 900,000 |
| TOTAL RESOURCES | 7,513,742 | 15,772,004 | 22,923,134 | 15,739,408 | 15,739,408 | 15,834,703 |

| REQUIREMENTS | | | | | | |
|-----------------------------|---------------------|---------------------|--------------------------------|---------------------------------|---------------------------------|--------------------------------|
| | ACUTAL 2019-2020 | ACTUAL 2020-2021 | CURRENT BUDGET 2021-2022 | PROPOSED BUDGET 2022-2023 | APPROVED BUDGET 2022-2023 | ADOPTED BUDGET 2022-2023 |
| Federal Grants | 2,987,948 | 11,271,457 | 15,564,372 | 5,800,629 | 5,800,629 | 5,895,924 |
| State Grants | 2,377,177 | 2,845,050 | 3,673,809 | 6,520,784 | 6,520,784 | 6,520,784 |
| Local Grants | 2,184,398 | 1,342,755 | 2,871,443 | 2,517,995 | 2,517,995 | 2,517,995 |
| Unallocated Special Revenue | 0 | 0 | 813,510 | 900,000 | 900,000 | 900,000 |
| TOTAL REQUIREMENTS | 7,549,523 | 15,459,262 | 22,923,134 | 15,739,408 | 15,739,408 | 15,834,703 |

Prior year columns show actual revenues and expenditures for the fiscal year indicated. Net working capital and ending fund balance are not included. Budget year columns show estimated resources (including net working capital-carryover) and estimated requirements.

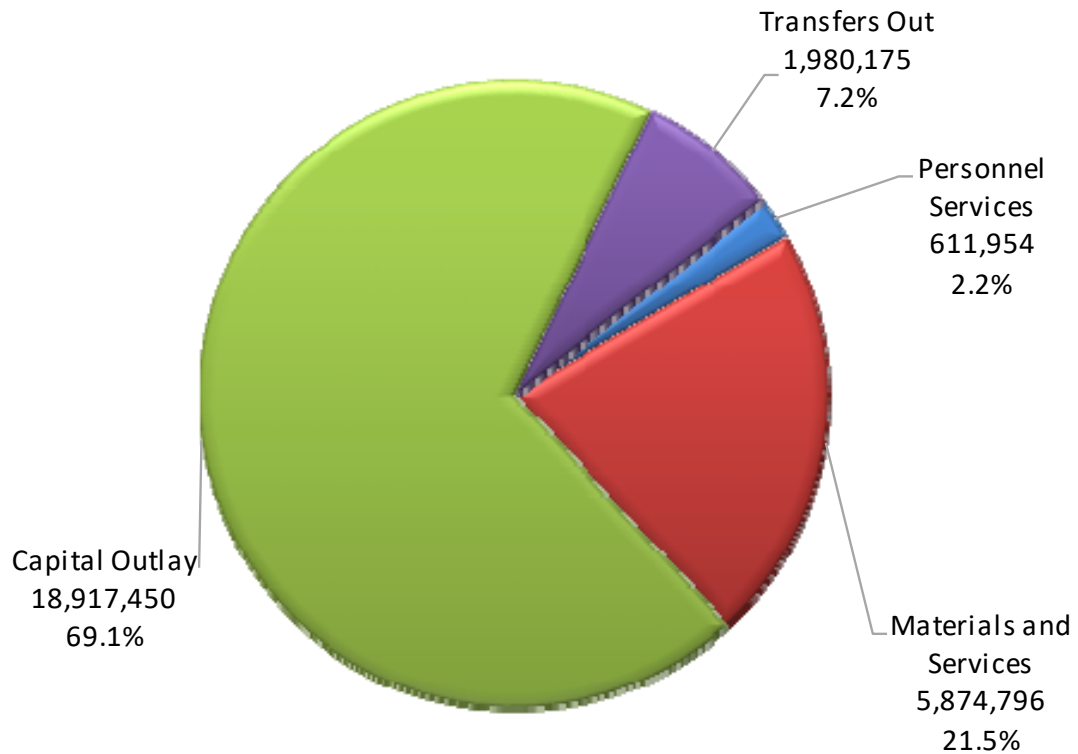
Capital Projects Fund Summary of Resources

| | ACTUAL 2019-2020 | ACTUAL 2020-2021 | CURRENT BUDGET 2021-2022 | ADOPTED BUDGET 2022-2023 |
|-----------------------------------|-----------------------------|-----------------------------|--------------------------------|--------------------------------|
| Net Working Capital (Carryover) | \$ 5,300,966 | \$ 5,432,961 | \$ 14,305,450 | \$ 10,275,450 |
| State Revenue | 10,500,000 | 36,312 | 0 | 0 |
| Local Revenue | 113,288 | 102,401 | 52,500 | 20,500 |
| Other Revenue-Issuance of LT Debt | 0 | 7,969,960 | 0 | 16,000,000 |
| Transfers In | <u>1,183,250</u> | <u>933,250</u> | <u>966,645</u> | <u>1,088,425</u> |
| TOTAL RESOURCES | <u>\$ 17,097,504</u> | <u>\$ 14,474,884</u> | <u>\$ 15,324,595</u> | <u>\$ 27,384,375</u> |



Capital Projects Fund Summary of Requirements

| | ACTUAL 2019-2020 | ACTUAL 2020-2021 | CURRENT BUDGET 2021-2022 | ADOPTED BUDGET 2022-2023 |
|------------------------------------|----------------------|----------------------|--------------------------------|--------------------------------|
| Personnel Services | \$ 0 | \$ 0 | \$ 0 | \$ 611,954 |
| Materials and Services | 1,362,905 | 1,154,221 | 1,718,750 | 5,874,796 |
| Capital Outlay | 10,301,638 | 5,607,888 | 13,597,450 | 18,917,450 |
| Transfers Out | 0 | 136,606 | 8,395 | 1,980,175 |
| <i>Sub-Total</i> | 11,664,543 | 6,898,715 | 15,324,595 | 27,384,375 |
| Unappropriated Ending Fund Balance | 5,432,961 | 7,576,169 | 0 | 0 |
| TOTAL REQUIREMENTS | \$ 17,097,504 | \$ 14,474,884 | \$ 15,324,595 | \$ 27,384,375 |



Capital Projects Fund Summary by Use

| ACCOUNT | INSTR. | STUDENT | COMMUNITY | COLLEGE | PLANT | PLANT | TRANSFERS | RESERVES | TOTAL |
|----------------------|---------|----------|-----------|---------|------------|-----------|------------|-----------|------------|
| INSTRUCTION | SUPPORT | SERVICES | SERVICES | SUPPORT | OPERATIONS | ADDITIONS | | | |
| PERSONNEL EXPENSES | | 500,000 | | | 0 | 0 | 0 | | 500,000 |
| BENEFIT EXPENSES | 0 | 111,954 | | | 0 | 0 | 0 | | 111,954 |
| MATERIALS & SERVICES | 0 | 10,000 | 0 | 0 | 2,193,046 | 671,750 | 3,000,000 | 0 | 5,874,796 |
| CAPITAL OUTLAY | 5,450 | 30,000 | 0 | 0 | 4,310,000 | 572,000 | 14,000,000 | 0 | 18,917,450 |
| TRANSFERS OUT | 0 | 0 | 0 | 0 | 0 | 0 | 1,980,175 | 0 | 1,980,175 |
| | 5,450 | 40,000 | 0 | 0 | 6,503,046 | 1,243,750 | 17,000,000 | 1,980,175 | 27,384,375 |

Capital Projects Fund

Requirements by Major Program

| PROGRAM TYPE | ACTUAL 2019-2020 | ACTUAL 2020-2021 | CURRENT BUDGET 2021-2022 | PROPOSED BUDGET 2022-2023 | FTE | APPROVED BUDGET 2022-2023 | ADOPTED BUDGET 2022-2023 | FTE |
|---|---------------------|---------------------|--------------------------------|---------------------------------|--------------|---------------------------------|--------------------------------|--------------|
| 10000 INSTRUCTION | | | | | | | | |
| Personnel Services | 0 | 0 | 0 | 0 | n/a | 0 | 0 | n/a |
| Materials & Services | 57,706 | 0 | 0 | 0 | n/a | 0 | 0 | n/a |
| Capital Outlay | 14,031 | 30,000 | 5,450 | 5,450 | n/a | 5,450 | 5,450 | n/a |
| Transfers Out | 0 | 0 | 0 | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | <u>71,737</u> | <u>30,000</u> | <u>5,450</u> | <u>5,450</u> | <u>n/a</u> | <u>5,450</u> | <u>5,450</u> | <u>n/a</u> |
| 20000 INSTRUCTIONAL SUPPORT | | | | | | | | |
| Personnel Services | 0 | 0 | 0 | 611,954 | 5.250 | 611,954 | 611,954 | 5.250 |
| Materials & Services | 1,036 | 10,000 | 22,000 | 10,000 | n/a | 10,000 | 10,000 | n/a |
| Capital Outlay | 0 | 0 | 30,000 | 30,000 | n/a | 30,000 | 30,000 | n/a |
| Transfers Out | 0 | 0 | 0 | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | <u>1,036</u> | <u>10,000</u> | <u>52,000</u> | <u>651,954</u> | <u>5.250</u> | <u>651,954</u> | <u>651,954</u> | <u>5.250</u> |
| 50000 COLLEGE SUPPORT SERVICES | | | | | | | | |
| Personnel Services | 0 | 0 | 0 | 0 | n/a | 0 | 0 | n/a |
| Materials & Services | 545,026 | 642,943 | 905,000 | 2,193,046 | n/a | 2,193,046 | 2,193,046 | n/a |
| Capital Outlay | 97,917 | 160,787 | 1,140,000 | 4,310,000 | n/a | 4,310,000 | 4,310,000 | n/a |
| Transfers Out | 0 | 0 | 0 | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | <u>642,943</u> | <u>803,730</u> | <u>2,045,000</u> | <u>6,503,046</u> | <u>n/a</u> | <u>6,503,046</u> | <u>6,503,046</u> | <u>n/a</u> |
| 60000 PLANT OPERATIONS/MAINTENANCE | | | | | | | | |
| Personnel Services | 0 | 0 | 0 | 0 | n/a | 0 | 0 | n/a |
| Materials & Services | 329,138 | 340,838 | 671,750 | 671,750 | n/a | 671,750 | 671,750 | n/a |
| Capital Outlay | 0 | 131,411 | 422,000 | 572,000 | n/a | 572,000 | 572,000 | n/a |
| Transfers Out | 0 | 0 | 0 | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | <u>329,138</u> | <u>472,249</u> | <u>1,093,750</u> | <u>1,243,750</u> | <u>n/a</u> | <u>1,243,750</u> | <u>1,243,750</u> | <u>n/a</u> |
| 70000 PLANT ADDITIONS | | | | | | | | |
| Personnel Services | 0 | 0 | 0 | 0 | n/a | 0 | 0 | n/a |
| Materials & Services | 429,999 | 160,440 | 120,000 | 3,000,000 | n/a | 3,000,000 | 3,000,000 | n/a |
| Capital Outlay | 10,189,690 | 5,285,690 | 12,000,000 | 14,000,000 | n/a | 14,000,000 | 14,000,000 | n/a |
| Transfers Out | 0 | 0 | 0 | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | <u>10,619,689</u> | <u>5,446,130</u> | <u>12,120,000</u> | <u>17,000,000</u> | <u>n/a</u> | <u>17,000,000</u> | <u>17,000,000</u> | <u>n/a</u> |

Capital Projects Fund Requirements by Major Program

| PROGRAM TYPE | ACTUAL 2019-2020 | ACTUAL 2020-2021 | CURRENT BUDGET 2021-2022 | PROPOSED BUDGET 2022-2023 | FTE | APPROVED BUDGET 2022-2023 | ADOPTED BUDGET 2022-2023 | FTE |
|-----------------------------------|---------------------|---------------------|--------------------------------|---------------------------------|-------|---------------------------------|--------------------------------|-------|
| 75000 TRANSFERS | | | | | | | | |
| Total Personnel Services | 0 | 0 | 0 | 0 | n/a | 0 | 0 | n/a |
| Materials & Services | 0 | 0 | 0 | 0 | n/a | 0 | 0 | n/a |
| Capital Outlay | 0 | 0 | 0 | 0 | n/a | 0 | 0 | n/a |
| Transfers Out | 0 | 136,606 | 8,395 | 1,980,175 | n/a | 1,980,175 | 1,980,175 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 0 | 136,606 | 8,395 | 1,980,175 | n/a | 1,980,175 | 1,980,175 | n/a |
| TOTAL REQUIREMENTS | | | | | | | | |
| Personnel Services | 0 | 0 | 0 | 611,954 | 5.250 | 611,954 | 611,954 | 5.250 |
| Materials & Services | 1,362,905 | 1,154,221 | 1,718,750 | 5,874,796 | n/a | 5,874,796 | 5,874,796 | n/a |
| Capital Outlay | 10,301,638 | 5,607,888 | 13,597,450 | 18,917,450 | n/a | 18,917,450 | 18,917,450 | n/a |
| Transfers Out | 0 | 136,606 | 8,395 | 1,980,175 | n/a | 1,980,175 | 1,980,175 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | 0 | n/a | 0 | 0 | n/a |
| TOTAL PROGRAM REQUIREMENTS | 11,664,543 | 6,898,715 | 15,324,595 | 27,384,375 | 5.250 | 27,384,375 | 27,384,375 | 5.250 |

Capital Projects Fund Resources and Requirements by Fund

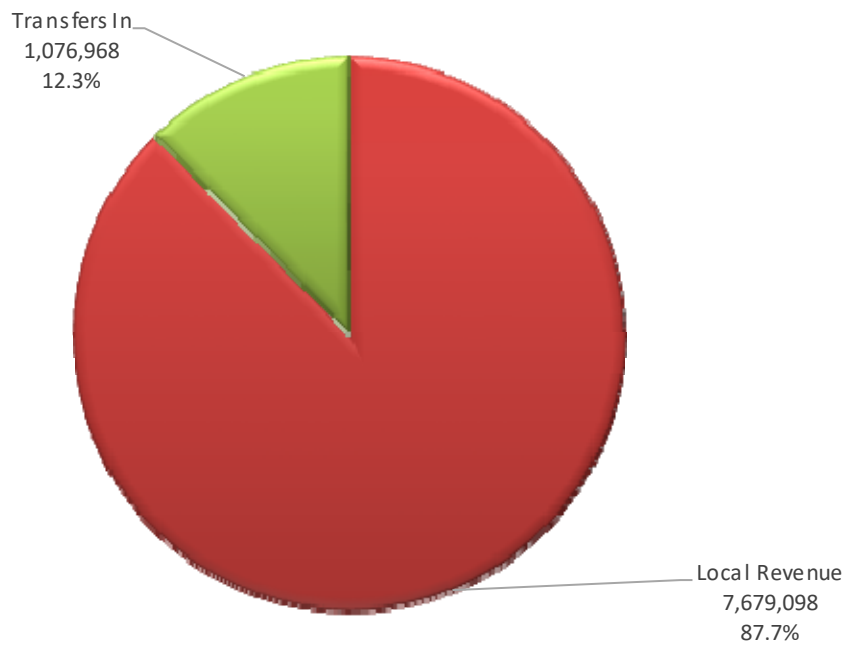
| RESOURCES | | | | | | |
|--|---------------------|---------------------|--------------------------------|---------------------------------|---------------------------------|--------------------------------|
| FUND NUMBER AND NAME | ACTUAL 2019-2020 | ACTUAL 2020-2021 | CURRENT BUDGET 2021-2022 | PROPOSED BUDGET 2022-2023 | APPROVED BUDGET 2022-2023 | ADOPTED BUDGET 2022-2023 |
| 42300 General Equipment Purchase Fund | 30,000 | 30,000 | 48,395 | 110,000 | 110,000 | 110,000 |
| 44100 Capital Reserve | 0 | 0 | 1,000,000 | 8,000,000 | 8,000,000 | 8,000,000 |
| 44150 Benton Cnt. North/Takena Hall | 0 | 7,991,357 | 7,950,000 | 1,000,000 | 1,000,000 | 1,000,000 |
| 44200 Roof Reserve | 223,721 | 64,357 | 471,750 | 621,750 | 621,750 | 621,750 |
| 44235 East Linn Center Roof Reserve | 331 | 0 | 0 | 0 | 0 | 0 |
| 44250 Greenhouse Roof Reserve | 0 | 0 | 5,450 | 5,450 | 5,450 | 5,450 |
| 44400 Telecommunications Reserve | 3,624 | 1,109 | 2,000 | (19,825) | (19,825) | (19,825) |
| 44723 Ag Center | 0 | 2,678 | 0 | 0 | 0 | 0 |
| 44725 District Facilities Imprvm.-Bond | 10,582,211 | 530,267 | 4,170,000 | 16,000,000 | 16,000,000 | 16,000,000 |
| 44800 Major Maintenance Reserve | 348,424 | 382,319 | 622,000 | 622,000 | 622,000 | 622,000 |
| 44900 Technology Reserve | 508,227 | 539,836 | 1,005,000 | 1,005,000 | 1,005,000 | 1,005,000 |
| 44950 Instructional Equipment Reserve | 100,000 | 0 | 50,000 | 40,000 | 40,000 | 40,000 |
| TOTAL RESOURCES | 11,796,538 | 9,541,923 | 15,324,595 | 27,384,375 | 27,384,375 | 27,384,375 |

| REQUIREMENTS | | | | | | |
|---|---------------------|---------------------|--------------------------------|---------------------------------|---------------------------------|--------------------------------|
| FUND NUMBER AND NAME | ACTUAL 2019-2020 | ACTUAL 2020-2021 | CURRENT BUDGET 2021-2022 | PROPOSED BUDGET 2022-2023 | APPROVED BUDGET 2022-2023 | ADOPTED BUDGET 2022-2023 |
| 42300 General Equipment Purchase Fund | 0 | 29,210 | 48,395 | 110,000 | 110,000 | 110,000 |
| 43200 Benton Cnt. Rep. & Maintenance Fu | 0 | (8,395) | 0 | 0 | 0 | 0 |
| 44100 Capital Reserve | 0 | 0 | 1,000,000 | 8,000,000 | 8,000,000 | 8,000,000 |
| 44150 Benton Cnt. North/Takena Hall | 0 | 1,261,329 | 7,950,000 | 1,000,000 | 1,000,000 | 1,000,000 |
| 44200 Roof Reserve | 60,373 | 172,595 | 471,750 | 621,750 | 621,750 | 621,750 |
| 44235 East Linn Center Roof Reserve | 0 | 0 | 0 | 0 | 0 | 0 |
| 44250 Greenhouse Roof Reserve | 0 | 0 | 5,450 | 5,450 | 5,450 | 5,450 |
| 44400 Telecommunications Reserve | 12,391 | 978 | 2,000 | (19,825) | (19,825) | (19,825) |
| 44723 Ag Center | 6,609 | 5,355 | 0 | 0 | 0 | 0 |
| 44725 District Facilities Imprvm.-Bond | 10,619,689 | 4,188,752 | 4,170,000 | 16,000,000 | 16,000,000 | 16,000,000 |
| 44800 Major Maintenance Reserve | 256,425 | 335,474 | 622,000 | 622,000 | 622,000 | 622,000 |
| 44900 Technology Reserve | 609,741 | 736,811 | 1,005,000 | 1,005,000 | 1,005,000 | 1,005,000 |
| 44950 Instructional Equipment Reserve | 99,315 | 176,606 | 50,000 | 40,000 | 40,000 | 40,000 |
| TOTAL REQUIREMENTS | 11,664,543 | 6,898,715 | 15,324,595 | 27,384,375 | 27,384,375 | 27,384,375 |

Prior year columns show actual revenues and expenditures for the fiscal year indicated. Net working capital and ending fund balance are not included. Budget year columns show estimated resources (including net working capital-carryover) and estimated requirements.

Debt Service Fund Summary of Resources

| | <u>ACTUAL 2019-2020</u> | <u>ACTUAL 2020-2021</u> | <u>CURRENT BUDGET 2021-2022</u> | <u>ADOPTED BUDGET 2022-2023</u> |
|---------------------------------|-----------------------------|-----------------------------|---|---|
| Net Working Capital (Carryover) | \$ 409,985 | \$ 520,503 | \$ 0 | \$ 0 |
| Local Revenue | 5,847,920 | 5,968,004 | 6,160,813 | 7,679,098 |
| Transfers In | <u>465,768</u> | <u>697,312</u> | <u>1,079,318</u> | <u>1,076,968</u> |
| TOTAL RESOURCES | \$ <u>6,723,673</u> | \$ <u>7,185,819</u> | \$ <u>7,240,131</u> | \$ <u>8,756,066</u> |



Debt Service Fund Summary of Requirements

| | <u>ACTUAL</u> <u>2019-2020</u> | <u>ACTUAL</u> <u>2020-2021</u> | <u>CURRENT</u> <u>BUDGET</u> <u>2021-2022</u> | <u>ADOPTED</u> <u>BUDGET</u> <u>2022-2023</u> |
|----------------------------------|-----------------------------------|-----------------------------------|---|---|
| Debt Expense | \$ 6,203,170 | \$ 6,643,024 | \$ 7,240,131 | \$ 8,756,066 |
| Ending Fund Balance | <u>520,503</u> | <u>542,795</u> | <u>0</u> | <u>0</u> |
| <i>TOTAL REQUIREMENTS</i> | <u>\$ 6,723,673</u> | <u>\$ 7,185,819</u> | <u>\$ 7,240,131</u> | <u>\$ 8,756,066</u> |

Debt Service Fund Summary by Use

| ACCOUNT | INST. INSTRUCTION | STUDENT SUPPORT | SERVICES | COMMUNITY SERVICES | COLLEGE SUPPORT | PLANT OPERATIONS | PLANT ADDITIONS | FINANCIAL AID/AGENCY | RESERVES | TOTAL |
|--------------|----------------------|--------------------|----------|-----------------------|--------------------|---------------------|--------------------|-------------------------|----------|-----------|
| DEBT EXPENSE | 0 | 0 | 0 | 0 | 8,756,066 | 0 | 0 | 0 | 0 | 8,756,066 |
| | 0 | 0 | 0 | 0 | 8,756,066 | 0 | 0 | 0 | 0 | 8,756,066 |

Debt Service Fund

Requirements by Major Program

| PROGRAM TYPE | ACTUAL 2019-2020 | ACTUAL 2020-2021 | CURRENT BUDGET 2021-2022 | PROPOSED BUDGET 2022-2023 | APPROVED BUDGET 2022-2023 | ADOPTED BUDGET 2022-2023 |
|---------------------------------------|---------------------|---------------------|--------------------------------|---------------------------------|---------------------------------|--------------------------------|
| 50000 COLLEGE SUPPORT SERVICES | | | | | | |
| Personnel Services | 0 | 0 | 0 | 0 | 0 | 0 |
| Materials & Services | 6,203,170 | 6,643,024 | 7,240,131 | 8,756,066 | 8,756,066 | 8,756,066 |
| Capital Outlay | 0 | 0 | 0 | 0 | 0 | 0 |
| Transfers Out | 0 | 0 | 0 | 0 | 0 | 0 |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Program Requirements | 6,203,170 | 6,643,024 | 7,240,131 | 8,756,066 | 8,756,066 | 8,756,066 |
| TOTAL REQUIREMENTS | | | | | | |
| Personnel Services | 0 | 0 | 0 | 0 | 0 | 0 |
| Materials & Services | 6,203,170 | 6,643,024 | 7,240,131 | 8,756,066 | 8,756,066 | 8,756,066 |
| Capital Outlay | 0 | 0 | 0 | 0 | 0 | 0 |
| Transfers Out | 0 | 0 | 0 | 0 | 0 | 0 |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | 0 | 0 | 0 |
| TOTAL PROGRAM REQUIREMENTS | 6,203,170 | 6,643,024 | 7,240,131 | 8,756,066 | 8,756,066 | 8,756,066 |

Debt Service Fund

Resources and Requirements by Fund

| RESOURCES | | | | | | |
|-------------------------------------|---------------------|---------------------|--------------------------------|---------------------------------|---------------------------------|--------------------------------|
| FUND NUMBER AND NAME | ACTUAL 2019-2020 | ACTUAL 2020-2021 | CURRENT BUDGET 2021-2022 | PROPOSED BUDGET 2022-2023 | APPROVED BUDGET 2022-2023 | ADOPTED BUDGET 2022-2023 |
| 51050 Bond Issue Proceeds Fund-2022 | 0 | 0 | 0 | 1,300,000 | 1,300,000 | 1,300,000 |
| 51075 Pension Obligation Bond-2004 | 2,756,652 | 2,777,935 | 2,997,713 | 3,123,098 | 3,123,098 | 3,123,098 |
| 51080 Bond Issue Proceeds Fund-2015 | 3,091,268 | 3,190,068 | 3,163,100 | 3,256,000 | 3,256,000 | 3,256,000 |
| 52105 COP Proceeds Fund--2019 | 0 | 230,545 | 612,150 | 610,000 | 610,000 | 610,000 |
| 52200 COP Proceeds Fund-2017 | 465,768 | 466,768 | 467,168 | 466,968 | 466,968 | 466,968 |
| TOTAL RESOURCES | 6,313,688 | 6,665,316 | 7,240,131 | 8,756,066 | 8,756,066 | 8,756,066 |

| REQUIREMENTS | | | | | | |
|-------------------------------------|---------------------|---------------------|--------------------------------|---------------------------------|---------------------------------|--------------------------------|
| FUND NUMBER AND NAME | ACTUAL 2019-2020 | ACTUAL 2020-2021 | CURRENT BUDGET 2021-2022 | PROPOSED BUDGET 2022-2023 | APPROVED BUDGET 2022-2023 | ADOPTED BUDGET 2022-2023 |
| 51050 Bond Issue Proceeds Fund-2022 | 0 | 0 | 0 | 1,300,000 | 1,300,000 | 1,300,000 |
| 51075 Pension Obligation Bond-2004 | 2,756,652 | 2,875,361 | 2,997,713 | 3,123,098 | 3,123,098 | 3,123,098 |
| 51080 Bond Issue Proceeds Fund-2015 | 2,980,750 | 3,070,350 | 3,163,100 | 3,256,000 | 3,256,000 | 3,256,000 |
| 52105 COP Proceeds Fund--2019 | 0 | 230,545 | 612,150 | 610,000 | 610,000 | 610,000 |
| 52200 COP Proceeds Fund-2017 | 465,768 | 466,768 | 467,168 | 466,968 | 466,968 | 466,968 |
| TOTAL REQUIREMENTS | 6,203,170 | 6,643,024 | 7,240,131 | 8,756,066 | 8,756,066 | 8,756,066 |

Prior year columns show actual revenues and expenditures for the fiscal year indicated. Net working capital and ending fund balance are not included. Budget year columns show estimated resources (including net working capital-carryover) and estimated requirements.

Enterprise Fund

Summary of Resources

| | ACTUAL 2019-2020 | ACTUAL 2020-2021 | CURRENT BUDGET 2021-2022 | ADOPTED BUDGET 2022-2023 |
|---------------------------------|---------------------|---------------------|--------------------------------|--------------------------------|
| Net Working Capital (Carryover) | \$ 207,245 | \$ (423,903) | \$ 0 | \$ 0 |
| Sales/Service Revenue | 2,298,338 | 0 | 0 | 0 |
| Other Revenue | 7,762 | 0 | 0 | 0 |
| Transfers In | 0 | 423,903 | 0 | 0 |
| TOTAL RESOURCES | \$ 2,513,345 | \$ 0 | \$ 0 | \$ 0 |

Enterprise Fund
Summary of Requirements

| | <u>ACTUAL</u> <u>2019-2020</u> | <u>ACTUAL</u> <u>2020-2021</u> | <u>CURRENT</u> <u>BUDGET</u> <u>2021-2022</u> | <u>ADOPTED</u> <u>BUDGET</u> <u>2022-2023</u> |
|---------------------------------------|-----------------------------------|-----------------------------------|---|---|
| Personnel Services | \$ 1,062,311 | \$ 0 | \$ 0 | \$ 0 |
| Materials and Services | 1,884,922 | 0 | 0 | 0 |
| Capital Outlay | 3,900 | 0 | 0 | 0 |
| Contingency | <u>0</u> | <u>0</u> | <u>0</u> | <u>0</u> |
| Sub-Total | 2,951,133 | 0 | 0 | 0 |
| Adjust for Depreciation, Gains/Losses | (13,885) | 0 | 0 | 0 |
| Unappropriated Ending Fund Balance | <u>(423,903)</u> | <u>0</u> | <u>0</u> | <u>0</u> |
| TOTAL REQUIREMENTS | <u>\$ 2,513,345</u> | <u>\$ 0</u> | <u>\$ 0</u> | <u>\$ 0</u> |

Enterprise Fund

Requirements by Major Program

| PROGRAM TYPE | ACTUAL 2019-2020 | ACTUAL 2020-2021 | CURRENT BUDGET 2021-2022 | PROPOSED BUDGET 2022-2023 | APPROVED BUDGET 2022-2023 | ADOPTED BUDGET 2022-2023 |
|-----------------------------------|-------------------------|---------------------|--------------------------------|---------------------------------|---------------------------------|--------------------------------|
| 75000 TRANSFERS | | | | | | |
| Personnel Services | 0 | 0 | 0 | 0 | 0 | 0 |
| Materials & Services | 0 | 0 | 0 | 0 | 0 | 0 |
| Capital Outlay | 0 | 0 | 0 | 0 | 0 | 0 |
| Transfers Out | 0 | 0 | 0 | 0 | 0 | 0 |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Program Requirements | <u>0</u> | <u>0</u> | <u>0</u> | <u>0</u> | <u>0</u> | <u>0</u> |
| 85000 ENTERPRISES | | | | | | |
| Personnel Services | 1,062,311 | 0 | 0 | 0 | 0 | 0 |
| Materials & Services | 1,884,922 | 0 | 0 | 0 | 0 | 0 |
| Capital Outlay | 3,900 | 0 | 0 | 0 | 0 | 0 |
| Transfers Out | 0 | 0 | 0 | 0 | 0 | 0 |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Program Requirements | <u>2,951,133</u> | <u>0</u> | <u>0</u> | <u>0</u> | <u>0</u> | <u>0</u> |
| TOTAL REQUIREMENTS | | | | | | |
| Personnel Services | 1,062,311 | 0 | 0 | 0 | 0 | 0 |
| Materials & Services | 1,884,922 | 0 | 0 | 0 | 0 | 0 |
| Capital Outlay | 3,900 | 0 | 0 | 0 | 0 | 0 |
| Transfers Out | 0 | 0 | 0 | 0 | 0 | 0 |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | 0 | 0 | 0 |
| TOTAL PROGRAM REQUIREMENTS | <u><u>2,951,133</u></u> | <u><u>0</u></u> | <u><u>0</u></u> | <u><u>0</u></u> | <u><u>0</u></u> | <u><u>0</u></u> |

Enterprise Fund

Resources and Requirements by Fund

RESOURCES

| FUND NUMBER AND NAME | ACTUAL | ACTUAL | CURRENT | PROPOSED | APPROVED | ADOPTED |
|------------------------------|------------------|----------------|---------------------|---------------------|---------------------|---------------------|
| | 2019-2020 | 2020-2021 | BUDGET 2021-2022 | BUDGET 2022-2023 | BUDGET 2022-2023 | BUDGET 2022-2023 |
| 61000 Food Services Fund | 495,722 | 56,745 | 0 | 0 | 0 | 0 |
| 62000 Bookstore Fund | 1,494,544 | 322,743 | 0 | 0 | 0 | 0 |
| 63000 Printing Services Fund | 315,834 | 44,415 | 0 | 0 | 0 | 0 |
| TOTAL RESOURCES | 2,306,100 | 423,903 | 0 | 0 | 0 | 0 |

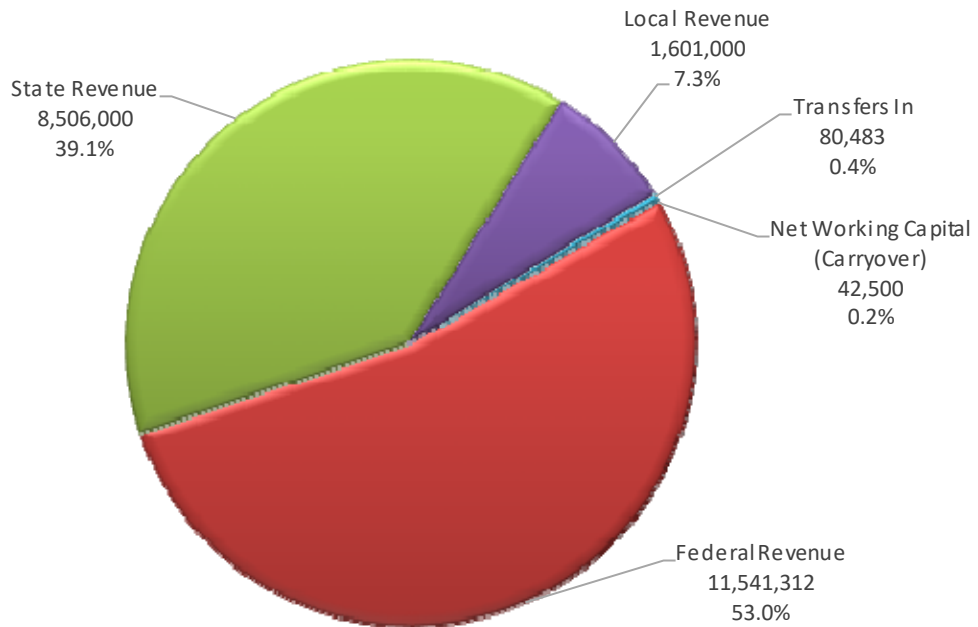
REQUIREMENTS

| FUND NUMBER AND NAME | ACTUAL | ACTUAL | CURRENT | PROPOSED | APPROVED | ADOPTED |
|------------------------------|------------------|-----------|---------------------|---------------------|---------------------|---------------------|
| | 2019-2020 | 2020-2021 | BUDGET 2021-2022 | BUDGET 2022-2023 | BUDGET 2022-2023 | BUDGET 2022-2023 |
| 61000 Food Services Fund | 937,763 | 0 | 0 | 0 | 0 | 0 |
| 62000 Bookstore Fund | 1,611,975 | 0 | 0 | 0 | 0 | 0 |
| 63000 Printing Services Fund | 401,395 | 0 | 0 | 0 | 0 | 0 |
| TOTAL REQUIREMENTS | 2,951,133 | 0 | 0 | 0 | 0 | 0 |

Prior year columns show actual revenues and expenditures for the fiscal year indicated. Net working capital and ending fund balance are not included. Budget year columns show estimated resources (including net working capital-carryover) and estimated requirements.

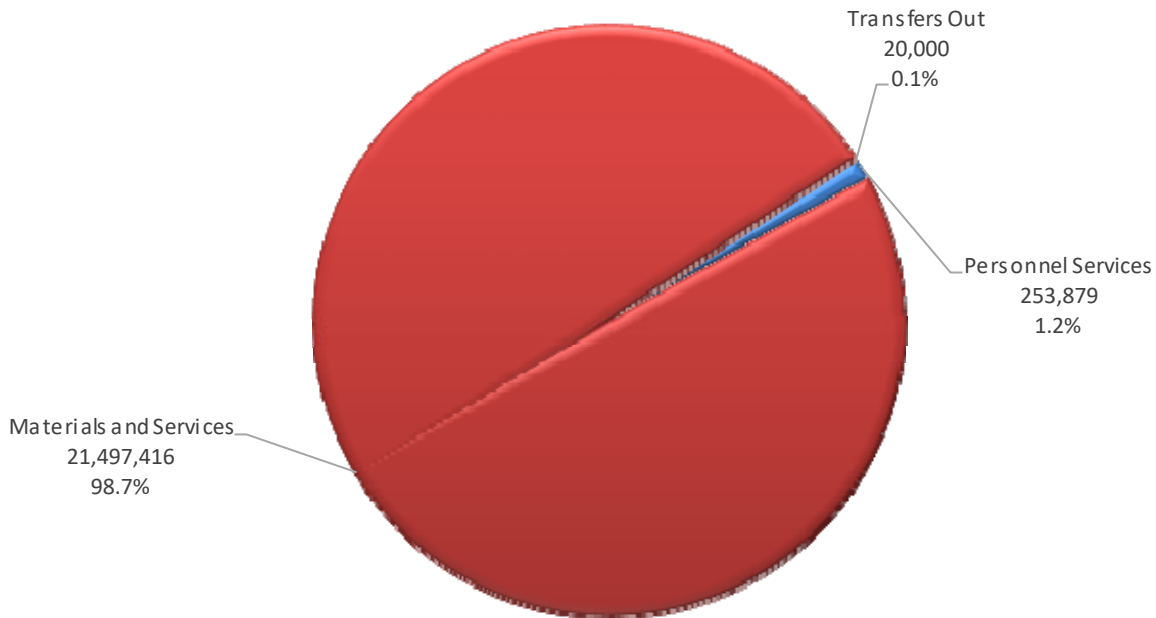
Financial Aid Fund Summary of Resources

| | <u>ACTUAL</u> <u>2019-2020</u> | <u>ACTUAL</u> <u>2020-2021</u> | <u>CURRENT</u> <u>BUDGET</u> <u>2021-2022</u> | <u>ADOPTED</u> <u>BUDGET</u> <u>2022-2023</u> |
|---------------------------------|-----------------------------------|-----------------------------------|---|---|
| Net Working Capital (Carryover) | \$ 114,826 | \$ 151,841 | \$ 52,500 | \$ 42,500 |
| Federal Revenue | 6,908,042 | 5,858,017 | 11,541,312 | 11,541,312 |
| State Revenue | 3,912,128 | 3,247,784 | 8,506,000 | 8,506,000 |
| Local Revenue | 1,352,452 | 1,228,961 | 1,578,500 | 1,601,000 |
| Transfers In | <u>29,969</u> | <u>16,493</u> | <u>227,733</u> | <u>80,483</u> |
| TOTAL RESOURCES | <u>\$ 12,317,417</u> | <u>\$ 10,503,096</u> | <u>\$ 21,906,045</u> | <u>\$ 21,771,295</u> |



Financial Aid Fund Summary of Requirements

| | ACTUAL 2019-2020 | ACTUAL 2020-2021 | CURRENT BUDGET 2021-2022 | ADOPTED BUDGET 2022-2023 |
|------------------------------------|-----------------------------|-----------------------------|--------------------------------|--------------------------------|
| Personnel Services | \$ 191,283 | \$ 52,009 | \$ 341,557 | \$ 253,879 |
| Materials and Services | 11,974,293 | 10,319,499 | 21,549,488 | 21,497,416 |
| Transfers Out | <u>0</u> | <u>0</u> | <u>15,000</u> | <u>20,000</u> |
| Sub-Total | 12,165,576 | 10,371,508 | 21,906,045 | 21,771,295 |
| Unappropriated Ending Fund Balance | <u>151,841</u> | <u>131,588</u> | <u>0</u> | <u>0</u> |
| TOTAL REQUIREMENTS | <u>\$ 12,317,417</u> | <u>\$ 10,503,096</u> | <u>\$ 21,906,045</u> | <u>\$ 21,771,295</u> |



Financial Aid Fund Summary by Use

| ACCOUNT | INST. INSTRUCTION | STUDENT SUPPORT | COMMUNITY SERVICES | COLLEGE SUPPORT | PLANT OPERATIONS | PLANT ADDITIONS | FINANCIAL AID/AGENCY | RESERVES | TOTAL |
|----------------------|----------------------|--------------------|-----------------------|--------------------|---------------------|--------------------|-------------------------|----------|------------|
| PERSONNEL EXPENSES | 0 | 0 | 0 | 0 | 0 | 0 | 253,293 | 0 | 253,293 |
| BENEFIT EXPENSES | 0 | 0 | 0 | 0 | 0 | 0 | 586 | 0 | 586 |
| MATERIALS & SERVICES | 0 | 0 | 0 | 0 | 0 | 0 | 65,496 | 0 | 65,496 |
| FINANCIAL AID | 0 | 0 | 0 | 10,000 | 0 | 0 | 21,421,920 | 0 | 21,431,920 |
| TRANSFERS OUT | 0 | 0 | 0 | 0 | 0 | 0 | 20,000 | 0 | 20,000 |
| | 0 | 0 | 0 | 10,000 | 0 | 0 | 21,761,295 | 0 | 21,771,295 |

Financial Aid Fund

Requirements by Major Program

| PROGRAM TYPE | ACTUAL | ACTUAL | CURRENT | | PROPOSED | | APPROVED | ADOPTED | |
|---------------------------------------|-------------------|-------------------|-------------------|---------------|-------------------|--------------|-------------------|-------------------|--------------|
| | 2019-2020 | 2020-2021 | BUDGET | FTE | BUDGET | FTE | BUDGET | BUDGET | FTE |
| 50000 COLLEGE SUPPORT SERVICES | | | | | | | | | |
| Personnel Services | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Materials & Services | 0 | 0 | 15,000 | n/a | 10,000 | n/a | 10,000 | 10,000 | n/a |
| Capital Outlay | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Transfers Out | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 0 | 0 | 15,000 | n/a | 10,000 | n/a | 10,000 | 10,000 | n/a |
| 75000 TRANSFERS | | | | | | | | | |
| Personnel Services | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Materials & Services | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Capital Outlay | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Transfers Out | 0 | 0 | 15,000 | n/a | 20,000 | n/a | 20,000 | 20,000 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 0 | 0 | 15,000 | n/a | 20,000 | n/a | 20,000 | 20,000 | n/a |
| 80000 FINANCIAL AID | | | | | | | | | |
| Personnel Services | 191,283 | 52,009 | 341,557 | 10.494 | 253,879 | 9.263 | 253,879 | 253,879 | 9.263 |
| Materials & Services | 11,974,293 | 10,319,499 | 21,534,488 | n/a | 21,487,416 | n/a | 21,487,416 | 21,487,416 | n/a |
| Capital Outlay | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Transfers Out | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 12,165,576 | 10,371,508 | 21,876,045 | 10.494 | 21,741,295 | 9.263 | 21,741,295 | 21,741,295 | 9.263 |
| TOTAL REQUIREMENTS | | | | | | | | | |
| Personnel Services | 191,283 | 52,009 | 341,557 | 10.494 | 253,879 | 9.263 | 253,879 | 253,879 | 9.263 |
| Materials & Services | 11,974,293 | 10,319,499 | 21,549,488 | n/a | 21,497,416 | n/a | 21,497,416 | 21,497,416 | n/a |
| Capital Outlay | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Transfers Out | 0 | 0 | 15,000 | n/a | 20,000 | n/a | 20,000 | 20,000 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| TOTAL PROGRAM REQUIREMENTS | 12,165,576 | 10,371,508 | 21,906,045 | 10.494 | 21,771,295 | 9.263 | 21,771,295 | 21,771,295 | 9.263 |

Financial Aid Fund

Summary of Resources and Requirements by Fund

RESOURCES

| | ACTUAL | ACTUAL | CURRENT | PROPOSED | APPROVED | ADOPTED |
|----------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| | 2019-2020 | 2020-2021 | BUDGET | BUDGET | BUDGET | BUDGET |
| | 2019-2020 | 2020-2021 | 2021-2022 | 2022-2023 | 2022-2023 | 2022-2023 |
| Federal Programs | 6,908,590 | 5,858,017 | 11,695,810 | 11,541,855 | 11,541,855 | 11,541,855 |
| State Programs | 3,912,128 | 3,247,784 | 8,506,000 | 8,506,000 | 8,506,000 | 8,506,000 |
| College Programs | 41,751 | 21,356 | 189,235 | 155,940 | 155,940 | 155,940 |
| LBCC Foundation Programs | 254,742 | 265,911 | 205,000 | 257,500 | 257,500 | 257,500 |
| Non-Institutional Programs | 1,085,380 | 958,187 | 1,310,000 | 1,310,000 | 1,310,000 | 1,310,000 |
| TOTAL RESOURCES | 12,202,591 | 10,351,255 | 21,906,045 | 21,771,295 | 21,771,295 | 21,771,295 |

REQUIREMENTS

| | ACTUAL | ACTUAL | CURRENT | PROPOSED | APPROVED | ADOPTED |
|----------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| | 2019-2020 | 2020-2021 | BUDGET | BUDGET | BUDGET | BUDGET |
| | 2019-2020 | 2020-2021 | 2021-2022 | 2022-2023 | 2022-2023 | 2022-2023 |
| Federal Programs | 6,894,252 | 5,858,746 | 11,695,810 | 11,541,855 | 11,541,855 | 11,541,855 |
| State Programs | 3,888,292 | 3,269,416 | 8,506,000 | 8,506,000 | 8,506,000 | 8,506,000 |
| College Programs | 39,680 | 21,699 | 189,235 | 155,940 | 155,940 | 155,940 |
| LBCC Foundation Programs | 259,192 | 269,943 | 205,000 | 257,500 | 257,500 | 257,500 |
| Non-Institutional Programs | 1,084,160 | 951,704 | 1,310,000 | 1,310,000 | 1,310,000 | 1,310,000 |
| TOTAL REQUIREMENTS | 12,165,576 | 10,371,508 | 21,906,045 | 21,771,295 | 21,771,295 | 21,771,295 |

Prior year columns show actual revenues and expenditures for the fiscal year indicated. Net working capital and ending fund balance are not included. Budget year columns show estimated resources (including net working capital-carryover) and estimated requirements.

Financial Aid Fund

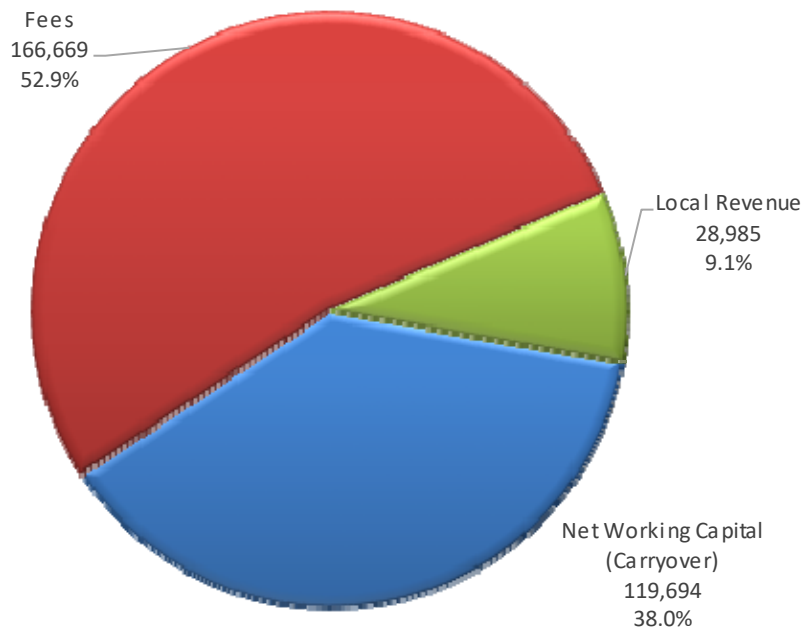
Resources and Requirements by Fund

| RESOURCES | | | | | | |
|---|---------------------|---------------------|--------------------------------|---------------------------------|---------------------------------|--------------------------------|
| FUND NUMBER AND NAME | ACTUAL 2019-2020 | ACTUAL 2020-2021 | CURRENT BUDGET 2021-2022 | PROPOSED BUDGET 2022-2023 | APPROVED BUDGET 2022-2023 | ADOPTED BUDGET 2022-2023 |
| 8111X Pell Grants | 6,443,696 | 5,420,254 | 11,080,000 | 11,080,000 | 11,080,000 | 11,080,000 |
| 8112X SEOG Grants | 264,075 | 385,914 | 263,307 | 197,480 | 197,480 | 197,480 |
| 8114X Federal Work Study | 200,819 | 51,849 | 352,503 | 264,375 | 264,375 | 264,375 |
| 8210X OSAC Need Grants | 1,855,800 | 1,840,888 | 4,506,000 | 4,506,000 | 4,506,000 | 4,506,000 |
| 8230X Oregon Promise | 2,056,328 | 1,391,338 | 4,000,000 | 4,000,000 | 4,000,000 | 4,000,000 |
| 82400 Oregon Supp Need Based Aid | 0 | 15,558 | 0 | 0 | 0 | 0 |
| 83120 Dean Grants | 29,421 | 15,914 | 35,735 | 42,440 | 42,440 | 42,440 |
| 83130 Foundation Scholarships-Specific | 252,742 | 247,911 | 200,000 | 250,000 | 250,000 | 250,000 |
| 83210 Eldon Schafer Loans | 160 | 0 | 48,500 | 48,500 | 48,500 | 48,500 |
| 83220 Local Work Study | 0 | 105 | 4,500 | 4,500 | 4,500 | 4,500 |
| 83225 International Student Employment | 0 | 474 | 3,000 | 3,000 | 3,000 | 3,000 |
| 83240 Institut. Reconciliation Receivable | 13,341 | 4,499 | 65,000 | 30,000 | 30,000 | 30,000 |
| 83250 Institut. Reconciliation Write Offs | 0 | 0 | 17,500 | 12,500 | 12,500 | 12,500 |
| 83260 Other Collection Costs Fund | (1,171) | 364 | 15,000 | 15,000 | 15,000 | 15,000 |
| 83400 PELL Administration Fee | (3,024) | 0 | 10,000 | 10,000 | 10,000 | 10,000 |
| 84100 Non-Institutional Grants | 1,088,404 | 958,187 | 1,300,000 | 1,300,000 | 1,300,000 | 1,300,000 |
| 85410 Libby Endowment Scholarship | 2,000 | 18,000 | 5,000 | 7,500 | 7,500 | 7,500 |
| TOTAL RESOURCES | 12,202,591 | 10,351,255 | 21,906,045 | 21,771,295 | 21,771,295 | 21,771,295 |

| REQUIREMENTS | | | | | | |
|---|---------------------|---------------------|--------------------------------|---------------------------------|---------------------------------|--------------------------------|
| FUND NUMBER AND NAME | ACTUAL 2019-2020 | ACTUAL 2020-2021 | CURRENT BUDGET 2021-2022 | PROPOSED BUDGET 2022-2023 | APPROVED BUDGET 2022-2023 | ADOPTED BUDGET 2022-2023 |
| 8111X Pell Grants | 6,429,357 | 5,420,824 | 11,080,000 | 11,080,000 | 11,080,000 | 11,080,000 |
| 8112X SEOG Grants | 264,075 | 385,914 | 263,307 | 197,480 | 197,480 | 197,480 |
| 8114X Federal Work Study | 200,820 | 52,008 | 352,503 | 264,375 | 264,375 | 264,375 |
| 8210X OSAC Opportunity Grants | 1,855,800 | 1,839,731 | 4,506,000 | 4,506,000 | 4,506,000 | 4,506,000 |
| 8230X Oregon Promise | 2,032,492 | 1,414,127 | 4,000,000 | 4,000,000 | 4,000,000 | 4,000,000 |
| 82400 Oregon Supp Need Based Aid | 0 | 15,558 | 0 | 0 | 0 | 0 |
| 83120 Dean Grants | 20,047 | 11,204 | 35,735 | 42,440 | 42,440 | 42,440 |
| 83130 Foundation Scholarships-Specific | 254,692 | 251,943 | 200,000 | 250,000 | 250,000 | 250,000 |
| 83210 Eldon Schafer Loans | 0 | 0 | 48,500 | 48,500 | 48,500 | 48,500 |
| 83220 Local Work Study | 0 | 0 | 4,500 | 4,500 | 4,500 | 4,500 |
| 83225 International Student Employment | 0 | 0 | 3,000 | 3,000 | 3,000 | 3,000 |
| 83240 Institut. Reconciliation Receivable | 12,292 | 4,434 | 65,000 | 30,000 | 30,000 | 30,000 |
| 83250 Institut. Reconciliation Write Offs | 7,341 | 6,061 | 17,500 | 12,500 | 12,500 | 12,500 |
| 83260 Other Collection Costs Fund | 0 | 0 | 15,000 | 15,000 | 15,000 | 15,000 |
| 83400 PELL Administration Fee | 0 | 0 | 10,000 | 10,000 | 10,000 | 10,000 |
| 84100 Non-Institutional Grants | 1,084,160 | 951,704 | 1,300,000 | 1,300,000 | 1,300,000 | 1,300,000 |
| 85410 Libby Endowment Scholarship | 4,500 | 18,000 | 5,000 | 7,500 | 7,500 | 7,500 |
| TOTAL REQUIREMENTS | 12,165,576 | 10,371,508 | 21,906,045 | 21,771,295 | 21,771,295 | 21,771,295 |

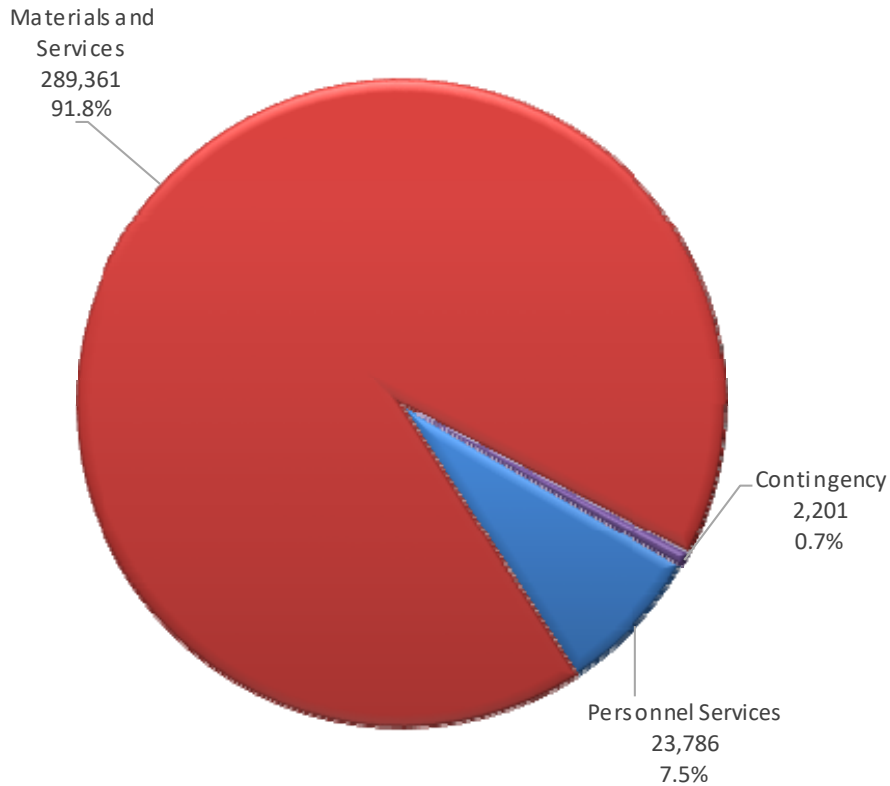
Agency Fund Summary of Resources

| | ACTUAL 2019-2020 | ACTUAL 2020-2021 | CURRENT BUDGET 2021-2022 | ADOPTED BUDGET 2022-2023 |
|---------------------------------|--------------------------|--------------------------|--------------------------------|--------------------------------|
| Net Working Capital (Carryover) | \$ 205,476 | \$ 224,285 | \$ 206,831 | \$ 119,694 |
| Fees | 127,036 | 112,994 | 166,669 | 166,669 |
| Local Revenue | 2,672 | 7,823 | 28,911 | 28,985 |
| Other Revenue | 728 | 0 | 0 | 0 |
| Transfers In | <u>0</u> | <u>0</u> | <u>150,236</u> | <u>0</u> |
| TOTAL RESOURCES | <u>\$ 335,912</u> | <u>\$ 345,102</u> | <u>\$ 552,647</u> | <u>\$ 315,348</u> |



Agency Fund Summary of Requirements

| | ACTUAL <u>2019-2020</u> | ACTUAL <u>2020-2021</u> | CURRENT BUDGET <u>2021-2022</u> | ADOPTED BUDGET <u>2022-2023</u> |
|------------------------------------|----------------------------|----------------------------|---------------------------------------|---------------------------------------|
| Personnel Services | \$ 527 | \$ 11,863 | \$ 23,775 | \$ 23,786 |
| Materials and Services | 111,100 | 156,478 | 340,435 | 289,361 |
| Transfers Out | 0 | 0 | 150,236 | 0 |
| Contingency | <u>0</u> | <u>0</u> | <u>38,201</u> | <u>2,201</u> |
| Sub-Total | 111,627 | 168,341 | 552,647 | 315,348 |
| Unappropriated Ending Fund Balance | <u>224,285</u> | <u>176,761</u> | <u>0</u> | <u>0</u> |
| TOTAL REQUIREMENTS | <u><u>\$ 335,912</u></u> | <u><u>\$ 345,102</u></u> | <u><u>\$ 552,647</u></u> | <u><u>\$ 315,348</u></u> |



Agency Fund Summary by Use

| ACCOUNT | INSTRUCTION | COLLEGE | | | | | | | RESERVES | TOTAL |
|----------------------|-------------|---------------|------------------|--------------------|------------------|------------------|-----------------|-----------|----------|---------|
| | | INST. SUPPORT | STUDENT SERVICES | COMMUNITY SERVICES | SUPPORT SERVICES | PLANT OPERATIONS | PLANT ADDITIONS | TRANSFERS | | |
| PERSONNEL EXPENSES | 0 | 0 | 22,109 | 0 | 0 | 0 | 0 | 0 | 0 | 22,109 |
| BENEFIT EXPENSES | 0 | 0 | 1,677 | 0 | 0 | 0 | 0 | 0 | 0 | 1,677 |
| MATERIALS & SERVICES | 0 | 0 | 206,161 | 0 | 0 | 0 | 0 | 3,200 | 0 | 209,361 |
| FINANCIAL AID | 0 | 0 | 80,000 | 0 | 0 | 0 | 0 | 0 | 0 | 80,000 |
| CONTINGENCY EXPENSE | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2,201 | 2,201 |
| TRANSFERS OUT | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | 0 | 0 | 309,947 | 0 | 0 | 0 | 0 | 3,200 | 2,201 | 315,348 |

Agency Fund

Requirements by Major Program

| PROGRAM TYPE | ACTUAL | ACTUAL | CURRENT | | PROPOSED | | APPROVED | ADOPTED | |
|-------------------------------------|----------------|----------------|----------------|--------------|----------------|--------------|----------------|----------------|--------------|
| | 2019-2020 | 2020-2021 | BUDGET | FTE | BUDGET | FTE | BUDGET | BUDGET | FTE |
| 20000 INSTRUCTIONAL SUPPORT | | | | | | | | | |
| Personnel Services | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Materials & Services | 1,157 | 0 | 3,200 | n/a | 0 | n/a | 0 | 0 | n/a |
| Capital Outlay | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Transfers Out | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 1,157 | 0 | 3,200 | n/a | 0 | n/a | 0 | 0 | n/a |
| 30000 STUDENT SERVICES | | | | | | | | | |
| Personnel Services | 527 | 11,861 | 23,775 | 0.298 | 23,786 | 0.266 | 23,786 | 23,786 | 0.266 |
| Materials & Services | 109,943 | 156,480 | 337,235 | n/a | 289,361 | n/a | 289,361 | 289,361 | n/a |
| Capital Outlay | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Transfers Out | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 110,470 | 168,341 | 361,010 | 0.298 | 313,147 | 0.266 | 313,147 | 313,147 | 0.266 |
| 75000 TRANSFERS | | | | | | | | | |
| Personnel Services | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Materials & Services | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Capital Outlay | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Transfers Out | 0 | 0 | 150,236 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Total Program Requirements | 0 | 0 | 150,236 | n/a | 0 | n/a | 0 | 0 | n/a |
| 90000 RESERVES (CONTINGENCY) | | | | | | | | | |
| Personnel Services | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Materials & Services | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Capital Outlay | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Transfers Out | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 38,201 | n/a | 2,201 | n/a | 2,201 | 2,201 | n/a |
| Total Program Requirements | 0 | 0 | 38,201 | n/a | 2,201 | n/a | 2,201 | 2,201 | n/a |
| TOTAL REQUIREMENTS | | | | | | | | | |
| Personnel Services | 527 | 11,861 | 23,775 | 0.298 | 23,786 | 0.266 | 23,786 | 23,786 | 0.266 |
| Materials & Services | 111,100 | 156,480 | 340,435 | n/a | 289,361 | n/a | 289,361 | 289,361 | n/a |
| Capital Outlay | 0 | 0 | 0 | n/a | 0 | n/a | 0 | 0 | n/a |
| Transfers Out | 0 | 0 | 150,236 | n/a | 0 | n/a | 0 | 0 | n/a |
| Contingency/Unapp.End.Fund.Bal | 0 | 0 | 38,201 | n/a | 2,201 | n/a | 2,201 | 2,201 | n/a |
| TOTAL PROGRAM REQUIREMENTS | 111,627 | 168,341 | 552,647 | 0.298 | 315,348 | 0.266 | 315,348 | 315,348 | 0.266 |

Prior year columns show actual revenues and expenditures for the fiscal year indicated. Net working capital and ending fund balance are not included. Budget year columns show estimated resources (including net working capital-carryover) and estimated requirements.

Agency Fund Summary of Funds

RESOURCES

| | ACTUAL 2019-2020 | ACTUAL 2020-2021 | CURRENT BUDGET 2021-2022 | PROPOSED BUDGET 2022-2023 | APPROVED BUDGET 2022-2023 | ADOPTED BUDGET 2022-2023 |
|-------------------------------|---------------------|---------------------|--------------------------------|---------------------------------|---------------------------------|--------------------------------|
| Assoc. Students of LBCC | 126,199 | 114,300 | 498,813 | 263,188 | 263,188 | 263,188 |
| Oregon Comm. College Dean's A | 1,480 | 0 | 3,200 | 3,200 | 3,200 | 3,200 |
| Student Clubs | 2,757 | 6,517 | 50,634 | 48,960 | 48,960 | 48,960 |
| TOTAL RESOURCES | 130,436 | 120,817 | 552,647 | 315,348 | 315,348 | 315,348 |

REQUIREMENTS

| | ACTUAL 2019-2020 | ACTUAL 2020-2021 | CURRENT BUDGET 2021-2022 | PROPOSED BUDGET 2022-2023 | APPROVED BUDGET 2022-2023 | ADOPTED BUDGET 2022-2023 |
|-------------------------------|---------------------|---------------------|--------------------------------|---------------------------------|---------------------------------|--------------------------------|
| Assoc. Students of LBCC | 99,119 | 164,578 | 498,813 | 263,188 | 263,188 | 263,188 |
| Oregon Comm. College Dean's A | 1,157 | 0 | 3,200 | 3,200 | 3,200 | 3,200 |
| Student Clubs | 11,351 | 3,763 | 50,634 | 48,960 | 48,960 | 48,960 |
| TOTAL REQUIREMENTS | 111,627 | 168,341 | 552,647 | 315,348 | 315,348 | 315,348 |

Budget Calendar

| DATE | EVENT | PARTICIPANTS |
|---------------------|---|---|
| Jul 21, 2021 | Appoint Budget Officer | Board of Education |
| Nov 9 & 10, 2021 | Budget Forums | Campus Wide |
| Nov 17, 2021 | Approve Budget Calendar | Board of Education/ Budget Committee |
| Dec 01, 2021 | Submit new budget requests. | Vice Presidents/ Budget Team |
| Dec 6-13, 2021 | Individual Budget Manager meetings with Budget Team | Deans/Directors |
| Dec 10, 2021 | Distribute budget forms and Information Guide to divisions | Budget Officer |
| January & February | Two Student Forums scheduled to discuss budget and tuition | Students |
| Jan 19, 2022 | Initial Budget Discussion | Board of Education |
| Jan 19, 2022 | DRAFT budget to Business Office | Vice Presidents |
| Feb 16, 2022 | Tuition and general fees discussion | Board of Education |
| Mar 01, 2022 | Updated PROPOSED budget to Deans/Directors | Budget Officer |
| Mar 16, 2022 | Tuition and general fees decision | Board of Education |
| Mar 22, 2022 | Updated PROPOSED budget to Business Office | Vice Presidents |
| April | Conduct three (3) Budget Information Forums for campus community | Budget Officer |
| Apr 07, 2022 | PROPOSED budget to College Council | College Council |
| Apr 15, 2022 | PROPOSED budget to printer | Budget Officer |
| Apr 20, 2022 | PUBLISH NOTICE OF BUDGET COMMITTEE MEETINGS IN NEWSPAPER/POST TO WEBSITE | Budget Officer/Board Secretary |
| Apr 27, 2022 | PROPOSED budget to Budget Committee | Budget Officer |
| May 11, 2022 | Public Budget Committee Meeting/election of officers/budget message presented/presentation of PROPOSED | Budget Committee/ President/Budget Officer |
| May 18, 2022 | Public Budget Committee Meeting/discussion and approval | Budget Committee/ President/Budget Officer |
| May 31, 2022 | ADOPTED budget to printer | Budget Officer |
| Jun 01, 2022 | PUBLISH BUDGET SUMMARY OF APPROVED BUDGET & NOTICE OF BUDGET HEARING | Budget Officer/Board Secretary |
| Jun 15, 2022 | Public Budget Hearing/Budget ADOPTED/appropriations made/tax levy declared | Board of Education |
| Jul 15, 2022 | NOTICE OF TAX LEVY TO COUNTY ASSESSOR | Budget Officer |

Bold print denotes public budget meeting/hearing.

***NOTE:** Strategic Initiative Fund requests may be submitted throughout the year via the appropriate Council.

Glossary

Academic Year- The beginning of summer term through spring term.

Accreditation - A voluntary, self-regulatory process by a postsecondary regional accrediting agency that qualifies institutions and enrollment students for access to federal funds to support teaching, research, and student financial aid.

Adopted Budget - The financial plan adopted by the governing body (LBCC Board of Education) which forms a basis for appropriations.

Agency Fund - A trust and agency fund used to account for assets held by a government unit in a trustee capacity or as an agent for individuals, private organizations, other government units and/or other funds.

Appropriation - Authorization for spending a specific amount of money for a specific purpose during a specific period of time. Based on the adopted budget, including supplemental budgets, if any. Presented in a resolution adopted by the governing body.

Assessed Value - The value set on real and personal property as a basis for imposing taxes. It is the lesser of the property's maximum assessed value or real market value.

Biennium – A two-year period.

Board - The Board of Education of Linn-Benton Community College consisting of seven elected citizens.

Budget - Written report showing the college's comprehensive financial plan for one fiscal year. Must include a balanced statement of actual revenues and expenditures during each of the last two years, and estimated revenues and expenditures for the current and upcoming year.

Budget Committee - Fiscal planning board of the college, consisting of the governing body plus an equal number of legal voters from the district.

Budget Message - Written explanation of the budget and local government's financial priorities. Prepared by or under the direction of the executive officer or chairperson of the governing body.

Budget Officer - Person appointed by the governing body to assemble budget material and information and to physically prepare the proposed budget.

Capital Outlay - Items with a cost of \$5,000 or more per unit and a useful life of two or more years, such as machinery, land, furniture, equipment, or buildings.

Cash Basis - A basis of accounting under which transactions are recognized only in the period during which cash is received or disbursed.

College Support Services - Programs and activities related to institutional support including but not limited to executive management, fiscal operations, general administration and logistical services, administrative computing support, public relations and development, human resources activities and auxiliary enterprise operations.

Contingency - Special amount set aside in the upcoming year for unforeseen expenses. Designated contingencies are funds to be set aside for a specific purpose, such as payroll or Board restricted funds.

Debt Service Fund - A fund established to account for payment of general long-term debt principal and interest.

Enterprise Fund - A fund established to account for operations that are financed and operated in a manner similar to private business enterprises. The cost of providing goods or services on a continuing basis are financed or recovered primarily through user charges and fees.

Expenditure - Decreases in net financial resources if accounts are kept on an accrual or modified accrual basis; total amount paid if accounts are kept on a cash basis.

Fiscal Year - A twelve month period commencing on July 1 and closing on June 30 for local governments.

Full-Time Equivalent (FTE) Student - A student or combination of several students who carry among them, within a single academic year, a minimum number of clock hours of instruction, in any program. For the purpose of receiving state reimbursement, it means a student who carries 510 clock hours over three (3) terms of instruction. As used in budgeting for the number of employees, FTE means full-time equivalent position.

Fund - A fiscal and accounting entity with self-balancing accounts to record cash and other financial resources, related liabilities, balances and changes, all segregated for specific, regulated activities and objectives.

Fund Balance - The excess of the assets of a fund over its liabilities and reserves except in the case of funds subject to budgetary accounting where, prior to the end of a fiscal period, it represents the excess of the fund's assets and estimated revenues over its liabilities, reserves and appropriations for the period.

General Fund - Primary operating fund of the college with major sources of revenue from state support, local property tax and tuition.

Grant - A donation or contribution of cash by a third party.

Instruction - Techniques or procedures used to conduct learning activities. For budgetary purposes, it includes, but is not limited to, expenditures relating to the salary and benefits of instructors, instructional supplies, teaching aides, references and methods of testing and evaluation.

Instructional Support Services - Activities and programs that support instruction. It includes, but is not limited to, administrative support, supplies and equipment, and office space.

Materials and Services (M&S) - Includes contractual and other services, materials, supplies, and other charges.

Modified Accrual Basis - The accrual basis of accounting adapted to the governmental fund-type measurement focus. Under this basis of accounting, revenues and other financial resource increments, such as bond proceeds, are recognized when they become susceptible to accrual, that is, when they become both measurable and available to finance expenditures in the current period.

Organizational Unit - Any administrative subdivision of the college, especially one charged with carrying on one or more specific functions (such as a department, office, or division).

PERS – Public Employees Retirement System in which participating members must make mandatory contributions on behalf of employees.

Personal Services - All salaries, fringe benefits, and miscellaneous costs associated with salary expenditures.

Plant Operations/Maintenance - Programs and activities that are directly associated in providing operation and maintenance of college facilities including, but not limited to, physical plant administration, building maintenance, custodial services, utilities, landscape and ground maintenance.

Property Taxes - Amounts imposed on taxable property by a local government within its operation rate limit, levied under local option authority, or levied to repay bonded debt.

Proposed Budget - Financial and operation plan prepared by the budget officer submitted to the public and budget committee for review.

Rate Limit - A district's permanent ad valorem property tax rate for operating purposes. This rate levied against the assessed value of property raises taxes for general operations.

Resolution - A formal order of a governing body.

Resources - Estimated beginning funds on hand at the beginning of the fiscal year, plus anticipated receipts.

Revenue - The gross receipts and receivables derived from taxes, tuition fees, state aid and other sources.

Special Revenue Fund - A fund authorized and used to account for the proceeds of specific revenue sources (other than special assessments, expendable trusts, or major capital projects) that are legally restricted to expenditure for specific purposes.

Student Support Services - Programs and activities that support student needs including, but not limited to, student services administration, social and cultural development, disability services, counseling and career guidance, financial aid administration, admission, student records, intramurals and athletics and student organizations.

Supplemental Budget - Prepared to meet unexpected needs or to spend revenues not anticipated at time regular budget was adopted. Cannot be used to authorize a tax levy.

Transfers - Amounts distributed from one fund to finance activities in another fund. Shown as a requirement in the originating fund and revenue in the receiving fund.

FORM CC-1

NOTICE OF BUDGET HEARING

A public meeting of the Linn-Benton Community College Board of Education will be held on June 27, 2022 at 4:00 pm. The purpose of this meeting is to discuss the budget for the fiscal year beginning July 1, 2022 as approved by the Linn-Benton Community College District Budget Committee. A summary of the budget is presented below. Information on how to attend the budget meeting can be found on the college website: www.linnbenton.edu. This budget is for an annual budget period. This budget was prepared on a basis of accounting that is the same as the basis of accounting used during the preceding year. If different, the major changes and their effect on the budget are:

Contact: Jess Jacobs Telephone: 541-917-4324 Email: jacobsj@linnbenton.edu

FINANCIAL SUMMARY - RESOURCES

| TOTAL OF ALL FUNDS | Actual Amount Last Year 2020-21 | Adopted Budget This Year 2021-22 | Approved Budget Next Year 2022-23 |
|--|------------------------------------|-------------------------------------|--------------------------------------|
| Beginning Fund Balance | 17,223,710 | 29,322,669 | 25,119,332 |
| Current Year Property Taxes, other than Local Option Taxes | 12,441,691 | 12,674,600 | 14,380,552 |
| Current Year Local Option Property Taxes | 0 | 0 | 0 |
| Tuition and Fees | 21,318,450 | 27,108,197 | 21,652,670 |
| Other Revenue from Local Sources | 17,486,593 | 14,100,614 | 31,680,540 |
| Revenue from State Sources | 29,386,215 | 36,885,656 | 37,760,368 |
| Revenue from Federal Sources | 21,088,312 | 26,602,028 | 17,238,566 |
| Interfund Transfers | 2,504,965 | 2,573,932 | 4,520,876 |
| All Other Budget Resources | 0 | 0 | 0 |
| Total Resources | \$121,449,936 | \$149,267,696 | \$152,352,904 |

FINANCIAL SUMMARY - REQUIREMENTS BY OBJECT CLASSIFICATION

| | Actual Amount Last Year 2020-21 | Adopted Budget This Year 2021-22 | Approved Budget Next Year 2022-23 |
|---|------------------------------------|-------------------------------------|--------------------------------------|
| Personnel Services | 52,753,383 | 60,379,745 | 62,895,751 |
| Materials & Services | 29,908,082 | 54,541,936 | 50,122,927 |
| Capital Outlay | 5,836,817 | 14,866,645 | 20,661,106 |
| Debt Service | 6,643,024 | 7,240,131 | 8,756,066 |
| Interfund Transfers | 2,081,062 | 2,573,932 | 4,520,876 |
| Operating Contingency | 0 | 9,665,307 | 5,396,178 |
| All Other Expenditures | 0 | 0 | 0 |
| Unappropriated Ending Fund Balance & Reserves | 24,227,568 | 0 | 0 |
| Total Requirements | \$121,449,936 | \$149,267,696 | \$152,352,904 |

FINANCIAL SUMMARY--REQUIREMENTS AND FULL TIME EQUIVALENT EMPLOYEES (FTE) BY FUNCTION

| | Actual Amount Last Year 2020-21 | Adopted Budget This Year 2021-22 | Approved Budget Next Year 2022-23 |
|---|------------------------------------|-------------------------------------|--------------------------------------|
| Instruction | 28,542,353 | 30,851,949 | 32,458,701 |
| FTE | | 279,438 | 273,859 |
| Instructional Support | 13,334,821 | 20,726,661 | 23,466,836 |
| FTE | | 160,225 | 170,878 |
| Student Services | 7,837,124 | 12,281,567 | 11,989,106 |
| FTE | | 87,260 | 85,435 |
| Student Loans and Financial Aid | 12,731,543 | 27,404,639 | 22,241,295 |
| FTE | | 10,494 | 9,263 |
| Community Services | 192,400 | 200,000 | 200,000 |
| FTE | | 0,000 | 0,000 |
| College Support Services | 23,543,584 | 29,196,243 | 30,466,987 |
| FTE | | 102,609 | 87,536 |
| Plant Additions | 5,446,130 | 12,145,000 | 17,025,000 |
| FTE | | 0,000 | 0,000 |
| Plant Operations | 3,513,351 | 4,222,398 | 4,587,925 |
| FTE | | 12,260 | 13,234 |
| Interfund Transfers | 2,081,062 | 2,573,932 | 4,520,876 |
| Debt Service | 0 | 0,000 | 0,000 |
| Operating Contingency | 0 | 9,665,307 | 5,396,178 |
| Unappropriated Ending Fund Balance and Reserves | 24,227,568 | 0 | 0 |
| Total Requirements | \$121,449,936 | \$149,267,696 | \$152,352,904 |
| Total FTE | 0 | 652,286 | 640,205 |

STATEMENT OF CHANGES IN ACTIVITIES and SOURCES OF FINANCING *

| |
|--|
| |
|--|

PROPERTY TAX LEVIES

| | Rate or Amount Imposed | Rate or Amount Imposed | Rate or Amount Approved |
|--|------------------------|------------------------|-------------------------|
| Permanent Rate Levy (Rate Limit .5019 per \$1,000) | 0.5019 | 0.5019 | 0.5019 |
| Local Option Levy | 0 | 0 | 0 |
| Levy For General Obligation Bonds | 3,266,329 | 3,329,578 | 3,427,368 |

STATEMENT OF INDEBTEDNESS

| LONG TERM DEBT | Estimated Debt Outstanding July 1, 2022 | Estimated Debt Authorized, But Not Incurred July 1, 2022 |
|--------------------------|--|---|
| General Obligation Bonds | 0 | 0 |
| Other Bonds | 0 | 0 |
| Other Borrowings | 0 | 0 |
| Total | \$0 | \$0 |

| DATE | EVENT | PARTICIPANTS |
|---------------------|---|---|
| Jul 21, 2021 | Appoint Budget Officer | Board of Education |
| Nov 9 & 10, 2021 | Budget Forums | Campus Wide |
| Nov 17, 2021 | Approve Budget Calendar | Board of Education/ Budget Committee |
| Dec 01, 2021 | Submit new budget requests. | Vice Presidents/ Budget Team |
| Dec 6-13, 2021 | Individual Budget Manager meetings with Budget Team | Deans/Directors |
| Dec 10, 2021 | Distribute budget forms and Information Guide to divisions | Budget Officer |
| January & February | Two Student Forums scheduled to discuss budget and tuition | Students |
| Jan 19, 2022 | Initial Budget Discussion | Board of Education |
| Jan 19, 2022 | DRAFT budget to Business Office | Vice Presidents |
| Feb 16, 2022 | Tuition and general fees discussion | Board of Education |
| Mar 01, 2022 | Updated PROPOSED budget to Deans/Directors | Budget Officer |
| Mar 16, 2022 | Tuition and general fees decision | Board of Education |
| Mar 22, 2022 | Updated PROPOSED budget to Business Office | Vice Presidents |
| April | Conduct three (3) Budget Information Forums for campus community | Budget Officer |
| Apr 07, 2022 | PROPOSED budget to College Council | College Council |
| Apr 15, 2022 | PROPOSED budget to printer | Budget Officer |
| Apr 20, 2022 | PUBLISH NOTICE OF BUDGET COMMITTEE MEETINGS IN NEWSPAPER/POST TO WEBSITE | Budget Officer/Board Secretary |
| Apr 27, 2022 | PROPOSED budget to Budget Committee | Budget Officer |
| May 11, 2022 | Public Budget Committee Meeting/election of officers/budget message presented/presentation of PROPOSED budget/discussion | Budget Committee/ President/Budget Officer |
| May 18, 2022 | Public Budget Committee Meeting/discussion and approval | Budget Committee/ President/Budget Officer |
| May 31, 2022 | ADOPTED budget to printer | Budget Officer |
| Jun 01, 2022 | PUBLISH BUDGET SUMMARY OF APPROVED BUDGET & NOTICE OF BUDGET HEARING | Budget Officer/Board Secretary |
| Jun 15, 2022 | Public Budget Hearing/Budget ADOPTED/appropriations made/tax levy declared | Board of Education |
| Jul 15, 2022 | NOTICE OF TAX LEVY TO COUNTY ASSESSOR | Budget Officer |

Bold print denotes public budget meeting/hearing.

***NOTE:** Strategic Initiative Fund requests may be submitted throughout the year via the appropriate Council.

**LINN-BENTON COMMUNITY
COLLEGE FOUNDATION**
(an Oregon not-for-profit corporation)
ANNUAL FINANCIAL REPORT
December 31, 2020 and 2019

**LINN-BENTON COMMUNITY COLLEGE FOUNDATION
BOARD OF TRUSTEES
2020**

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LINN-BENTON COMMUNITY COLLEGE FOUNDATION
(an Oregon not-for-profit corporation)

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FINANCIAL SECTION

KENNETH KUHNS & CO.
CERTIFIED PUBLIC ACCOUNTANTS
570 LIBERTY STREET S.E., SUITE 210
SALEM OREGON 97301-3594
TELEPHONE (503) 585-2550

INDEPENDENT AUDITOR'S REPORT

October 29, 2021

Board of Trustees
Linn-Benton Community College Foundation
Albany, Oregon

We have audited the accompanying financial statements of Linn-Benton Community College Foundation (an Oregon not-for-profit corporation), which comprise the statements of financial position as of December 31, 2020 and 2019, and the related statements of activities, functional expenses and cash flows for the years then ended, and the related notes to the financial statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditor's Responsibility

Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audits to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Linn-Benton Community College Foundation as of December 31, 2020 and 2019, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Kenneth Kuhns & Co.

Kenneth Kuhns & Co.

BASIC FINANCIAL STATEMENTS

LINN-BENTON COMMUNITY COLLEGE FOUNDATION
(an Oregon not-for-profit corporation)

STATEMENTS OF FINANCIAL POSITION

December 31, 2020 and 2019

| | 2020 | 2019 |
|--|----------------------|----------------------|
| ASSETS | | |
| Cash and cash equivalents | \$ 422,630 | \$ 1,015,879 |
| Pledges receivable | 10,114 | 15,114 |
| Loans receivable, net of allowance | - | - |
| Prepaid expenses | 9,536 | 2,100 |
| Investments | 10,790,898 | 9,183,265 |
| Beneficial interest in assets held by The Oregon Community Foundation | 288,681 | 270,349 |
| Property and equipment | 577,619 | 581,891 |
| TOTAL ASSETS | \$ 12,099,478 | \$ 11,068,598 |
| LIABILITIES | | |
| Accounts payable | \$ 326,247 | \$ 188,390 |
| Obligations under split-interest agreements | 17,249 | 18,516 |
| TOTAL LIABILITIES | 343,496 | 206,906 |
| NET ASSETS | | |
| Without donor restrictions | 2,225,121 | 2,093,955 |
| With donor restrictions | 9,530,861 | 8,767,737 |
| TOTAL NET ASSETS | 11,755,982 | 10,861,692 |
| TOTAL LIABILITIES AND NET ASSETS | \$ 12,099,478 | \$ 11,068,598 |

The accompanying notes are an integral part of these financial statements.

LINN-BENTON COMMUNITY COLLEGE FOUNDATION

(an Oregon not-for-profit corporation)

STATEMENTS OF ACTIVITIES

For the Years Ended December 31, 2020 and 2019

| | 2020 | | |
|---|-------------------------------|----------------------------|----------------------|
| | Without Donor Restrictions | With Donor Restrictions | Totals |
| REVENUES AND OTHER SUPPORT | | | |
| Contributions | | | |
| Cash, stock and receivables | \$ 164,710 | \$ 369,271 | \$ 533,981 |
| Interest on loans | - | - | - |
| Interest on checking account | 652 | - | 652 |
| Dividends | 83,872 | 197,542 | 281,414 |
| Fundraising | 6,195 | 26,526 | 32,721 |
| Grant revenue | - | 16,000 | 16,000 |
| Rental property | 8,786 | 2,929 | 11,715 |
| In-kind contributions | 193,062 | - | 193,062 |
| In-kind program contributions | 260 | 143,757 | 144,017 |
| Other revenue | 7,225 | 3,748 | 10,973 |
| Realized gain on investments | 26,880 | 66,323 | 93,203 |
| Unrealized gain on investments | 198,476 | 482,677 | 681,153 |
| Change in beneficial interest in assets held by The Oregon Community Foundation | - | 18,331 | 18,331 |
| Distribution of investment return earned on assets held by The Oregon Community Foundation | - | 10,861 | 10,861 |
| Change in value of split-interest agreements | - | (603) | (603) |
| Recovery of bad debts | - | - | - |
| Net assets released from restrictions for general administration | 64,327 | (64,327) | - |
| Net assets released from restrictions for scholarships and program activities | 509,911 | (509,911) | - |
| | 1,264,356 | 763,124 | 2,027,480 |
| TOTAL REVENUES AND OTHER SUPPORT | | | |
| EXPENSES AND LOSSES | | | |
| Program services | 588,090 | - | 588,090 |
| Supporting services | | | |
| Management and general | 530,099 | - | 530,099 |
| Fundraising | 15,001 | - | 15,001 |
| Realized loss on disposition of fixed assets | - | - | - |
| | 1,133,190 | - | 1,133,190 |
| TOTAL EXPENSES AND LOSSES | | | |
| CHANGE IN NET ASSETS | 131,166 | 763,124 | 894,290 |
| NET ASSETS AT BEGINNING OF YEAR | 2,093,955 | 8,767,737 | 10,861,692 |
| NET ASSETS AT END OF YEAR | \$ 2,225,121 | \$ 9,530,861 | \$ 11,755,982 |

The accompanying notes are an integral part of these financial statements.

| 2019 | | |
|-------------------------------|----------------------------|----------------------|
| Without Donor Restrictions | With Donor Restrictions | Totals |
| \$ 150,439 | \$ 739,616 | \$ 890,055 |
| 2,710 | - | 2,710 |
| 787 | - | 787 |
| 106,761 | 272,166 | 378,927 |
| 11,575 | 14,639 | 26,214 |
| - | - | - |
| 14,465 | 4,822 | 19,287 |
| 220,417 | - | 220,417 |
| 28,234 | 84,404 | 112,638 |
| 18,650 | 36,798 | 55,448 |
| 58,941 | 133,060 | 192,001 |
| 240,104 | 569,543 | 809,647 |
| - | 32,454 | 32,454 |
| - | 10,651 | 10,651 |
| - | (641) | (641) |
| 2,797 | - | 2,797 |
| 75,802 | (75,802) | - |
| <u>568,969</u> | <u>(568,969)</u> | <u>-</u> |
| | | |
| <u>1,500,651</u> | <u>1,252,741</u> | <u>2,753,392</u> |
| | | |
| 704,296 | - | 704,296 |
| 635,462 | - | 635,462 |
| 2,500 | - | 2,500 |
| <u>-</u> | <u>800</u> | <u>800</u> |
| | | |
| <u>1,342,258</u> | <u>800</u> | <u>1,343,058</u> |
| | | |
| 158,393 | 1,251,941 | 1,410,334 |
| <u>1,935,562</u> | <u>7,515,796</u> | <u>9,451,358</u> |
| | | |
| <u>\$ 2,093,955</u> | <u>\$ 8,767,737</u> | <u>\$ 10,861,692</u> |

LINN-BENTON COMMUNITY COLLEGE FOUNDATION

(an Oregon not-for-profit corporation)

STATEMENTS OF FUNCTIONAL EXPENSES

For the Years Ended December 31, 2020 and 2019

| | 2020 | | | Totals |
|--|-------------------|------------------------|------------------|---------------------|
| | Program Services | Management and General | Fundraising | |
| Scholarships and grants | \$ 301,184 | \$ - | \$ - | \$ 301,184 |
| Materials and supplies | 18,959 | - | - | 18,959 |
| Materials for resale | - | 2,723 | - | 2,723 |
| Postage | - | 935 | - | 935 |
| Printing | - | 9,802 | - | 9,802 |
| Publishing | - | 1,150 | - | 1,150 |
| Licenses and fees | - | 5,927 | - | 5,927 |
| Administrative support | - | 244,855 | - | 244,855 |
| Contracted services | 52,218 | 9,620 | - | 61,838 |
| Insurance | - | 18,852 | - | 18,852 |
| Software | - | 16,915 | - | 16,915 |
| Contributions for capital acquisitions | 15,344 | - | - | 15,344 |
| Telephone | - | - | - | - |
| Depreciation expense | - | 4,272 | - | 4,272 |
| Travel | 1,896 | - | - | 1,896 |
| In-kind contributions | - | 193,062 | - | 193,062 |
| In-kind program contributions | 144,017 | - | - | 144,017 |
| Other expenses | 54,472 | 21,986 | 15,001 | 91,459 |
| Totals | <u>\$ 588,090</u> | <u>\$ 530,099</u> | <u>\$ 15,001</u> | <u>\$ 1,133,190</u> |

The accompanying notes are an integral part of these financial statements.

2019

| Supporting Services | | | |
|---------------------|------------------------|-----------------|---------------------|
| Program Services | Management and General | Fundraising | Totals |
| \$ 282,875 | \$ - | \$ - | \$ 282,875 |
| 40,969 | - | 2,500 | 43,469 |
| - | 1,179 | - | 1,179 |
| - | 3,046 | - | 3,046 |
| - | 15,548 | - | 15,548 |
| - | 5,517 | - | 5,517 |
| - | 4,941 | - | 4,941 |
| - | 247,336 | - | 247,336 |
| 136,200 | 11,300 | - | 147,500 |
| - | 17,272 | - | 17,272 |
| - | 24,003 | - | 24,003 |
| 79,692 | - | - | 79,692 |
| - | 67 | - | 67 |
| - | 4,273 | - | 4,273 |
| 17,557 | - | - | 17,557 |
| - | 220,417 | - | 220,417 |
| 112,638 | - | - | 112,638 |
| 34,365 | 80,563 | - | 114,928 |
| <u>\$ 704,296</u> | <u>\$ 635,462</u> | <u>\$ 2,500</u> | <u>\$ 1,342,258</u> |

LINN-BENTON COMMUNITY COLLEGE FOUNDATION

(an Oregon not-for-profit corporation)

STATEMENTS OF CASH FLOWS

For the Years Ended December 31, 2020 and 2019

| | 2020 | 2019 |
|--|-------------------|---------------------|
| CASH FLOWS FROM OPERATING ACTIVITIES | | |
| Change in net assets | \$ 894,290 | \$ 1,410,334 |
| Adjustments to reconcile change in net assets to net cash provided (used) by operating activities | | |
| Depreciation expense | 4,272 | 4,273 |
| In-kind contributions revenue | (193,062) | (220,417) |
| In-kind contributions expense | 193,062 | 220,417 |
| In-kind program contributions revenue | (144,017) | (112,638) |
| In-kind program contributions expense | 144,017 | 112,638 |
| Contributions of stock | (35,581) | (35,799) |
| Contributions of fixed assets | - | (10,000) |
| Realized loss-(gain) on sale of investments | (93,203) | (192,001) |
| Unrealized loss-(gain) on investments | (681,153) | (809,647) |
| Change in beneficial interest in assets held by The Oregon Community Foundation | (18,332) | (32,454) |
| Change in value of split-interest agreements | 603 | 641 |
| Realized loss on disposition of fixed assets | - | 800 |
| (Increase) decrease in: | | |
| Contributions receivable | - | 7,999 |
| Pledges receivable | 5,000 | 1,029 |
| Prepaid expenses | (7,436) | 5,355 |
| Increase (decrease) in: | | |
| Accounts payable | 137,857 | 70,866 |
| Obligations under split-interest agreements | (1,870) | (1,870) |
| Contributions and grants restricted for long-term purposes | (253,804) | (371,333) |
| Payments of charitable gift annuity obligations | <u>1,870</u> | <u>1,870</u> |
| NET CASH PROVIDED (USED) BY OPERATING ACTIVITIES | <u>(47,487)</u> | <u>50,063</u> |
| CASH FLOWS FROM INVESTING ACTIVITIES | | |
| Purchase of investments | (1,643,277) | (2,573,569) |
| Proceeds from sale of investments | <u>845,581</u> | <u>2,842,829</u> |
| NET CASH PROVIDED (USED) BY INVESTING ACTIVITIES | <u>(797,696)</u> | <u>269,260</u> |
| CASH FLOWS FROM FINANCING ACTIVITIES | | |
| Payments of charitable gift annuity obligations | (1,870) | (1,870) |
| Collection of contributions and grants restricted for long-term purposes | <u>253,804</u> | <u>371,333</u> |
| NET CASH PROVIDED BY FINANCING ACTIVITIES | <u>251,934</u> | <u>369,463</u> |
| NET INCREASE (DECREASE) IN CASH AND CASH EQUIVALENTS | (593,249) | 688,786 |
| CASH AND CASH EQUIVALENTS, beginning of year | <u>1,015,879</u> | <u>327,093</u> |
| CASH AND CASH EQUIVALENTS, end of year | <u>\$ 422,630</u> | <u>\$ 1,015,879</u> |
| SUPPLEMENTAL DISCLOSURES | | |
| Interest paid | \$ - | \$ - |
| Income taxes paid | - | - |

The accompanying notes are an integral part of these financial statements.

LINN-BENTON COMMUNITY COLLEGE FOUNDATION

(an Oregon not-for-profit corporation)

NOTES TO FINANCIAL STATEMENTS

December 31, 2020 and 2019

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

A. Organization and Nature of Activities

Linn-Benton Community College Foundation is an Oregon not-for-profit corporation founded in 1972 under the laws and regulations of the state of Oregon. The Foundation exists for the express purpose of advancing and promoting the interest and development of Linn-Benton Community College and the students, faculty, and community. The Foundation provides a means for supporting projects and programs that are beyond the scope of the College. The Foundation's Board of Trustees is organized to solicit and accept gifts in support of Linn-Benton Community College and to manage, invest, and account for the assets of the Foundation.

The College-Foundation relationship is one of symbiosis with each entity beneficial to the other.

B. Income Taxes

Linn-Benton Community College Foundation is a not-for-profit organization that is exempt from income taxes under Section 501(c)(3) of the Internal Revenue Code. Therefore, no provision for income taxes is included in the financial statements. In addition, the Foundation qualifies for the charitable contribution deduction under Section 170(b)(1)(A) and has been classified as an organization that is not a private foundation under Section 509(a)(2).

The Foundation's tax exempt status can be revoked by the Internal Revenue Service as a result of direct violations of laws and regulations governing 501(c)(3) organizations. It is the Foundation's policy, therefore, to maintain strict adherence to these laws and regulations in order to maintain its tax-exempt status and to engage only in activities related to their exempt purpose.

Income from activities not directly related to performance of the Foundation's tax-exempt purposes could be subject to taxation as unrelated business income. The Foundation has evaluated each of these sources of income and believes that none of them meet the Internal Revenue Service definition of unrelated business income; therefore, no entries have been made in these financial statements to recognize potential income tax liability. The Foundation's tax returns for years prior to 2017 are generally no longer subject to examination by taxing authorities.

C. Basis of Presentation

Linn-Benton Community College Foundation records its revenue and expenses using the accrual basis of accounting. Under this method, revenues are recorded when earned and expenses are recorded when the liability is incurred.

Financial statement presentation follows the requirements of the Financial Accounting Standards Board (FASB) Accounting Standards Codification (ASC) 958, *Not-for-Profit Entities*. Under FASB ASC 958, the Foundation is required to report information regarding its financial position and activities according to the following net assets classifications:

LINN-BENTON COMMUNITY COLLEGE FOUNDATION

(an Oregon not-for-profit corporation)

NOTES TO FINANCIAL STATEMENTS

December 31, 2020 and 2019

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

C. Basis of Presentation (Continued)

Net assets without donor restrictions - Net assets that are not subject to donor-imposed restrictions and may be expended for any purpose in performing the primary objectives of the organization.

Net assets with donor restrictions - Net assets subject to stipulations imposed by donors. Some donor restrictions are temporary in nature; those restrictions will be met by actions of the Foundation or by the passage of time. Other donor restrictions are perpetual in nature, where by the donor has stipulated the funds be maintained in perpetuity.

D. Public Support and Revenue

In accordance with FASB ASC 958-605, contributions received are recorded as increases in net assets without donor restrictions or increases in net assets with donor restrictions depending on the existence and/or nature of any donor restrictions.

All donor-restricted support is reported as an increase in net assets with donor restrictions. When a restriction expires (that is, when a stipulated time restriction ends or purpose restriction is accomplished), net assets are reclassified from net assets with donor restrictions to net assets without donor restrictions in the statements of activities.

Donated services are recognized as contributions in accordance with FASB ASC 958-605 if the services (a) create or enhance nonfinancial assets or (b) require specialized skills, are performed by people with those skills, and would otherwise be purchased by Linn-Benton Community College Foundation. Volunteers also provided services throughout the year that are not recognized as contributions in the financial statements since the recognition criteria under FASB ASC 958-605 were not met. During 2020 and 2019, Linn-Benton Community College Foundation received donated services valued at \$179,843 and \$207,371, respectively.

Linn-Benton Community College Foundation occupies an office at Linn-Benton Community College. The fair value of this occupancy for the years ended December 31, 2020 and 2019 is \$13,219 and \$13,046, respectively.

E. Estimates

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect certain reported amounts and disclosures. Accordingly, actual results could differ from those estimates.

F. Cash and Cash Equivalents

Linn-Benton Community College Foundation considers all highly liquid investments available for current use with an initial maturity of three months or less to be cash equivalents.

LINN-BENTON COMMUNITY COLLEGE FOUNDATION

(an Oregon not-for-profit corporation)

NOTES TO FINANCIAL STATEMENTS

December 31, 2020 and 2019

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

G. Investments

In accordance with FASB ASC 958-320, investments in marketable securities with readily determinable fair values and all investments in debt securities and real estate are reported at their fair values in the statements of financial position. Realized and unrealized gains and losses are included in the change in net assets. Investment income and gains are reported as increases in net assets without donor restrictions unless the donor places temporary or permanent restrictions on the investment income and gains. Once the restrictions are met (either by passage of time or by use) the investment income and gains are reclassified to net assets without donor restrictions and reported in the statements of activities as net assets released from restriction.

H. Beneficial Interest In Assets Held By The Oregon Community Foundation

The Foundation is in an Endowment Partners Program with The Oregon Community Foundation (OCF). OCF is an Oregon not-for-profit corporation. Endowment Partners Program endowments are OCF funds established by charitable organizations in Oregon to serve as their endowments. OCF maintains variance power and legal ownership of the endowments and reports the funds as assets. In accordance with FASB ASC No. 958-605-25-33, a liability is established on the financial statements of OCF for the fair market value of the endowments. Linn-Benton Community College Foundation reports a beneficial interest in assets held by OCF as an asset in its financial statements.

Distributions are normally made at least annually based on a percentage determined by the Board of Directors of OCF under its grant percentage payout policy. Additional distributions are also available with the approval of the Linn-Benton Community College Foundation Board of Trustees and OCF's Board of Directors.

The Foundation's beneficial interest in assets held by The Oregon Community Foundation is reported at fair value.

I. Property and Equipment

Donations of property and equipment are recorded as support at their estimated fair value. Property and equipment valued at \$5,000 or greater and maintained by the Foundation are capitalized. All others are expensed. Such donations are reported as net assets without donor restrictions unless the donor has restricted the donated asset to a specific purpose. Assets donated with explicit restrictions regarding their use and contributions of cash that must be used to acquire property and equipment are reported as net assets with donor restrictions. Absent donor stipulations regarding how long those donated assets must be maintained, the Foundation reports expirations of donor restrictions when the donated or acquired assets are placed in service or distributed to Linn-Benton Community College as instructed by the donor. The Foundation reclassifies net assets with donor restrictions to net assets without donor restrictions at that time.

Capital assets are depreciated using the straight line method over their useful life. The duplex is being depreciated over 30 years.

LINN-BENTON COMMUNITY COLLEGE FOUNDATION

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NOTES TO FINANCIAL STATEMENTS

December 31, 2020 and 2019

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

J. Obligations Under Split-Interest Agreements

Obligations under split-interest agreements, which consisted of two charitable gift annuities, are recorded when incurred at the present value, discounted at 3.25%, of the distributions to be made to the donor and/or donor-designated beneficiaries over either their actuarially determined expected lives or the life of the agreement. Distributions under the charitable gift annuities are fixed as specified in a Gift and Annuity Agreement. Obligations under split-interest agreements are revalued at the end of each year with the change being recognized in the statements of activities.

K. Endowment Fund Policy

The Board of Trustees has established guidelines for the utilization of the Endowment Fund maintained to benefit the general purposes of the Foundation. The policy sets forth that the Foundation shall accept current and deferred gifts to the Endowment Fund. The Foundation's policy is to maintain the principal of the fund in perpetuity. The policy allows up to 5 percent of the endowment's fair value based on a 3-year rolling average balance, including investment earnings, to be expended in a given fiscal year as determined by the Board of Trustees.

If an endowment's fair market value falls below the required minimum investment at the time the endowment was executed, the Foundation will not distribute any amount until the assets exceed that minimum. Any income not utilized in a given year may be retained for future use according to the endowment's established purpose or reinvested in the endowment's principal. The Foundation's Board of Trustees is responsible for determining the annual distribution percentage and the method of calculation as deemed to be in the best interest of the Endowment Fund.

Endowment Fund assets are pooled in the Foundation's Endowment Fund and managed by the Board of Trustees Finance Committee as well as professional investment firms. The goal of the Endowment Fund is to maintain the principal with sufficient returns to both grow the Endowment Fund and meet the income requirements for annual distributions to support the Endowment Fund's established purpose such as providing annual scholarships. The Endowment Fund's investment strategy is a conservative growth model which includes mutual funds, stocks, real estate and other assets.

L. Functional Allocation of Expenses

The costs of providing various programs and other activities have been summarized on a functional basis in the statements of activities and in the statements of functional expenses. Accordingly, certain costs have been allocated among the programs and supporting services benefited.

LINN-BENTON COMMUNITY COLLEGE FOUNDATION

(an Oregon not-for-profit corporation)

NOTES TO FINANCIAL STATEMENTS

December 31, 2020 and 2019

NOTE 2 – AVAILABILITY AND LIQUIDITY

Financial assets at December 31, 2020 and 2019 available to meet general expenditures, that is, without donor restrictions limiting their use, within one year of the statement of financial position date, are comprised of the following:

| | <u>2020</u> | <u>2019</u> |
|--|-------------------|-------------------|
| Financial assets at year end: | | |
| Cash and cash equivalents | \$ 422,630 | \$ 1,015,879 |
| Pledges receivable | 10,114 | 15,114 |
| Investments | 10,790,898 | 9,183,265 |
| Beneficial interest in assets held by The Oregon Community Foundation | <u>288,681</u> | <u>270,349</u> |
| Total financial assets | <u>11,512,323</u> | <u>10,484,607</u> |
| Less donor-restricted amounts not available for general expenditures within one year: | | |
| Endowment funds restricted in perpetuity | 4,872,232 | 4,618,428 |
| Endowment accounts restricted for scholarships and program activities | 3,105,496 | 2,652,846 |
| Non-endowment accounts restricted for scholarships and program activities | 1,052,206 | 998,249 |
| Assets held under split-interest agreements | 30,420 | 25,312 |
| Beneficial interest in assets held by The Oregon Community Foundation | <u>288,681</u> | <u>270,349</u> |
| Total donor-restricted amounts | <u>9,349,035</u> | <u>8,565,184</u> |
| Less board-designated endowment | <u>1,644,792</u> | <u>1,539,464</u> |
| Financial assets available to meet general expenditures over the next year | <u>\$ 518,496</u> | <u>\$ 379,959</u> |

Endowment funds consist of donor-restricted endowments and funds designated by the Board of Trustees as endowments. Donor restricted endowment funds received are restricted in perpetuity and are not available for general expenditures. Investment earnings from donor-restricted endowments are restricted for specific purposes, primarily scholarships and program activities. The Foundation's endowment spending policy allows up to 5 percent of the endowment's fair value based on a 3-year rolling average balance, including investment earnings, to be expended in a given fiscal year as determined by the Board of Trustees.

LINN-BENTON COMMUNITY COLLEGE FOUNDATION

(an Oregon not-for-profit corporation)

NOTES TO FINANCIAL STATEMENTS

December 31, 2020 and 2019

NOTE 2 – AVAILABILITY AND LIQUIDITY (Continued)

The board-designated endowment is a quasi-endowment fund created by the Board of Trustees. The use of these funds remains at the discretion of the Board of Trustees. These amounts could be made available if necessary.

As part of its liquidity management plan, the Foundation invests cash in excess of daily requirements in readily available money market funds and certificates of deposit.

NOTE 3 – CASH AND CASH EQUIVALENTS

Cash and cash equivalents balances for the years ended December 31, 2020 and 2019 consist of the following:

| | <u>2020</u> | <u>2019</u> |
|---------------------------------|-------------------|---------------------|
| Petty cash | \$ 50 | \$ 50 |
| Checking account | 234,835 | 407,539 |
| Money market accounts | <u>187,745</u> | <u>608,290</u> |
| Total cash and cash equivalents | <u>\$ 422,630</u> | <u>\$ 1,015,879</u> |

NOTE 4 – PLEDGES RECEIVABLE

At December 31, 2020 and 2019, pledges receivable consisted of the following:

| | <u>2020</u> | <u>2019</u> |
|---|------------------|------------------|
| Due within one year | \$ 6,000 | \$ 6,000 |
| Due within one to two years | 5,000 | 5,000 |
| Due within two to three years | <u>-</u> | <u>5,000</u> |
| Pledges receivable | 11,000 | 16,000 |
| Unamortized discount to net present value | <u>(886)</u> | <u>(886)</u> |
| Pledges receivable, net | <u>\$ 10,114</u> | <u>\$ 15,114</u> |

The pledges receivable unamortized discount has been discounted using a rate of 3%.

LINN-BENTON COMMUNITY COLLEGE FOUNDATION

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NOTES TO FINANCIAL STATEMENTS

December 31, 2020 and 2019

NOTE 5 – LOANS RECEIVABLE

In January 2013, the Foundation Board of Trustees authorized an investment loan of \$100,000 for operations to a newly-formed not-for-profit company. In addition, the Foundation Board of Trustees authorized an additional loan during the year intended as a line of credit with a maximum loan amount of \$200,000 (increased to \$230,000 in May 2014). During 2013, the Foundation advanced the full \$100,000 investment loan plus amounts totaling \$195,000 on the additional loan. During 2014, the Foundation loaned an additional \$35,000 to the not-for-profit company. The not-for-profit company made interest payments of \$7,524 and required principal payments of \$2,469 during 2013, and made interest payments of \$750 during 2014. No payments were made in 2015. Terms of the loan agreements were modified throughout 2013, 2014 and 2015 to allow interest-only payments and, eventually, to defer all payments on the loans until 2016. During 2016, the not-for-profit company made interest payments of \$30,882 on the loans, and unpaid accrued interest totaling \$76,372 was added to the loan principal balance. During 2017, the not-for-profit company made interest payments of \$36,871 and principal payments of \$12,283. During 2018, the not-for-profit company made interest payments of \$23,775 and principal payments of \$10,152. In late 2018, terms of the loan agreements were modified to defer all payments on the loans until June 2019 with no accrual of interest during the deferral period. During 2019, the not-for-profit company made interest payments of \$2,710 and principal payments of \$2,797. No payments were made in 2020. The Foundation's financial statements reflect loans receivable of \$378,671 and an allowance of \$378,671 against all remaining loan balances as of December 31, 2020.

NOTE 6 – INVESTMENTS

The Foundation invests in premium investment grade mutual funds, certificates of deposit, equity securities, and debt securities from companies located throughout the United States and Europe. The Foundation also invests in real estate. Fair values and unrealized appreciation (depreciation) at December 31, 2020 and 2019 are summarized as follows:

| | 2020 | | | 2019 | | |
|-------------------------|---------------------|----------------------|--|---------------------|---------------------|--|
| | Cost | Fair Value | Unrealized Appreciation (Depreciation) | Cost | Fair Value | Unrealized Appreciation (Depreciation) |
| Investments | | | | | | |
| Equity mutual funds | \$ 6,224,947 | \$ 8,119,408 | \$ 1,894,461 | \$ 6,335,857 | \$ 7,578,084 | \$ 1,242,227 |
| Certificates of deposit | - | - | - | 300,000 | 299,428 | (572) |
| Real estate | 2,671,490 | 2,671,490 | - | 1,305,753 | 1,305,753 | - |
| | <u>\$ 8,896,437</u> | <u>\$ 10,790,898</u> | <u>\$ 1,894,461</u> | <u>\$ 7,941,610</u> | <u>\$ 9,183,265</u> | <u>\$ 1,241,655</u> |

LINN-BENTON COMMUNITY COLLEGE FOUNDATION

(an Oregon not-for-profit corporation)

NOTES TO FINANCIAL STATEMENTS

December 31, 2020 and 2019

NOTE 6 – INVESTMENTS (Continued)

The following schedule summarizes the investment return and its classification in the statements of activities for the years ended December 31, 2020 and 2019.

| | 2020 | | 2019 | |
|-------------------------|-------------------------------|----------------------------|-------------------------------|----------------------------|
| | Without Donor Restrictions | With Donor Restrictions | Without Donor Restrictions | With Donor Restrictions |
| Interest income | \$ 652 | \$ - | \$ 787 | \$ - |
| Dividend income | 83,872 | 197,542 | 106,761 | 272,166 |
| Net realized gains | 26,880 | 66,323 | 58,941 | 133,060 |
| Net unrealized gains | <u>198,476</u> | <u>482,677</u> | <u>240,104</u> | <u>569,543</u> |
| Total investment return | <u>\$ 309,880</u> | <u>\$ 746,542</u> | <u>\$ 406,593</u> | <u>\$ 974,769</u> |

NOTE 7 – BENEFICIAL INTEREST IN ASSETS HELD BY THE OREGON COMMUNITY FOUNDATION

The Foundation has a separate endowment fund at The Oregon Community Foundation. In accordance with FASB ASC 958-605, *Revenue Recognition*, Linn-Benton Community College Foundation accounts for its interest in this fund using the equity method of accounting, which approximates the present value of the estimated expected future cash flow that will inure to the Foundation. The assets in this fund are restricted for an endowment.

Changes in the Foundation's beneficial interest in this fund for the years ended December 31, 2020 and 2019 are summarized as follows:

| | 2020 | 2019 |
|--|-------------------|-------------------|
| Balance at beginning of year | \$ 270,349 | \$ 237,895 |
| Plus increase in the fair value of the assets | 29,193 | 43,105 |
| Less distribution of investment return to the Foundation | <u>(10,861)</u> | <u>(10,651)</u> |
| Balance at end of year | <u>\$ 288,681</u> | <u>\$ 270,349</u> |

LINN-BENTON COMMUNITY COLLEGE FOUNDATION

(an Oregon not-for-profit corporation)

NOTES TO FINANCIAL STATEMENTS

December 31, 2020 and 2019

NOTE 8 – PROPERTY AND EQUIPMENT

Property and equipment at December 31, 2020 and 2019 consisted of the following:

| | <u>2020</u> | <u>2019</u> |
|-------------------------------|-------------------|-------------------|
| Land | \$ 445,436 | \$ 445,436 |
| Building | 128,170 | 128,170 |
| Grand piano | 20,000 | 20,000 |
| Livestock | <u>24,600</u> | <u>24,600</u> |
| | 618,206 | 618,206 |
| Less accumulated depreciation | <u>40,587</u> | <u>36,315</u> |
| Total property and equipment | <u>\$ 577,619</u> | <u>\$ 581,891</u> |

During 1995, the Foundation received land as a non-cash contribution. The land was appraised at \$305,000 on the date of acquisition and is being held for use by Linn-Benton Community College for educational purposes.

In January 2010, the Foundation received notice of a planned gift from a retired Linn-Benton Community College employee who passed away in December 2009. The estate was in probate until June of 2011 when the Foundation took possession of a duplex in Corvallis, Oregon with an appraised value of \$139,800 for the land and \$128,170 for the building, and a small piece of land in New Mexico with an appraised value of \$636. The duplex is being rented out with the assistance of a management company.

The grand piano was purchased by the Foundation and is recorded at cost. The Foundation has granted Linn-Benton Community College exclusive use of the piano at no charge.

Periodically, the Foundation receives automobiles as donations. The Foundation registers the automobiles in the Foundation's name. These automobiles are then either sold outright with the proceeds going to one of the scholarship funds or donated to Linn-Benton Community College for various vocational programs.

The Foundation routinely receives horses from various donors. Some horses are turned over to Linn-Benton Community College for use in the College's agricultural technology program. Horses capitalized are being held for sale.

LINN-BENTON COMMUNITY COLLEGE FOUNDATION

(an Oregon not-for-profit corporation)

NOTES TO FINANCIAL STATEMENTS

December 31, 2020 and 2019

NOTE 9 – NET ASSETS WITHOUT DONOR RESTRICTIONS

| | <u>2020</u> | <u>2019</u> |
|----------------------------------|---------------------|---------------------|
| Undesignated | \$ 580,329 | \$ 554,491 |
| Board-designated quasi-endowment | <u>1,644,792</u> | <u>1,539,464</u> |
| Total | <u>\$ 2,225,121</u> | <u>\$ 2,093,955</u> |

NOTE 10 – NET ASSETS WITH DONOR RESTRICTIONS

Net assets with donor restrictions consist of the following at December 31, 2020 and 2019:

| | <u>2020</u> | <u>2019</u> |
|--|---------------------|---------------------|
| Subject to expenditure for specified purposes: | | |
| Endowment accounts: | | |
| Restricted for scholarships and program activities | \$ 3,054,929 | \$ 2,614,826 |
| Non-endowment accounts: | | |
| Restricted for scholarships and program activities | <u>1,284,599</u> | <u>1,238,822</u> |
| Sub-total | 4,339,528 | 3,853,648 |
| Subject to the passage of time: | | |
| Assets held under split-interest agreements | 30,420 | 25,312 |
| Endowment funds restricted in perpetuity | 4,872,232 | 4,618,428 |
| Not subject to spending policy or appropriation: | | |
| Beneficial interest in assets held by The Oregon Community Foundation | <u>288,681</u> | <u>270,349</u> |
| Total | <u>\$ 9,530,861</u> | <u>\$ 8,767,737</u> |

During the years ended December 31, 2020 and 2019, \$574,238 and \$644,771, respectively, were released from donor restrictions because purpose restrictions were satisfied, because of the passage of time, or because of distributions made from the beneficial interest in assets held by The Oregon Community Foundation.

LINN-BENTON COMMUNITY COLLEGE FOUNDATION

(an Oregon not-for-profit corporation)

NOTES TO FINANCIAL STATEMENTS

December 31, 2020 and 2019

NOTE 11 – ENDOWMENT FUNDS

Endowment funds activity during the years ended December 31, 2020 and 2019, was as follows:

| | Without Donor Restrictions - Quasi-Endowment | With Donor Restrictions | | |
|---|--|---------------------------|---------------------------|--------------------|
| | | Temporarily Restricted | Permanently Restricted | Total |
| Year ended December 31, 2020: | | | | |
| Balance at beginning of year | \$ 1,539,464 | \$ 2,885,175 | \$4,618,428 | \$9,043,067 |
| Contributions | - | 53,044 | 163,804 | 216,848 |
| Unrealized gain-(loss) on endowment investments | 136,304 | 505,476 | - | 641,780 |
| Investment income | 56,572 | 267,036 | - | 323,608 |
| Expenses | (87,548) | (277,121) | - | (364,669) |
| Reclassifications | - | (90,000) | 90,000 | - |
| Balance at end of year | <u>\$ 1,644,792</u> | <u>\$ 3,343,610</u> | <u>\$4,872,232</u> | <u>\$9,860,634</u> |
| | | | | |
| Year ended December 31, 2019: | | | | |
| Balance at beginning of year | \$ 1,374,053 | \$ 2,002,372 | \$4,247,095 | \$7,623,520 |
| Contributions | - | 136,089 | 371,333 | 507,422 |
| Other income | - | 93 | - | 93 |
| Unrealized gain-(loss) on endowment investments | 130,248 | 608,421 | - | 738,669 |
| Investment income | 92,007 | 405,408 | - | 497,415 |
| Interest on loans | 2,710 | - | - | 2,710 |
| Recovery of bad debts | 2,797 | - | - | 2,797 |
| Expenses | (62,351) | (266,458) | - | (328,809) |
| Reclassifications | - | (750) | - | (750) |
| Balance at end of year | <u>\$ 1,539,464</u> | <u>\$ 2,885,175</u> | <u>\$4,618,428</u> | <u>\$9,043,067</u> |

LINN-BENTON COMMUNITY COLLEGE FOUNDATION

(an Oregon not-for-profit corporation)

NOTES TO FINANCIAL STATEMENTS

December 31, 2020 and 2019

NOTE 12 – SPLIT-INTEREST AGREEMENTS

At December 31, 2020 and 2019, total assets held under split-interest agreements consisted of investments with a fair market value of \$47,669 and \$43,828 respectively.

In late 2012, the Foundation entered into a charitable gift annuity agreement whereby the donor provided the Foundation with \$20,000 in cash in exchange for the right to receive an annuity of \$940 per year (paid in semi-annual installments of \$470) during the donor's natural life. The net present value of the estimated liability for future payments under this annuity agreement was \$10,440 at December 31, 2020. Annuity payments of \$940 were paid during 2020 and a \$359 change in the value of this split-interest agreement was recognized during 2020.

In 2015, the Foundation entered into a charitable gift annuity agreement whereby the donor provided the Foundation with \$15,000 in cash in exchange for the right to receive an annuity of \$930 per year (paid in semi-annual installments of \$465) during the natural life of the donor and their spouse. The net present value of the estimated liability for future payments under this annuity agreement was \$6,809 at December 31, 2020. Annuity payments of \$930 were paid during 2020 and a \$244 change in the value of this split-interest agreement was recognized during 2020.

NOTE 13 – CONCENTRATIONS OF CREDIT RISK ARISING FROM CASH HELD WITH INSTITUTIONS

The Foundation maintains a checking account at a financial institution insured by the Federal Deposit Insurance Corporation (FDIC) up to \$250,000 at December 31, 2020. Amounts at our banking institution were fully insured as of December 31, 2020.

NOTE 14 – CONCENTRATIONS OF CREDIT RISK ARISING FROM INVESTMENTS

The Foundation's investments at December 31, 2020 are maintained with the local branch of the investment firm, Edward Jones. The Foundation's investments are diversified in a variety of mutual funds, certificates of deposit and equity securities. However, the Foundation's investments are subject to market fluctuations, which could dramatically affect the carrying value of these assets. The Foundation's investments are insured by the Securities Investors Protection Corporation (SIPC) up to a maximum of \$500,000. Investments at Edward Jones are also covered by additional insurance provided to investors through the company.

NOTE 15 – FAIR VALUE MEASUREMENTS

The Foundation follows the requirements of Financial Accounting Standards Board (FASB) Accounting Standards Codification (ASC) 820, *Fair Value Measurements and Disclosures*. In accordance with FASB ASC 820, the fair value of a financial instrument is the price that would be received to sell an asset or paid to satisfy a liability in an orderly transaction between market participants at the measurement date. Accounting standards establish a framework for measuring fair value and a three level hierarchy for fair value measurements based upon observable and

LINN-BENTON COMMUNITY COLLEGE FOUNDATION

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NOTES TO FINANCIAL STATEMENTS

December 31, 2020 and 2019

NOTE 15 – FAIR VALUE MEASUREMENTS (Continued)

unobservable input valuation techniques. Observable inputs reflect market data obtained from independent sources, while unobservable inputs reflect significant market assumptions including those made by the reporting entity. The three level hierarchy is summarized as follows:

Level 1 - Quoted prices in active markets for identical securities

Level 2 - Other significant observable inputs (including quoted prices for similar securities, interest rates, credit risk, etc.)

Level 3 - Significant unobservable inputs

Categorization within the valuation hierarchy is based upon the lowest level of input that is significant to the fair value measurement.

The carrying amounts of investments in equity mutual funds, certificates of deposit and equity securities are based upon quoted market values, a Level 1 input.

The Foundation's beneficial interest in assets held by The Oregon Community Foundation is reported at fair value at December 31, 2020. These assets are reported at fair value using information received from OCF (i.e., Level 3).

The Foundation's investment in real estate is reported at fair value determined by an appraisal of the real estate conducted near the end of the year. This is a Level 3 input.

NOTE 16 – RELATED PARTY TRANSACTIONS

The loans made by the Foundation to the not-for-profit company and related principal and interest payments described in Note 5 are considered related party transactions. Under the terms of loan agreements, the Foundation has the right to appoint three members to the Board of Directors of the not-for-profit company, consisting of two members of the Foundation Board of Trustees plus the Executive Director of the Foundation. This constitutes a voting majority of the Board of Directors of the not-for-profit company, which was a condition of the Foundation making the loans to the not-for-profit company. Currently, the Foundation is not exercising this right and has no representatives on the Board of Directors of the not-for-profit company.

NOTE 17 – SUBSEQUENT EVENTS

Management has evaluated subsequent events through October 29, 2021, which was the date that the financial statements were available to be issued.

LINN-BENTON COMMUNITY COLLEGE
ALBANY, OREGON

FEDERAL SINGLE AUDIT ACT AUDIT
IN ACCORDANCE WITH THE UNIFORM GUIDANCE

Year Ended June 30, 2021

KENNETH KUHNS & CO.

Certified Public Accountants
570 Liberty Street S.E., Suite 210
Salem, Oregon 97301-3594

Telephone: (503) 585-2550

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KENNETH KUHNS & CO.
CERTIFIED PUBLIC ACCOUNTANTS
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INDEPENDENT AUDITOR'S REPORT ON COMPLIANCE FOR EACH MAJOR
FEDERAL PROGRAM; REPORT ON INTERNAL CONTROL OVER COMPLIANCE; AND
REPORT ON SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS
REQUIRED BY THE UNIFORM GUIDANCE

February 16, 2022

Board of Education
Linn-Benton Community College
Albany, Oregon

Report on Compliance for Each Major Federal Program

We have audited Linn-Benton Community College's compliance with the types of compliance requirements described in the *OMB Compliance Supplement* that could have a direct and material effect on each of Linn-Benton Community College's major federal programs for the year ended June 30, 2021. Linn-Benton Community College's major federal programs are identified in the summary of audit results section of the accompanying schedule of findings and questioned costs.

Management's Responsibility

Management is responsible for compliance with federal statutes, regulations, and the terms and conditions of its federal awards applicable to its federal programs.

Auditor's Responsibility

Our responsibility is to express an opinion on compliance for each of Linn-Benton Community College's major federal programs based on our audit of the types of compliance requirements referred to above. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and the audit requirements of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Those standards and the Uniform Guidance require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to above that could have a direct and material effect on a major federal program occurred. An audit includes examining, on a test basis, evidence about Linn-Benton Community College's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances.

We believe that our audit provides a reasonable basis for our opinion on compliance for each major federal program. However, our audit does not provide a legal determination of Linn-Benton Community College's compliance.

Opinion on Each Major Federal Program

In our opinion, Linn-Benton Community College complied, in all material respects, with the types of compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended June 30, 2021.

Report on Internal Control Over Compliance

Management of Linn-Benton Community College is responsible for establishing and maintaining effective internal control over compliance with the types of compliance requirements referred to above. In planning and performing our audit of compliance, we considered Linn-Benton Community College's internal control over compliance with the types of requirements that could have a direct and material effect on each major federal program to determine the auditing procedures that are appropriate in the circumstances for the purpose of expressing an opinion on compliance for each major federal program and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, we do not express an opinion on the effectiveness of Linn-Benton Community College's internal control over compliance.

A deficiency in internal control over compliance exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. *A material weakness in internal control over compliance* is a deficiency, or combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. *A significant deficiency in internal control over compliance* is a deficiency, or combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies. We did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.

Report on Schedule of Expenditures of Federal Awards Required by the Uniform Guidance

We have audited the financial statements of Linn-Benton Community College as of and for the year ended June 30, 2021, and have issued our report thereon dated November 8, 2021 which contained an unmodified opinion on those financial statements. Our audit was conducted for the purpose of forming an opinion on the financial statements as a whole. The accompanying schedule of expenditures of federal awards is presented for purposes of additional analysis as required by the Uniform Guidance and is not a required part of the financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the schedule of expenditures of federal awards is fairly stated in all material respects in relation to the financial statements as a whole.

Kenneth Kuhns & Co.

Kenneth Kuhns & Co.

LINN-BENTON COMMUNITY COLLEGE

SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS

Year Ended June 30, 2021

| | Assistance Listing Number | Pass-Through Entity Identifying Number | Expenditures |
|---|---------------------------------|---|-------------------|
| <u>U.S. Department of Education:</u> | | | |
| Direct: Student Financial Aid Programs: | | | |
| Supplemental Educational Opportunity Grants | 84.007 | | \$ 385,914 |
| College Work Study | 84.033 | | 51,850 |
| Federal Direct Loan Program | 84.268 | | 6,323,629 |
| Pell Grant | 84.063 | | <u>5,433,888</u> |
| Total Student Financial Aid Programs | | | <u>12,195,281</u> |
| Direct: Title III Strengthening Institutions Program Grant | 84.031A | | <u>431,892</u> |
| Direct: Education Stabilization Fund: | | | |
| COVID-19 - Higher Education Emergency Relief Fund-IHE's | 84.425E | | 1,838,397 |
| COVID-19 - Higher Education Emergency Relief Fund-IHE/Instituion | 84.425F | | 6,181,302 |
| COVID-19 - Higher Education Emergency Relief Fund-Strengthening Institutions | 84.425M | | <u>391,397</u> |
| | | | 8,411,096 |
| Passed through Oregon Higher Education Coordinating Commission: | | | |
| COVID-19 - GEER Student Support | 84.425C | | <u>198,500</u> |
| Total Education Stabilization Fund | | | <u>8,609,596</u> |
| Passed through Oregon Higher Education Coordinating Commission: | | | |
| Adult Education - Grants to States | 84.002 | 16-366J | <u>256,089</u> |
| Passed through Oregon Department of Education: | | | |
| Career and Technical Education - Basic Grants to States - Tech Prep Education (Perkins Reserve) | 84.048 | | 6,446 |
| Career and Technical Education - Basic Grants to States - Small Schools Consortium (Perkins Basic) | 84.048 | | <u>544,215</u> |
| Total Career and Technical Education - Basic Grants to States | | | <u>550,661</u> |
| Passed through Oregon State University: | | | |
| GEAR Up | 84.334S | | <u>34,621</u> |
| Total U.S. Department of Education | | | <u>22,078,140</u> |

LINN-BENTON COMMUNITY COLLEGE

SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS

Year Ended June 30, 2021

| | Assistance Listing Number | Pass-Through Entity Identifying Number | Expenditures |
|---|---------------------------------|---|-----------------------------|
| <u>U.S. Department of Health and Human Services:</u> | | | |
| Passed through Oregon Department of Education: 477 Cluster: | | | |
| Child Care Resource and Referral | 93.575 | | \$ 160,219 |
| Child Care Resource and Referral | 93.596 | | <u>415,594</u> |
| Total 477 Cluster | | | 575,813 |
| Passed through Oregon Department of Education: | | | |
| Early Learning Hub-Coordinated Enrollment | 93.494 | | 400,585 |
| Promoting Safe and Stable Families | 93.556 | 155958 | <u>123,372</u> |
| Total U.S. Department of Health and Human Services | | | <u>1,099,770</u> |
| <u>Small Business Administration:</u> | | | |
| Passed through Lane Community College: | | | |
| Small Business Development Center | 59.037 | 16-149 | 73,000 |
| COVID-19 - SBA CARES Act Grant | 59.037 | | <u>27,606</u> |
| Total U.S. Small Business Administration | | | <u>100,606</u> |
| <u>National Science Foundation:</u> | | | |
| Direct: NSF S-STEM | 47.076 | | 39,500 |
| Direct: NSF GeoBridge Pipeline | 47.076 | | 39,105 |
| Passed through University of Washington: | | | |
| Pacific NW LSAMP | 47.076 | | <u>4,000</u> |
| Total National Science Foundation | | | <u>82,605</u> |
| <u>National Aeronautics & Space Administration:</u> | | | |
| Passed through Oregon State University: | | | |
| Oregon/NASA Space Grant Program | 43.008 | | <u>3,526</u> |
| <u>Institute of Museum and Library Services:</u> | | | |
| Passed through State Library of Oregon: | | | |
| LSTA Literacy Project | 45.310 | | <u>82,634</u> |
| <u>General Services Administration</u> | | | |
| Passed through Oregon Department of Administrative Services | 39.003 | | <u>3,674</u> |
| Federal Surplus Property | | | |
| Total Expenditures of Federal Awards | | | <u><u>\$ 23,450,955</u></u> |

LINN-BENTON COMMUNITY COLLEGE

NOTES TO SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS
Year Ended June 30, 2021

1. Purpose of the Schedule:

The accompanying schedule of expenditures of federal awards (the Schedule) is a supplementary schedule to Linn-Benton Community College's financial statements and is presented for purposes of additional analysis. Because the Schedule presents only a selected portion of the activities of the College, it is not intended to and does not present either the financial position or changes in net position of the College.

2. Significant Accounting Policies:

Reporting Entity: The reporting entity is fully described in Note 1 to the College's financial statements. The Schedule includes all federal financial assistance programs administered by the College for the year ended June 30, 2021.

Basis of Presentation: The information in the Schedule is presented in accordance with Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance).

Federal Financial Assistance: Pursuant to the Uniform Guidance, federal financial assistance is defined as assistance provided by a federal agency, either directly or indirectly, in the form of grants, contracts, cooperative agreements, loans, loan guarantees, property, interest subsidies, insurance or direct appropriations. Accordingly, nonmonetary federal assistance, including federal surplus property, is included in federal financial assistance and, therefore, is reported on the Schedule, if applicable. Federal financial assistance does not include direct federal cash assistance to individuals. Solicited contracts between the state and federal government for which the federal government procures tangible goods or services are not considered to be federal financial assistance.

Basis of Accounting: The expenditures in the Schedule are recognized as incurred based on the accrual basis of accounting and the cost accounting principles contained in the Uniform Guidance. Under those cost principles, certain types of expenditures are not allowable or are limited as to reimbursement. The College has elected not to use the ten percent de minimis indirect cost rate as allowed under the Uniform Guidance.

Matching Costs: The Schedule does not include matching expenditures.

LINN-BENTON COMMUNITY COLLEGE
 SCHEDULE OF FINDINGS AND QUESTIONED COSTS
 Year Ended June 30, 2021

A - SUMMARY OF AUDIT RESULTS:

1. The independent auditor's report expresses an unmodified opinion on the financial statements of Linn-Benton Community College.
2. There were no significant deficiencies in internal control over financial reporting reported during the audit of the financial statements of Linn-Benton Community College.
3. No instances of noncompliance material to the financial statements of Linn-Benton Community College were disclosed during the audit.
4. There were no significant deficiencies in internal control over compliance reported during the audit of the major federal award programs of Linn-Benton Community College.
5. The independent auditor's report on compliance for the major federal award programs of Linn-Benton Community College expresses an unmodified opinion.
6. No audit findings relative to the major federal award programs of Linn-Benton Community College are reported in this schedule.
7. The programs tested as major programs are as follows:

| Program Name | Assistance Listing Number |
|---|---------------------------------|
| Education Stabilization Fund | 84.425 |
| Higher Education Institutional Aid – Strengthening Institutions | 84.031A |

8. The threshold for distinguishing Type A programs from Type B programs was \$750,000.
9. Linn-Benton Community College was determined to be a low-risk auditee.

B - FINDINGS, FINANCIAL STATEMENTS AUDIT:

None.

C - FINDINGS AND QUESTIONED COSTS, MAJOR FEDERAL AWARD PROGRAMS AUDIT:

None.

COMMUNITY COLLEGE RULES OF PROCUREMENT

**EFFECTIVE MARCH 1, 2005, AND
AS
AMENDED AS OF December 3, 2018
AND EFFECTIVE *insert date*, VERSION 1.8,
THROUGH BOARD RESOLUTION *insert #***

**ADOPTED IN ACCORDANCE WITH
ORS 279A.065(5)(a) and ORS 279A.070**

BY

**XXXXXX COMMUNITY COLLEGE
THROUGH
BOARD RESOLUTION**

DATED

JANUARY 19, 2005

These Community College Rules of Procurement shall remain in effect unless modified, in writing, and adopted by the College's Local Contract Review Board through Board Resolution.



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SECTION 300 SUPPLEMENTARY PROVISIONS – CONTRACTING RULES

These Community College Rules of Procurement were drafted by participating statewide community college representatives with the intent that Sections 100 and 200 be adopted in their entirety and remain unchanged by their respective institutions unless modified by participating committee members at a later date and subsequently ratified by all their Local Contract Review Boards. Section 300 has been specifically set aside to address the unique philosophies, cultures, and/or concerns of the various community colleges, voting districts, and Local Contract Review Boards. In the event of conflict between rules or sections within these Community College Rules of Procurement, the rules in Section 300 (excluding Appendix A), shall take precedence over the rules in Sections 100 and/or 200 except as otherwise expressly provided in Sections 100 and 200; in all cases, Sections 100, 200, and 300 (excluding Appendix A), shall take precedence over Appendix A.

(Insert Your Specific 300 section)

- CCR.301 Consultant Selection: Architects, Engineers, Photogrammetrists, Transportation Planners, Land Surveyors and Providers of Related Services Contracts *(See also OAR 137-048-0210(2)(b), contained in Appendix A.)*
- CCR.302 Contract Amendments & Reinstatements
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- CCR.306 Educational & Institutional Cooperative Service, Incorporated
- CCR.308 Energy Management Controls Systems
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- CCR.312 Personal Services Contracts *(Amends CCR.250.)*
- CCR.314 Public Contracts Under Certain Dollar Amounts: Small Procurements and Intermediate Procurements *(See also ORS 279B.065 and 279B.070.)*
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APPENDIX A: OREGON ATTORNEY GENERAL'S MODEL PUBLIC CONTRACT RULES (OREGON ADMINISTRATIVE RULES), AS EXPRESSLY IDENTIFIED BY RULE NUMBER, AND INCORPORATED HEREIN BY REFERENCE--DIVISIONS 46, 47, 48, AND 49, PREPARED AND MAINTAINED BY THE STATE OF OREGON, DEPARTMENT OF JUSTICE, GENERAL COUNSEL DIVISION, AS AMENDED FROM TIME TO TIME.

Sections 100, 200, and/or 300 (excluding Appendix A), in these Community College Rules of Procurement shall prevail in every instance where there is a conflict or similarity between the Oregon Attorney General's Model Public Contract Rules, (Appendix A), and these Community College Rules of Procurement, effective March 1, 2005, subsequently reviewed/modified pursuant to ORS 279A.065(5)(b). *Rules from the Oregon Attorney General's Model Public Contract Rules that have been identified in the Table of Contents herein but which are shown with a line drawn through them have been stricken and have not been adopted by the College.*

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| 137-046-0450 | Interstate Cooperative Procurements |
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| 137-046-0470 | Protests and Disputes |
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DIVISION 47 GENERAL PROVISIONS

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| 137-047-0320 | Facsimile Bids and Proposals |
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| | |
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| 137-047-0550 | Prequalification of Prospective Offerors; Pre-negotiation of Contract Terms and Conditions |
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| 137-049-0290 | Bid or Proposal Security (<i>see also CCR 204</i>) |
| 137-049-0300 | Facsimile Bids and Proposals |
| 137-049-0310 | Electronic Procurement |
| 137-049-0320 | Pre-Closing Modification or Withdrawal of Offers |
| 137-049-0330 | Receipt, Opening and Recording of Offers; Confidentiality of Offers |
| 137-049-0340 | Late Bids, Late Withdrawals and Late Modifications |
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| 137-049-0360 | First-Tier Subcontractors; Disclosure and Substitution (<i>see also CCR 282</i>) |
| 137-049-0370 | Disqualification of Persons |
| 137-049-0380 | Bid or Proposal Evaluation Criteria |
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| 137-049-0395 | Notice of Intent to Award |
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**SECTION 100 - GENERAL
INFORMATION**

Purpose and Statutory Authority

CCR.102

- (1) **Purpose.** These rules prescribe public contract Special Procurements (exemptions), whereby a Local Contract Review Board may approve a special procurement (pursuant to ORS 279B.085), personal services contracting rules, competitive procurement process rules, and supplementary provisions for community colleges, who have formally adopted through board resolution, these Community College Rules of Procurement, hereinafter referred to as Rules or CCRP.
- (2) **Statutory Authority.** These Rules are authorized by Public Contracting Code 279A.050 (*Procurement Authority*), 279A.055 (*Personal Services Contracts*), 279A.060 (*Local Contract Review Boards*), and 279A.070 (*Rules*). All references to PCC shall mean Public Contracting Code as defined in ORS 279A.010(1)(bb). (*Note: Under ORS 279A.065(4), public contracting agencies in Oregon will be operating under the State of Oregon Attorney General's Model Rules unless they have taken special action to opt out and adopt their own contracting rules.*)
- (3) **Participating Oregon Community Colleges.** These Community College Rules of Procurement (CCRP), were drafted through a statewide, collaborative effort by representatives of Participating Oregon Community Colleges (POCC). Pursuant to the POCC participatory agreement, Sections 100 and 200 of the CCRP shall remain unchanged unless modified by the POCC at a later date and subsequently ratified by each institution's Local Contract Review Board. Any member of the POCC that adopts changes to Sections 100 and/or 200 of the CCRP that have not been mutually agreed upon and adopted by all other POCC members, shall by and through its actions, no longer qualify as a member of the POCC cooperative procurement group and shall not represent itself as such.
- (4) **Sustainability Commitment.** In accordance with the Oregon Community College Rules of Procurement, member colleges are committed to the use and purchase of environmentally and socially responsible materials and products, which are fiscally responsible, reduce resource consumption and waste, perform adequately, and promote human health and well-being. Recognizing their regional economic role, colleges shall seek opportunities to educate, encourage, and influence their respective markets by utilizing, where feasible, products and services, including new environmentally preferable products, reusable products, recycled content and recycled products.

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**Definitions for these Community College Rules of Procurement
CCR.104**

The following terms, when they appear capitalized in these Community College Rules of Procurement, shall have the meaning set forth below unless otherwise indicated:

- (1) **"Addendum" or "Addenda"** means an addition to or deletion from, a material change in, or general interest explanation of a Solicitation Document.
- (2) **"Auxiliary Funds"** means funds intended to be profit making and/or self-sustaining for providing product or services to the College's customers. (See also "Enterprise Funds.") Examples of Auxiliary Fund or Enterprise Fund operations may include: bookstores; food services; printing services; medical/dental/science stores; student automotive and mechanical stores; and miscellaneous student stores for the resale of books and computers for instruction.
- (3) **"Award" or "Intent to Award"** means, as the context requires, either the act or occurrence of the College's identification of the Person with whom the College will enter into a Contract following the resolution of any protest of the College's selection of that Person, and the completion of all Contract negotiations.
- (4) **"Best Value, Arriving at"** means evaluation or assessment of performance factors and other aspects of service and product quality, as well as pricing, which may include, but not be limited to, combinations of quality, services, time, total cost of ownership considerations, and the probability of the Offeror performing the requirements stated in the Solicitation.
- (5) **"Bid"** means a "Written" response to an Invitation to Bid.
- (6) **"Bidding/Proposing Period"** means the span of time between the date of the Solicitation Document and the time and date set for receipt of Offers. The time period shall be stated in the Solicitation Document. Generally a period of

fourteen (14) calendar days shall be provided, but in no case shall the time provided be less than five (5) calendar days.

- (7.) **“Closing”** means the date and time specified in a Solicitation Document as the deadline for submitting Offers.
- (8.) **“Code”** means the Public Contracting Code, as defined in ORS 279A.010.
- (9.) **“College”** means Community College District or Community College Service District established under ORS chapter 341, hereinafter known as the specific College whose name appears on the Solicitation Document and/or subsequent Contract and whose Local Contract Review Board has adopted by resolution or ordinance these Community College Rules of Procurement.
- (10.) **“Competitive Range”** means the Offerors with whom the College will conduct discussions or negotiations if the College intends to conduct discussions or negotiations in accordance with its own rules.
- (11.) **“Contract”** means a “Public Contract,” as defined in ORS 279A.010(1)(z), a sale or other disposal, or a purchase, lease, rental or other acquisition, by a contracting agency of personal property, services, including personal services, public improvements, public works, minor alterations, or ordinary repair or maintenance necessary to preserve a public improvement. “Public Contract” does not include grants. The “Contract” includes the College’s Solicitation Document and the accepted portions of a Solicitation Document, whether attached or incorporated by reference, between the College and Contractor describing the work to be done and the obligations of the parties. Depending upon the goods and services being procured, the College may use “Contract” as meaning a purchase order, price agreement, or other contract document in addition to the College’s Solicitation Document and the accepted portions of a Solicitation Document. If the Contract is for a public improvement or public work, the “Contract” may consist of the College’s Solicitation Document, including any addenda, the general and special and/or supplementary conditions or other conditions governing the work, the accepted portions of the Solicitation Document, the performance and payment bond (if required), certificates of insurance, plans, technical specifications, approved shop drawings, Construction Change Directive or written order for a minor change in the Work, Notice of Award, Notice to Proceed, and any contract amendments, including approved change orders.
- (12.) **“Contract Price”** means, as the context requires, (i) the maximum monetary obligation that the College either will or may incur under a Contract, including bonuses, incentives, approved alternates, and contingency amounts, if the Contractor fully performs under the Contract.
- (13.) **“Contract Review Authority”** means the College’s Local Contract Review Board as set forth in ORS 279A.060.
- (14.) **“Contract Value”** - in determining the applicability of dollar threshold requirements for competitive procurements within these Community College Rules of Procurement, “Contract Value” means the gross amount of goods and/or services procured by or for the College and shall take into consideration, but not be limited to, the following elements: (1) Contract Price; (2) total amount estimated to be generated, if contract is anticipated to be revenue generating; (3) economic value, and (4) total estimated expenses incurred for which the College would be required to report to the Internal Revenue Service (e.g., 1099).
- (15.) **“Contractor”** means the Person with whom the College enters into a Contract and shall be synonymous with “Independent Contractor” (i.e., a person or business that provides services to the College in which the College neither controls nor has the right to control the means or manner by which work is performed). The College may control the results of the services, but not control the means or manner of the Contractor’s performance of the Work.
- (16.) **“Cost”** means not only the product price but also other items of expense such as the actual or reasonably estimated costs related to quality or conversion, and may include such actual or estimated items as shipping, delivery, setup, installation, and training.
- (17.) **“Descriptive Literature”** means “Written” information submitted with the Offer that addresses the Goods and Services included in the Offer.
- (18.) **“Disadvantaged Business Enterprise (DBE)”** means a small business concern pursuant to ORS 200.005(1), which is at least 51 percent owned by one or more socially and economically disadvantaged individuals, or, in the case of any corporation, at least 51 percent of the stock of which is owned by one or more socially and economically disadvantaged individuals and whose management and daily business operations are controlled by one or more of the socially and economically disadvantaged individuals who own it.
- (19.) **“Effective Date of Contract”** means the date established in the Contract for the Contractor’s work to begin, or the date the Contract has been fully executed and received all required approvals, whichever date is later.

- (20.) **“Electronic Advertisement”** means notice of the College’s request for Offers or Request for Quotes, available over the Internet via (a) The World Wide Web or some other Internet protocol; or (b) the College’s electronic procurement system.
- (21.) **“Electronic Offer”** means a response to the College’s request for Offers or Request for Quotes submitted to the College via email or through the College’s Electronic Procurement System.
- (22.) **“Electronic Procurement System”** means an information system that Persons may access through the Internet, using the World Wide Web or some other Internet protocol, or that Persons may otherwise remotely access using a computer, that enables Persons to send Electronic Offers and the College to post Electronic Advertisements, receive Electronic Offers, and conduct other activities related to a procurement.
- (23.) **“Emergency”** means circumstances that were not reasonably foreseen by the governing body of the College, its President or another officer authorized by the College, and create a substantial risk of loss, damage or interruption of services; a substantial threat to property, public health, welfare or safety of the environment that requires prompt execution of a Contract to remedy the condition or deal with the risk.
- (24.) **“Enterprise Funds”** means funds intended to be profit making and/or self-sustaining for providing product or services to the College’s customers. (See also “Auxiliary Funds.”) Examples of Auxiliary Fund or Enterprise Fund operations may include: bookstores; food services; printing services; medical/dental/science stores; student automotive and mechanical stores; and miscellaneous student stores for the resale of books and computers for instruction.
- (25.) **“Evidence of Competition”** means College documentation demonstrating competitive solicitation of responses/Offer from Person(s) in selecting a Contractor in accordance with the College’s public contracting rules.
- (26.) **“Facsimile”** means electronic equipment that communicates and reproduces both printed and handwritten material.
- (27.) **“Gift”** means something of economic value given to a public official or a relative or member of the household of the public official without valuable consideration of equivalent value, including the full or partial forgiveness of indebtedness, which is not extended to others who are not public officials or the relatives or members of the household of public officials on the same terms and conditions; or for valuable consideration less than that required from others who are not public officials.
- (28.) **“Goods and Services”** or “Goods or Services” have the meaning set forth in ORS 279A.010(1)(j).
- (29.) **“Interstate Agreement”** means any agreement between the College and a unit of local government or state agency of another state.
- (30.) **“Invitation to Bid” (ITB)** means the Solicitation Document issued to invite Offers from prospective Contractors pursuant to either ORS 279B.055 or 279C.335.
- (31.) **“Life Cycle Costing”** means the total cost of ownership, including the total cost of acquiring, operating, maintaining, supporting, and if applicable, disposal.
- (32.) **“Local Contract Review Board” (LCRB)** means the LCRB and/or Board of Education as established by Board resolution or ordinance by each respective College adopting these Community College Rules of Procurement, to serve as its public contract review authority.
- (33.) **“Lowest Responsible Bidder”** as defined in ORS 279A.010(1)(r) means: (a) the lowest bidder whose Offer substantially complies with the requirements and criteria set forth in the Invitation to Bid and with all prescribed public procurement procedures and requirements; or (b) When the Invitation to Bid specifies or authorizes the award of multiple contracts to the responsible bidders, the bidders whose bids substantially comply with the requirements and criteria set forth in the Invitation to Bid and with all prescribed public procurement procedures and requirements and who qualify for the award of a public contract under the terms of the Invitation to Bid. (ORS 279B.055(10); and who has met the standards of responsibility set forth in ORS 279B.110(2) or 279C.375, has not been debarred or disqualified by the College under ORS 279B.130 or 279C.440, and is not on the list created by the Oregon Construction Contractors Board under ORS 701.227, if the advertised contract is a Public Improvement Contract. Depending upon the requirements of the Solicitation Document, “Lowest Responsible Bidder” may also mean one who, in the determination of the Advocate for Minority, Women and Emerging Small Businesses, has undertaken both a policy and practice of actively pursuing participation by minority and women-owned business in all bids, both public and private, submitted by such bidder, pursuant to ORS 200.025 and 200.045, or a business enterprise that is owned or controlled by or that employs a disabled veteran, as defined in ORS 408.225.

- (34.) **“Model Rules”** means the State of Oregon’s Attorney General’s model rules of procedure for Public Contracting, which are set forth in OAR Chapter 137, divisions 46, 47, 48, and 49, and required under ORS 279A.065.
- (35.) **“ORPIN” System:** The on-line electronic Oregon Procurement Information Network (ORPIN) administered through the State Procurement Office of the Procurement, Fleet and Surplus Services Division of the Oregon Department of Administrative Services.
- (36.) **“ORS”** means Oregon Revised Statutes.
- (37.) **“Offer”** means a “Written” offer to provide Goods or Services in response to a Solicitation Document.
- (38.) **“Offeror”** means a Person, who submits an Offer.
- (39.) **“Opening”** means the date, time and place specified in the Solicitation Document for the public opening of Offers.
- (40.) **“PCC”** means Public Contracting Code as it is defined in ORS 279A.010(1)(bb).
- (41.) **“Person”** means any of the following with legal capacity to enter into a Contract: individual, corporation, business trust, estate, trust, partnership, Limited Liability Company, association, joint venture, governmental agency, public corporation or any other legal or commercial entity.
- (42.) **“Personal Property”** means everything subject to ownership, which is not real property and has exchangeable value; includes all chattels and movables, such as boats and vessels, merchandise and stock in trade, furniture and personal effects, goods, livestock, vehicles, farming implements, movable machinery, movable tools and movable equipment pursuant to ORS 307.020.
- (43.) **“Personal Services Competitive Solicitation”** means a documented process providing an equal and open opportunity to qualified parties, which culminates in a selection based on criteria that include, but are not limited to, the Contractor’s availability, capacity, experience, reputation, responsiveness to time limitations, responsiveness to solicitation requirements, quality of previous performance and fees or costs.
- (44.) **“Personal Services Contract”** or **“Contract for Personal Services”** means a Contract or member of a class of Contracts for Personal Services, other than a Contract for the services of an Architect, Engineer, Photogrammetrist, Transportation Planner, Land Surveyor or Provider of Related Services as defined in ORS 279C.100 that the College’s Local Contract Review Board has designated as a Personal Services Contract pursuant to ORS 279A.055, whose primary purpose is to acquire specialized skills, knowledge and resources in the application of technical or scientific expertise, or the exercise of professional, artistic or management discretion or judgment, including, without limitation, a Contract for the services of a(n): accountant; physician, dentist or lawyer; educator; information technology professional, travel, banking, investing, collections, or other consultant; broadcaster or artist (including a photographer, filmmaker, painter, weaver, or sculptor). “Personal Services” is also defined in ORS 279C.100, and that definition applies only to ORS 279C.100 to 279C.125 for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning, Land Surveying Services or Related Services. Contracts for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning, and or Land Surveying Services, and Related Services are designated as a special class of Personal Services Contracts, defined in ORS 279C.100(5). (See also Personal Services Contracting Rules section within these Community College Rules of Procurement for an expanded definition.)
- (45.) **“Personal Services Contractor”** means an Independent Contractor that performs a Contract for Personal Service(s) for the College, when the College has no right to and does not control the means and manner of performing the contract, except as to the delivery schedule, determining compliance with the Statement of Work, and accepting or rejecting the deliverables or results required under the Contract.
- (46.) **“Prequalification of Offeror”** means a process followed by the College, in advance of issuance of Solicitation Documents, to determine the qualifications of prospective Offerors to perform Public Contracts.
- (47.) **“Product Sample”** means the exact Goods or a representative portion of the Goods offered in an Offer, or the Goods requested in the Solicitation Document as a sample.
- (48.) **“Proposal”** means a “Written” response to a Request for Proposals.
- (49.) **“Public Contract”** means a sale or other disposal, or a purchase, lease, rental or other acquisition, by the College of personal property, services, including personal services, public improvements, public works, minor alterations, or ordinary repair or maintenance necessary to preserve a public improvement. (ORS 279A.010(1)(z)).
- (50.) **“Public Notice”** means a public notice of Solicitation Document that is published electronically or at least once in at least one newspaper of general circulation in the area where the Contract is to be performed, in at least one trade newspaper of statewide circulation if the Solicitation Document is for a public improvement and the Contract has an

estimated cost in excess of \$125,000, and in as many additional issues and publications as the College determines is likely to be cost effective.

- (51.) **“Recycled Materials”** means recycled paper (as defined in ORS 279A.010(1)(gg)), recycled PETE products (as defined in ORS 279A.010(1)(hh), and other recycled plastic resin products and recycled products (as defined in ORS 279A.010(1)(ii).
- (52.) **“Request for Proposals”** or **“RFP”** means all documents used for soliciting Proposals in accordance with either ORS 279B.060 or 279C.110, where proposal evaluation and contract award is based on criteria such as proposer qualifications and experience, product features and characteristics, service quality and efficiency, and conformance with the specifications and requirements of the Solicitation Document. Price may be evaluation criterion for an RFP, but will not necessarily be the predominant basis for contract award.
- (53.) **“Request for Qualifications”** means a Written document issued by the College, to which Contractors respond in Writing by describing their experience with and qualifications for the Services, Personal Services, or Architectural, Engineering, Photogrammetric Mapping, Transportation Planning, or Land Surveying Services, or Related Services, described in the document.
- (54.) **“Request for Quotations”** means a Written or oral request for prices, rates or other conditions under which a potential Contractor would provide Goods or perform Services, Personal Services or Public Improvements described in the request.
- (55.) **“Requirements Contract”** means a price agreement that constitutes a firm Offer by the Contractor, regardless of whether any order or purchase has been made or any performance has been tendered under the price agreement and is enforceable for the period stated in the price agreement and is not revocable by the Contractor. A price agreement does not constitute an exclusive dealing commitment on the part of the College or the Contractor unless the price agreement expressly so provides. (ORS 279B.140)
- (56.) **“Responsible”** means meeting the standards set forth in OAR 137-047-0640 or 137-049-0390(2), and not debarred or disqualified by the College under OAR 137-047-0575 or 137-049-0370.
- (57.) **“Responsible Offeror”** (also, **“Responsible Bidder”** or **“Responsible Proposer,”** as applicable), means a Person that has submitted an Offer and meets the standards set forth in OAR 137-047-0640 or 137-049-0390(2), and that has not been debarred or disqualified by the College under OAR 137-047-0575 or 137-049-0370. When used alone, **“Responsible”** means meeting the aforementioned standards.
- (58.) **“Responsive Offer”** means, as the context requires, a **Responsive Bid** or **Responsive Proposal**, or other Offer that substantially complies in all material respects with applicable solicitation requirements. When used alone, **“Responsive”** means having the characteristic of substantially complying in all material respects with applicable solicitation requirements.
- (59.) **“Service Contract”** means a Contract that calls primarily for a Contractor’s time and effort rather than for an end product
- (60.) **“Signature”** means any “Written” mark, word or symbol that is made or adopted by a Person with the intent to be bound and that is attached to or logically associated with a “Written” document to which the Person intends to be bound.
- (61.) **Signed”** means, as the context requires, that a “Written” document contains a Signature or that the act of making a Signature has occurred.
- (62.) **“Solicitation”** means: (a) a request by the College for the purpose of soliciting Offers. This request may take the form of an Invitation to Bid, a Request for Proposal, a Request for Quotation, a Request for Qualifications or a similar document; or (b) the process of notifying prospective Offerors that the College requests such Offers; or the Solicitation Document itself.
- (63.) **“Solicitation Document”** means an Invitation to Bid, Request for Proposals, Request for Quotations, or other similar document issued to invite Offers from prospective Contractors pursuant to ORS Chapter 279B or 279C. The following are not Solicitation Documents if they do not invite Offers from prospective Contractors: a Request for Qualifications, a prequalification of bidders, or a request for product prequalification.
- (64.) **“Special Procurement”** means, unless the context requires otherwise, a Class Special Procurement, a Contract-Specific Special Procurement or both (ORS 279B.085). A “Class Special Procurement” means a contracting procedure that differs from the procedures described in ORS 279B.055, 279B.060, 279B.065 and 279B.070 and is for the purpose of entering into a series of contracts over time for the acquisition of a specified

class of goods or services (ORS 279B.085(1)(a)). “Contract-Specific Special Procurement” means a contracting procedure that differs from the procedures described in ORS 279B.055, 279B.060, 279B.065 and 279B.070 and is for the purpose of entering into a single contract or a number of related contracts for the acquisition of specified goods or services on a one-time basis or for a single project (ORS 279B.085(1)(b)).

- (65.) **“Specification”** means any description of the physical or functional characteristics, or of the nature of a supply, service or construction item, including any requirement for inspecting, testing or preparing a supply, service or construction item for delivery and the quantities or qualities of materials to be furnished under a Contract. Specifications generally will state the result to be obtained and may, on occasion, describe the method and manner of doing the Work to be performed. Specifications may be incorporated by reference and/or through attachment to the Contract.
- (66.) **“Standard Fee Contract”** means a contract awarded for service to be performed for a standard fee, when the standard fee is established by the College, and a like Contract is available to all qualified applicants.
- (67.) **“Statement of Work”** means a “Written” statement that specifically describes the phases of Work or services, major tasks, or areas of responsibility the Contractor is to perform at a particular site, or within a particular locale during a stated period of time, according to a schedule of delivery. The statement must identify specific objectives that the Contractor is to attain or describe, in detail, and the deliverables that the Contractor is to provide.
- (68.) **“Telecommunications”** means 1-way and 2-way transmission of information over a distance by means of electromagnetic systems, electro-optical systems, or both.
- (69.) **“Work”** means the furnishing of all materials, equipment, labor and incidentals necessary to successfully complete any individual item in a Contract or the entire Contract, and successful completion of all duties and obligations imposed by the Contract.
- (70.) **“Writing”** means letters, characters and symbols inscribed on paper by hand, print, type or other method of impression, intended to represent or convey particular ideas or meanings. “Writing,” when required or permitted by law, or required or permitted in a Solicitation Document, also means letters, characters and symbols made in electronic form and intended to represent or convey particular ideas or meanings.
- (71.) **“Written”** means existing in Writing.

**SECTION 200 - PUBLIC CONTRACT SPECIAL
PROCUREMENTS General Contract Special
Procurements**

Advertising

CCR.202

The College may purchase advertising regardless of dollar amount without competitive bidding. Where it is determined to be cost effective, the College may publish its public notices electronically, via the college's or other public entity's electronic procurement system or World Wide Web site instead of, or in addition to, a newspaper of general circulation unless otherwise required by law.

Findings of Fact

1. By their nature, media sources are generally unique. Advertisements are placed in a particular source because of the specific audience that source serves.
2. Competition to furnish advertising space in daily newspapers of general, trade, or business circulation in the vicinity of the College is limited.
3. Cost savings are difficult to quantify where the sources are unique and not interchangeable. Where the volume of purchases warrants, the College may enter into advertising contracts in accordance with ORS 279B.065 and ORS 279B.070 whenever possible to maximize savings achieved through economies of scale.
4. Public notices may be advertised electronically and/or in a newspaper of general circulation in an effort to increase exposure and generate more widespread competition, except for public improvement contracts with an estimated cost in excess of \$125,000, which must be published in at least one trade newspaper of general statewide circulation (ORS 279C.360). Cost savings for increased competition are difficult to quantify, but the cost to the College for advertising may be significantly reduced where electronic advertising methods are utilized.

Conclusion of Compliance with Law

It is unlikely that this Special Procurement will result in favoritism in the awarding of public contracts or substantially diminish competition since all vendors, including Oregon businesses, are able to compete (ORS 279B.085(4)(a)), and it will enable the College to promote the public interest (ORS 279B.085(4)(b)(B)), by expediting its procurement processes while maximizing its circulation efforts and notice of bidding opportunities without compromising integrity for cost.

This rule satisfies the requirements of Oregon Revised Statute 279B.055(4)(c), wherein a Local Contract Review Board may, by rule or order, authorize public notice of bids or proposals to be published electronically instead of in a newspaper of general circulation if it is likely to be cost-effective.

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Bid Security and Bond Requirements, Waiver of

CCR.204

Pursuant to ORS 279C.390, the College may, at its discretion, exempt certain contracts or classes of contracts from all or a portion of the requirement for bid security and from all or a portion of the requirement that good and sufficient bonds be furnished to ensure performance of the contract and payment of obligations incurred in the performance.

The College may waive bid security requirements and/or performance/payment bond requirements pursuant to ORS 279C.390 and this rule under the following conditions:

- (1) If the contract is for a public improvement or a public work and the amount of the contract does not exceed \$75,000 or another threshold as indicated by rule amendment in Section 300, and the contractor has filed a public works bond with the State of Oregon Construction Contractors Board;
- (2) If the contract is not for a public improvement; or if the contract is for a public improvement that resulted from an alternative contracting method and the contract is only for pre-construction services;
- (3) Where bidders are drawn exclusively from a list of certified Emerging Small Businesses maintained by the Advocate for

Minority, Women and Emerging Small Business enterprise certified under ORS 200.055, or a business enterprise that is owned or controlled by or that employs a disabled veteran, as defined in ORS 408.225, and the College has been provided funds by the legislature for the purpose of assisting Emerging Small Businesses;

- (4) In cases of emergency, or when the interest or property of the College or the public agency or agencies for whose benefit the contract was awarded probably would suffer material injury by delay or other cause and a declaration of such emergency has been made in accordance with rules adopted under ORS 279A.065.

The College shall not use Bid or Proposal security to discourage competition. The Offeror shall forfeit Bid or Proposal security after award of the contract if the Offeror fails to execute the contract and promptly return it with any required Performance Bond and Payment Bond.

Conclusion of Compliance with Law

It is unlikely that this Special Procurement will result in favoritism in the awarding of public contracts or substantially diminish competition since all vendors, including Oregon businesses, are able to compete, it is reasonably expected to result in substantial cost savings to the College or to the public (ORS 279B.085(4)(b)(A)), and it will enable the College to otherwise substantially promote the public interest (ORS 279B.085(4)(b)(B)), by reducing costs of bidding and maximizing participation from Emerging Small Businesses.

This rule satisfies the requirements of ORS 279C.390 wherein a Local Contract Review Board may exempt certain contracts or classes of contracts from all or a portion of the requirement for bid security and from all or a portion of the requirement that good and sufficient bonds be furnished to ensure performance of the contract and payment of obligations incurred in the performance. Consequently, findings otherwise required by law are unnecessary here.

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Cooperative Procurement Participation

CCR.205

Examples of cooperative procurement participation may include, but not be limited to: Oregon Cooperative Purchasing Program (ORCPP), Organization for Educational Technology and Curriculum (OETC), Participating Oregon Community Colleges (POCC), National IPA, E&I Coop, NASPO, and US Communities Government Purchasing Alliance.

Pursuant to ORS 279A.205, 279A.210, 279A.215, and 279A.220, contracting agencies may participate in a joint, permissive, or interstate cooperative procurement and/or subsequent contract award resulting from any solicitation which has been accomplished in compliance with ORS, as if said agencies had generated the solicitation and made the award on their own behalf.

Comment

In general, the results of any solicitation, formal or informal, which has taken place under the requirements of ORS and has resulted in an award, and is current (i.e., not closed, terminated, in abeyance or in default), may be utilized by the College pursuant to ORS 279A.205, 279A.210, 279A.215, and 279A.220. Prior to the College engaging in a cooperative procurement, due diligence must be performed, best practices employed, and factors in the buying decision considered. Examples of these factors include: in-state preferences, legislatively-mandated or LCRB-approved socioeconomic programs that overlay public contracting and accompany the expenditure of public funds; sustainability objectives; administrative resources and capacity; contracting efficiencies; time constraints; member participation costs; and ability to leverage economies of scale.

Conclusion of Compliance with Law

Cooperative Procurement Participation is not an exemption from the competitive procurement requirements of law; therefore, the College has determined that findings of fact are not required. The awarding of contracts pursuant to this process should “provide effective outcomes that represent optimal value to the College and, to the greatest extent feasible, be consistent with market practices” (ORS 279B.010(1)). Consequently, findings otherwise required by law are unnecessary here.

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Donated Materials and/or Services

CCR.206

The College may authorize a Person to perform services and/or provide materials regardless of dollar amount, if:

- (1) The Person has agreed to donate all, or a portion of, the materials and/or services necessary to perform the work; and
- (2) The Person enters into a license or agreement with the College whereby the Person agrees to comply with the public contract requirements applicable to the particular project and any requirements that the College deems necessary or beneficial in order to protect the College.

Findings of Fact

1. Students, staff, contractors, and other community groups from time to time offer to donate all or a portion of their professional skilled services and/or materials, to help the College meet its facilities' and/or educational needs. The ability to take advantage of such donated materials and/or services enables the College to use its limited funds in other areas, and frequently results in improvements or services that the College would not otherwise be able to afford. This class special procurement thus has budgetary, operational, and public benefits.
2. This class special procurement enables the College to take advantage of these offers, while continuing to ensure that the requirements of the Public Contracting Code continue to be met.

Conclusion of Compliance with Law

It is unlikely that this class special procurement will encourage favoritism in the award of College Contracts or substantially diminish competition for College Contracts, because it will only apply when a Person donates all or part of the materials and/or services. In many instances, the donations are outside of the competitive market for goods and/or services. In many instances, the donations will enable the College to construct or complete projects that it otherwise would not be able to afford to do, and thus will not displace what would otherwise be a competitively solicited project. This class special procurement also substantially promotes the public interest because award of contracts pursuant to the procurement procedures in ORS Chapter 279B is not practicable in the case of donated goods and/or services.

The use of this class special procurement will result in substantial cost savings to the College, because the College is not required to pay for the goods and/or services if they are donated.

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Emergency Contracts (Including Oil or Hazardous Material Removal)

CCR.207

- (1) Pursuant to the requirements of this rule, the College may, at its discretion, enter into a public contract without competitive solicitation if an emergency exists. Emergency means circumstances that could not have been reasonably foreseen which create a substantial risk of loss, damage, interruption of services or threat to public health, welfare, or safety, and require prompt execution of a contract to remedy the condition (ORS 279A.010(1)(f)).
- (2) Regardless of the dollar value of the contract, when entering into an emergency contract the College shall:
 - (a) Make a written declaration of emergency, including findings describing the emergency circumstances that require the prompt performance of the contract, stating the anticipated harm from failure to establish the contract on an expedited basis; and
 - (b) Encourage competition to the extent reasonable under the circumstances; and
 - (c) Record the measures taken under subsection (b) of this section to encourage competition, the amounts of the bids, quotes or proposals obtained, and the reason for selecting the contractor.
- (3) Pursuant to ORS 279B.080, if an emergency exists as defined in subsection (1) of this rule, the Board of Education, its President, or another officer authorized by the College shall declare the existence of the emergency as required by subsection (2) of this rule, which shall authorize the College to enter into an emergency contract.
- (4) The written declaration of an Emergency and resulting contract are solely entered into at the discretion of the College's President or authorized officer.
- (5) If the total award exceeds the threshold for formal public bidding, the Board shall be notified at its next available public meeting and provided with an opportunity to discuss the emergency, the award, and ratification thereof.
- (6) Oil or Hazardous Material Removal: The College may enter into public contracts without competitive bidding, regardless of dollar amount, when ordered to clean up oil or hazardous waste pursuant to the authority granted the

Department of Environmental Quality (DEQ), under ORS 466.605 through 466.680 and such DEQ order necessitates the prompt establishment and performance of the contract in order to comply with the statutes regarding spill or release of oil or hazardous material that has created an emergency condition. In exercising its authority under this exemption:

- (a) The College shall:
 - (1) To the extent reasonable under the circumstances, encourage competition by attempting to make informal solicitations or to obtain informal quotes from potential suppliers of goods or services;
 - (2) Make written findings describing the circumstances requiring clean up or a copy of the DEQ order ordering such cleanup;
 - (3) Record the measures taken under subsection (a) of this section to encourage competition, the amount of the quotes or proposals obtained, if any, and the reason for selecting the contractor selected.
- (b) The College shall not contract pursuant to this exemption in the absence of an order from the Department of Environmental Quality to clean up a site with a time limitation that would not permit hiring a contractor under the usual competitive bidding procedures.

Findings of Fact

1. Under ORS 279B.080, public contracts may be exempted from the requirements of ORS 279B.050 if emergency conditions exist, which require prompt execution of the contract, subject to the additional requirements of ORS 279B.080.
2. ORS 279B.080 allows the Local Contract Review Board to adopt rules to allow the head of the contracting agency or a designated person to declare that an emergency exists and to establish procedures for determining when emergency conditions are present. Subsections (2)(a), (2)(b), and (2)(c) of this rule accomplish this.
3. When DEQ orders a public agency to remove or clean up hazardous material or oil, the public agency must respond within a very short time, which is stated in the DEQ order. This time period does not generally allow the agency to take the time necessary to solicit written bids or proposals for the work to be performed. The College would be liable for any delay in responding to DEQ orders to perform hazardous material removal or clean up.
4. This exemption, as it pertains to subsection (6), will not be used in those situations where there is no DEQ order to remedy the situation. Routine competitive procurement methods will be used where there is no DEQ order to act immediately. The college maintains open lists of vendors, who are interested in providing hazardous materials removal and clean up services. Whenever it needs hazardous material removal or disposal, the College makes use of these lists to solicit quotes, bids, or proposals as needed, in addition to advertising the procurement as required.
5. Cost savings are achieved through this exemption, because the college can be liable for DEQ penalties and fines, if it does not timely remove hazardous materials or oil as ordered. Serious risk in these situations could result in property damage or personal injury, if the College is slow to act.

Conclusion of Compliance with Law

Procurements made by the College in compliance with this exemption meet the requirements of emergency public contracts pursuant to: ORS 279B.050; 279B.080, and 279C.335.

It is unlikely that this exemption will encourage favoritism in the awarding of public contracts or substantially diminish competition for such contracts as required by ORS 279C.335(2)(a). If the College is under DEQ order to act immediately, the College will still attempt to obtain competitive quotes for the work to be performed as it has the ability and time to do so. Unless the College is faced with the quasi-emergency situation of a DEQ order to remove or clean up hazardous waste or oil, it will follow normal competitive procedures to obtain these services. The award of public contracts pursuant to this exemption will likely result in substantial cost savings to the College in these situations, as required by ORS 279C.335(2)(b), because the College must comply with the law and avoid and minimize risk to persons and property. Where possible, the College will seek competitive quotes for the work to be performed and will award the contract to the lowest, responsive and responsible proposer.

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Equipment Repair & Overhaul (Including Maintenance Agreements)

CCR.208

- (1) The College may enter into a public contract for equipment repair, maintenance agreements, or overhaul of equipment without competitive bidding, subject to the following conditions:
 - (a) Service and/or parts required are unknown, and the cost cannot be determined without extensive preliminary dismantling or testing; and/or
 - (b) Service and/or parts required are for sophisticated equipment for which specially trained personnel are required and such personnel are available from only one source;
 - (c) Maintenance agreements must be procured from the provider of the equipment and/or software being maintained in order to be valid, preserve warranties, provide the best possible service, or conform to other similar agreements being provided by the same provider for maximizing economy and/or servicing functions;
 - (d) The College shall conduct its procurement for equipment repair, maintenance agreements, or overhaul of equipment pursuant to methods and parameters established in (2) of this rule.
- (2) The following limitations shall apply:
 - (a) At the discretion of the College, if it is practical to competitively procure equipment repair, maintenance agreements, or overhaul of equipment using quotations or other forms of Solicitation Documents then these competitive processes shall be utilized. If not, the file should be documented with the reasons for invoking this exemption from competitive procurement, specifically supporting the impracticality of a competitive procurement.
 - (b) If the contract exceeds or is anticipated to exceed the thresholds for Small or Intermediate Procurements as these thresholds are defined in Section 300, the College shall document in its procurement file the reasons why a competitive procurement process was deemed impractical, and the College may directly enter into the contract.

Findings of Fact

The need for equipment repair or overhaul of equipment cannot always be anticipated by College staff. If a piece of equipment is broken or not working properly, the College incurs the cost of down time, possible replacement equipment rental fees, staff time, and other inconveniences or liabilities to its programs.

1. Generally, there are a limited number of vendors, who are able to perform repair or overhaul on a particular piece of equipment, because of its make or manufacture. Sophisticated equipment may require specially trained personnel available from only one source. Often, a piece of equipment will have a partial warranty in place, which will guarantee some savings to the College in the parts and/or labor needed to do the repair or overhaul. This warranty savings may only be achieved if the original manufacturer or provider of the equipment performs the necessary repair or overhaul.
2. The dollar limits on the use of this Special Procurement ensure that when the cost of the equipment repair or overhaul is expected to exceed threshold amounts for Small and Intermediate Procurements as these are defined in Section 300, the College will competitively procure, or if that is not practical or cost effective, declare an emergency or obtain a specific exemption from the president of the College or the president's designee, with notification to the LCRB to proceed with the purchase of the needed repair or overhaul.

Conclusion of Compliance with Law

It is unlikely that this Special Procurement will encourage favoritism in the awarding of public contracts or substantially diminish competition and is reasonably expected to result in substantial cost savings to the College for such contracts as required by ORS 279B.085(4), because the dollar amount of the exempted purchase (i.e., Special Procurement), may not exceed the thresholds established in Section 300 for Intermediate Procurements without additional notification and/or approval from the LCRB and/or the College president or the president's designee. Where it is practical, the College will competitively procure equipment repair, maintenance agreements, and overhaul of equipment; where it is impractical, written justification, provided by the department, will become part of the public record of the contract.

The awarding of public contracts pursuant to this exemption is reasonably expected to result in a cost savings to the College, as required by ORS 279B.085(4)(b)(A), because the College incurs direct and indirect costs from the moment equipment breaks down or becomes unusable. This Special Procurement only applies to equipment already owned by the

College. Time is of the essence in contracts for equipment repair, maintenance agreements, and equipment overhaul. The College must be able to purchase necessary services and parts as quickly as possible in order to minimize equipment down time and provide uninterrupted levels of service to support the College's educational initiatives.

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Federal Contracts, Purchases under

CCR.210

When the price of goods and services has been established by a contract with the federal government pursuant to a federal contract award, the College may purchase the goods and services in accordance with the federal contract. In exercising this authority under this class special procurement, the College must:

- (1) Include in the contract file a memorandum confirming the federal official who granted permission to the College to purchase under the federal contract; and
- (2) Include documentation in the contract file showing the cost savings to be gained from anticipated purchases from the federal contract.

Findings of Fact

1. Federal contracts for goods and/or services are established by federal agencies with private vendors through competitive processes, which meet the standards of the Public Contracting Code. These processes include open competitive bidding, to which all interested vendors are invited to participate. No Oregon company is excluded from, or disadvantaged in, participation in bidding on federal contracts. Thus the class special procurement has the public benefit of supporting a competitive selection process, while providing the operational and budgetary benefits to the College by avoiding the cost and delay of replicating the solicitation process.
2. The prices or rates for goods and services under federal contracts are based upon competitive bids or proposals. This rule requires the College to document the cost savings to be gained from the anticipated purchase(s) from the federal contract. Documentation might include competitive comparison of previous bid prices obtained from other sources, including local Oregon businesses.
3. This rule requires that the College obtain the permission of both the federal agency and the federal vendor to use the federal contract.

Conclusions of Compliance with the Law:

This class special procurement will not encourage favoritism or substantially diminish competition in the awarding of College contracts. All vendors, including Oregon businesses, are able to compete for the initial federal contract. Also, the College will not use a federal contract without agency and vendor permission.

This special procurement will result in substantial cost savings to the College. Federal contracts are based on competitive bidding, which result in the most advantageous price to the federal agency. Before it makes a purchase from a federal contract, the College will document the cost savings it will achieve by using the contract. These two facts will ensure that the College purchases the desired goods or services at the best price available. Further, by being able to take advantage of a competitive federal procurement, the College saves the cost of needlessly duplicating the solicitation process.

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Intellectual Property (Periodicals, Library Books, Proprietary Software Licenses, Art, and Other Products of the Creative Process)

CCR.212

If the contract is for the purchase of Intellectual Property, which shall include, but not be limited to, Periodicals, Library Books, Subscription Services, Proprietary Software Licenses, Art, and Other Products of the Creative Process, the College may contract for the purchase of the product(s) without competitive procurement, regardless of dollar amount when the product(s) are protected under copyright law or there is only one known supplier (e.g., manufacturer, copyright holder), available for such products.

Examples of copyrighted materials typically covered by this Special Procurement include, but are not limited to: magazines and other periodicals; textbooks; workbooks; curriculum kits; reference materials; audio tapes; video tapes; calculators such as those used for aircraft navigation; and most software and products of the visual, aural and written arts. It should be noted that if there is more than one supplier of copyrighted materials (especially software), and the product(s) are not being purchased directly from the writer, manufacturer or other original source, every attempt should be made to establish a competitive selection process in order to achieve the greatest economy.

Findings of Fact

1. By design, Intellectual Property is protected for the use of a single owner. Copyrighted products may not be duplicated by others without the express permission or license of the copyright holder.
2. Instructional initiatives define the various materials, which the college will purchase for use in its educational programs, and it is not uncommon for Intellectual Property to be produced by only one supplier (i.e., sole source), who may be the copyright holder or licensee.

Conclusion of Compliance with Law

This rule will not encourage favoritism or substantially diminish competition in the awarding of public contracts. The production and distribution of Intellectual Property is controlled by the copyright holder/owner, and may only be permitted through a sole source. This rule provides additional parameters for consideration that are complementary to the Public Contracting Code where competition does exist. It is not intended to diminish the College's ability to consider other factors or limit fair and open competition when arriving at best value. It is the policy of the State of Oregon that public contracting activities should provide effective outcomes that represent optimal value to the contracting agency, and to the greatest extent feasible, be consistent with market practices (ORS 279B.010(1)).

Additionally, pursuant to ORS 279A.025(2)(h), the Public Contracting Code does not apply to contracts for the procurement or distribution of textbooks; consequently, findings otherwise required by law are unnecessary when the procurement or distribution of Intellectual Property is specifically for textbooks—a subcategory of Intellectual Property.

* * * * *

Life Cycle Costing/Best Value

CCR.216

- (1) In determining the lowest bid or best proposal, in the award of a contract, the College may use the concept of life cycle costing if it complies with section (2) of this rule:
- (2) (a) At the time of writing specifications for the product, the College shall identify those factors which will have cost implications over the life of the product, and which, for evaluation purposes, will be used to adjust the bid or proposal price of the product;
- (b) The solicitation document shall set out clearly the factors and methodology to be used in life cycle cost adjustments; and
- (c) The results of life cycle costing adjustments shall be applied to the bid or proposal price of the product(s) offered, and the bid or proposal that results in the lowest overall ownership cost or "best value" as it is determined by ORS 279A.015(5), taking into account the life cycle costing adjustments, and other aspects of service and product quality, as well as pricing.

Conclusion of Compliance with Law

This rule provides additional parameters for consideration that are complementary to the Public Contracting Code while supporting impartial and open competition. It is not intended to diminish the College's ability to consider other factors when arriving at best value. As such, it is not an exemption or Special Procurement to the competitive bidding requirements of law. It is the policy of the State of Oregon that public contracting activities should provide effective outcomes that represent optimal value to the contracting agency, and to the greatest extent feasible, be consistent with market practices (ORS 279B.010(1)). Consequently, findings otherwise required by law are unnecessary here.

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Perishables (Chemicals, Food, Laboratory Supplies)

CCR.218

Competitive procurement need not be used for the procurement of perishables under this Special Procurement provided that the perishability and commensurate quality is of greater importance than the cost to the College.

Comment

If longevity is not an issue and multiple sources exist, standard procurement practices shall be utilized.

Findings of Fact

This rule permits such items as foodstuffs and scientific supplies, which have definitive shelf lives, and associated attributes such as quality and longevity, to be purchased without strict competitive processes based upon price. Shelf life and the associated attributes may be the determining factors.

The rule enables the buyer to decide on a source based upon time since manufactured, remaining shelf life, and interim quality, since various states of decay can affect the product.

Conclusion of Compliance with Law

It is unlikely that this Special Procurement will result in favoritism in the awarding of public contracts or substantially diminish competition, since all vendors, including Oregon businesses, are able to compete, it is reasonably expected to result in substantial cost savings to the College (ORS 279B.085(4)(b)(A)), and it will enable the College to otherwise substantially promote the public interest (ORS 279B.085(4)(b)(B)), through expediting its procurement processes without compromising integrity for cost.

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Personal Property, Used (Purchase of)
CCR.220

Competitive procurement need not be used for the procurement of Used Personal Property if the College has determined that the purchase will result in cost savings and will not diminish competition or encourage favoritism.

For purchases of used personal property or equipment costing \$25,000 or more, or an amount otherwise indicated in Section 300, the College shall, where feasible, obtain three competitive quotations, unless such comparisons are highly impractical to obtain. Procurement files pertaining to Used Personal Property shall contain documentation of price comparisons and attempts to secure competitive pricing as much as is practical.

When the value of any such purchase exceeds the threshold for Intermediate Procurements as that threshold is defined herein, Section 300, Supplementary Provisions of the Community College Rules of Procurement, such purchases shall be authorized and/or delegated only by the College President, who shall notify the LCRB of such purchases at the next regularly scheduled meeting of the LCRB.

Comment

Used Personal Property is property which has been placed in use by a previous owner or user for a period of time recognized in the relevant trade or industry as qualifying the personal property or equipment as “used,” at the time of purchase.

Used Personal Property generally does not include property or equipment of which the College was the previous or current user, whether under a lease, as part of a demonstration, trial or pilot project, or similar arrangement.

Findings of Fact

The additional liberty for purchasing used personal property is essential for those who participate in auctions or other spot sales, where it is impractical to utilize conservative procedures because of the necessities of the selling process.

Conclusion of Compliance with Law

This rule provides additional parameters for consideration that are complementary to the Public Contracting Code while supporting impartial and open competition as much as is practical. It is the policy of the State of Oregon that public contracting activities should provide effective outcomes that represent optimal value to the contracting agency, and to the greatest extent feasible, be consistent with market practices (ORS 279B.010(1)). Pursuant to ORS 279B.075(1) Used Personal Property may be considered a sole-source procurement, if it is available from only one source; written findings supporting this determination and conclusion shall be made by the College. Findings otherwise required by law to support this Special Procurement are unnecessary here.

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Price Regulated Items (Including Gas, Diesel Fuel, Heating Oil, Lubricants, Asphalts, CCR.222

Distilled Alcohol, Postage, and Certain Utilities)

The College may, without competitive bidding, contract for the direct purchase of goods or services where the rate or price for the goods or services being purchased is established by federal, state, or local regulatory authority (ORS 279A.025(2)(g) and ORS 279A.025(2)(j)). Regardless of whether fuel is price regulated, it may be procured via *spot purchases*, and such purchases may be combined on a single, written agreement such as an open purchase order between the supplier and the College, in an effort to reduce administrative costs to the College. Spot purchases are defined as one-time purchases occasioned by a small requirement (for example, one vehicle's tankful of gasoline), where the purchase is taking advantage of availability and the most favorable market conditions.

Comment

If competition exists and it is practical to solicit quotations, bids, or proposals for Price Regulated Items, then these procurement methods should be utilized in an effort to obtain best value.

Conclusion of Compliance with Law

Competition is not generally a relevant issue in the procurement of goods or services where the provider's rate or price of the goods or services being purchased is established by federal, state, or local regulatory authority, and the goods or services are provided through a sole source. Examples include: Postage, Sewer/Water Service, Garbage Service, Electricity, Etcetera. Since there is virtually no competition available within these price regulated items, and/or the amount of the non-regulated fuel acquisitions are *spot purchases* and are subject to market forces and availability, it is unlikely that this exemption will encourage favoritism in the awarding of public contracts or substantially diminish competition for public contracts. Consequently, findings otherwise required by law are unnecessary here.

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Requirements

Contracts

CCR.226

- (1) Requirements contracts, for the purposes of this Rule, mean price agreements, services agreements, and sales that may be established for the purposes of minimizing paper work, achieving continuity of product, securing a source of supply, reducing inventory, combining college requirements for volume discounts, standardization among agencies, and reducing lead time for ordering. The College may enter into requirements contracts whereby it is agreed to purchase supplies and/or services for an anticipated need at a predetermined price provided the contract is let by a competitive procurement process pursuant to the requirements of ORS 279A,B,C and these Rules or is a contract for the procurement of products or services from a qualified nonprofit agency for individuals with disabilities pursuant to ORS 279.850.
- (2) The College may purchase the supplies and/or services from a contractor awarded a requirements contract without first undertaking additional competitive solicitation.
- (3) The term of the contract including renewals, must not exceed the maximum term stated in the original solicitation.

Conclusion of Compliance with Law

This rule provides additional parameters for consideration that are complementary to the Public Contracting Code while supporting impartial and open competition as much as is practical. It is the policy of the State of Oregon that public contracting activities should provide effective outcomes that represent optimal value to the contracting agency, and to the greatest extent feasible, be consistent with market practices (ORS 279B.010(1)). Pursuant to ORS 279A.065(5)(a) and ORS 279A.070, a contracting agency may, in the exercise of authority granted under ORS 279A.050, adopt rules necessary to carry out the provisions of the Public Contracting Code; consequently, findings otherwise required by law are unnecessary when the College has determined it is in its best interests to purchase supplies and/or services utilizing a competitively procured requirements contract or price agreement.

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Resale—Items for

CCR.228

Competitive procurement processes need not be used for the procurement of product or services being purchased strictly for resale. This Special Procurement applies to products or services that are specifically for resale as opposed to internal use or consumption.

Findings of Fact

1. College Enterprise, Auxiliary Fund, and/or General Fund operations that compete in the open market need to be able to purchase products or services for resale without undue restrictions.
2. In order to compete in the open market, these operations must be knowledgeable, proactive, and stay abreast of current trends, consumer wants, tastes and desires, and be able to meet those needs in their offerings. Additionally, fund operators must be free to purchase products or services for resale that the consumers want even if it means having a limiting factor such as brand, functionality, price, or quality.
3. These operations must work as efficiently as possible to hold down their own costs as well as to present the goods or services to the public at a fair market price. Thus, they will be looking for the goods for resale at the most competitive prices and highest quality within their parameters.
4. In awarding contracts, these operations must ensure the appropriate amount of the product or service will be in stock or be readily available, received, or provided at the appropriate time. Ensuring that the products or services are available and of the proper freshness and quality may prevent the operation from conducting timely competitive buying.

Conclusion of Compliance with Law

It is unlikely that this exemption will encourage favoritism in the awarding of public contracts or substantially diminish competition, and it is reasonably expected to result in substantial cost savings to the College or to the public (ORS 279B.085(4)). Additionally, this Special Procurement will substantially promote the public interest as required by ORS 279B.085(4)(b)(B), in a manner that could not practically be realized under the requirements of ORS 279B.050, 279B.055, 279B.060, 279B.065, 279B.070 (Methods of Source Selection).

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Telecommunications

Services

CCR.230

- (1) In determining the appropriate procurement method for telecommunications services, the College must determine whether competition exists. The College may consider the following factors:
 - (a) The extent to which alternative providers exist in the relevant geographic and service market. The relevant market will vary with the geographic area and from service category to service category, depending on changes in the regulatory environment and competitive marketplace. Thus, the relevant market will depend on the facts and circumstances of each case. For example, an alternative local access service or private line provider might offer services in Portland, but not in Salem or the rest of the state;

- (b) The extent to which alternative services offered are comparable or substitutable in technology, service provided, and performance. (For example, if the College requires digital services, analog services are not comparable or substitutable, or if the College requires fiber optic technology, then copper, microwave, or satellite transmission technology may not be comparable or substitutable);
 - (c) The extent to which alternative providers can respond to the College's interests in consistency and continuity of services throughout its service area, volume discounts, equitable service for all users, centralized management, and limiting College liability. For example, to be considered as the College's telephone long distance provider, any long distance service vendor must be able to meet, support, and interface with the College's centralized automated billing requirements. The College must document for the record the findings on these factors or any other factors used in determining whether competition exists. In developing its findings, the College may solicit the information either through informal telephone or written contacts or through a formal request for information.
- (2) Upon determining that competition does not exist for the relevant service and geographical area, the College may proceed to secure the service on a sole source basis, as described in these Rules.

Findings of Fact

- 1. In some cases, the use of competitive procurement processes is either not practicable, advantageous, or in the College's best interest due to unforeseen circumstances, unreasonable costs, difficulty in locating vendors even after extensive searches, or where time constraints occur that are due to circumstances beyond reasonable control.
- 2. All practical measures will be taken to encourage competition when possible.

Conclusion of Compliance with Law

It is unlikely that this exemption from competitive procurement processes will encourage favoritism in the awarding of public contracts or substantially diminish competition, and it is reasonably expected to result in substantial cost savings to the College or to the public (ORS 279B.085(4)), since it would be an Exception, and would be due to extenuating circumstances. Additionally, this Special Procurement will substantially promote the public interest in a manner that could not practicably be realized by complying with requirements that are applicable under ORS 279B.055, 279B.060, 279B.065, or 279B.070 or under any rules adopted thereunder. (Stat. Auth: ORS 279B.075 and 279B.085, Sole-Source Procurements and Special Procurements, respectively.)

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PERSONAL SERVICES CONTRACTING RULES

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|-----------------|-----------------|------------------|
| Personal | Services | Contracts |
| CCR.250 | | |

- I. General
 - (1) A Contract for "Personal Services" is a Public Contract that calls for specialized skills, knowledge, and resources in the application of highly technical or scientific expertise, or the exercise of professional, artistic or management discretion or judgment. Qualifications and performance history, expertise, knowledge and creativity, and the ability to exercise sound professional judgment are typically the primary considerations when selecting a Personal Services Contractor, with price being secondary.
 - (a) Contracts for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning, Land Surveying Services, or Related Services are designated as a special class of Personal Services Contracts, defined in ORS 279C.100 (5), and that definition applies only to ORS 279C.100 to 279C.125. Contracts for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning, Land Surveying Services, or Related Services are not subject to the provisions of rule CCR.250 of the Community College Rules of Procurement, but are, instead, subject to the provisions of Division 48 of the *Oregon Attorney General's Model Public Contract Rules* as adopted by the College, and the Community College Rules of Procurement adopted by the College, excluding rule CCR.250.
 - (2) The College may waive the requirement for a competitive selection process and directly negotiate a Personal Services Contract, if the Contract Price is not more than the Minimum Threshold as this threshold is defined in

Section 300- Supplementary Provisions. Regardless of the dollar value of the contract, the College may, at its discretion, enter into a Personal Services Contract without complying with formal or informal solicitation requirements if an Emergency, as defined in CCR. 207 exists.

- (a) Unless there are compelling reasons not to do so, competitive selection processes for Personal Services contractors should take place at intervals not greater than five years after initial completion and acceptance of services.
 - (b) The screening and selection procedures for the award of Personal Services Contracts are governed by ORS 279A.055 and are subject to the competitive procurement provisions of the Personal Services Contracting rules and procedures adopted herein. Every contract for Personal Services shall be based upon these screening and selection procedures developed by the College. Personal Services Contracts are considered "public contracts" as defined in ORS 279A.010.
- (3) The College may enter into Personal Services Contracts with an independent contractor when:
- (a) The work to be performed requires specialized skills, knowledge and resources in the application of highly technical or scientific expertise, or the exercise of professional, artistic, or management discretion or judgment;
 - (b) The College will not control the means or manner of the contractor's performance, but must rely on the Contractor's specialized skills, knowledge and expertise to accomplish the work. Note: The College's reservation of the right to determine and modify the delivery schedule, evaluate the quality of completed performance, and accept or reject the completed performance does not mean that the College will control the means and manner of performance; and
 - (c) Selecting a Contractor primarily on the basis of qualifications, rather than price, in accordance with the provisions of the Personal Services Contracting Rules and Procedures adopted herein would most likely meet the College's needs and result in obtaining satisfactory contract performance and optimal value for the College.
- (4) Pursuant to ORS 279A.055(2), the College has the authority to designate certain service contracts or classes of service contracts as Personal Services Contracts. Personal Services Contracts may include, but are not limited to, contracts for services performed in a professional capacity such as:
- (a) Contracts for the services of an accountant;
 - (b) Contracts for the services of an attorney;
 - (c) Contracts for the services of a physician or dentist,
 - (d) Contracts for the services of an information technology consultant,
 - (e) Contracts for the services of a broadcaster;
 - (f) Contracts for services as an artist in the performing or fine arts including, but not limited to, any person identified as a photographer, filmmaker, painter, weaver, or sculptor;
 - (g) Contracts for services that are specialized, creative and research-oriented;
 - (h) Contracts for services as a consultant;
 - (i) Contracts for educational services;
 - (j) Contracts for investment services;
 - (k) Contracts for travel services;
 - (l) Contracts for banking services;
 - (m) Contracts for auditing services;
 - (n) Contracts for student loan and college receivables;
 - (o) Contracts for real estate services (ORS 279A.025(2)(f));
 - (p) Contracts for property management;
 - (q) Contracts for employee benefit insurance (ORS 279A.025(2)(r));
 - (r) Contracts for investments (ORS 279A.025(2)(q)(C));
 - (s) Contracts for energy savings performance contracts (ORS 279C.335(1)(f));
 - (t) Contracts for agents of record (examples where agents of record may be used are advertising, general insurance, sales of surplus property, workers compensation insurance, etcetera);
 - (u) Contracts for speakers, lecturers, and performers;
 - (v) Contracts for human custodial care services;
 - (w) Contracts for food service management;
 - (x) Contracts for telecourse providers;
 - (y) Contracts for actuarial services;

- (z) Contracts for web design services;
 - (aa) Contracts for branding services;
 - (bb) Contracts for process improvement services;
 - (cc) Contracts for student retention services; and
 - (dd) Contract for Title IX, accessibility, sexual harassment compliance review services.
- (5) Personal Services Contracts do not include:
- (a) Contracts, even though in a professional capacity, if primarily for equipment, supplies or materials, e.g., a contract to supply all hardware and standard software is not a Personal Services Contract, but a contract with a technology consultant to design or develop a new computer system is a Personal Services Contract;
 - (b) Contracts with a temporary service or personnel agency to supply labor, which is of a type that can generally be done by any skilled worker (e.g., janitorial, security guard, crop spraying, laundry, and landscape maintenance service contracts)
 - (c) Contracts for services of a trade-related activity, even though a specific license is required to engage in the activity. Examples are repair and/or maintenance of all types of equipment or structures.

II. Screening and Selection Procedures and Assistance

These rules set forth procedures for the College to follow when entering into Personal Services Contracts.

- (1) The policy of the College is to select Contractors based on demonstrated qualifications and competence to perform the required services, encourage competition, discourage favoritism and obtain services at a fair and reasonable price. The purpose of this rule is to specify the College's policies and procedures for screening and selection of Contractors to perform Personal Services.
- (2) The College shall comply with the procedures set out in these rules for screening and selecting Contractors to perform Personal Services Contracts.
- (3) The College shall provide Evidence of Competition for all Public Contracts where competition exists or justify entering into contracts by direct negotiation if an exemption from the screening and selection process is utilized. While qualifications are the primary criteria, whenever the College determines that the services offered by two or more individuals or firms are equally able to meet the College's needs and are of equal value, the College shall award the contract to the individual or firm offering the service at the lowest price.
- (4) The College may procure Personal Services from Contractors who are under contract with another governmental entity pursuant to a Cooperative Agreement as permitted and subject to ORS 279A.200 to 279A.225, if such action is Expressly permitted under the original contract and if the administering agency's solicitation and award process for the original contract is an open and impartial competitive process and uses source selection methods substantially equivalent to those specified in ORS 279B.055, 279B.060 or uses a competitive bidding process substantially equivalent to the competitive bidding process in ORS chapter 279C.

Conclusion of Compliance with Law

The requirements of this rule ensure that competition will be carefully addressed and protected, if the College finds it is in the public's best interest to competitively procure Personal Services. This rule satisfies the requirements of Oregon Revised Statute ORS 279A.055 wherein the College may enter into Personal Services contracts, subsequent to the Local Contract Review Board's designation of certain service contracts or classes of service contracts as personal services contracts. Consequently, findings otherwise required under ORS 279B.030 are unnecessary here.

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Solicitation Requirements

CCR.260

A. General

- (1) All formal solicitations must satisfy the requirements of this rule. Request for Proposals and Request for Qualifications must be in writing and must be advertised in accordance with the following procedures:
 - (a) All advertisements for a formal solicitation shall be placed in at least one publication of general circulation and in as many additional issues and publications as may be necessary or desirable to achieve adequate competition. At the option of the College, the College may publish its public notices electronically instead of,

or in addition to, a publication of general circulation. The advertisement(s) for a formal solicitation shall be first published and appear at least once, no fewer than fourteen (14) calendar days before close of the solicitation, unless the governing body of the College, its President, or another officer authorized by the College declares in writing that a shorter period is deemed necessary in the public interest for a particular procurement. Conversely, the College shall broaden and extend public notice if deemed necessary to serve the public's interest for a particular procurement; and

- (b) All advertisement(s) shall describe, at a minimum, a brief summary of the proposed contract, the services sought, where copies of the solicitation may be obtained, and the deadline for submitting a proposal.
- (2) The Solicitation Document must provide that the College may, at any time during the solicitation process, reject any or all proposals or cancel the solicitation without liability if it is in the public interest to do so.
- (3) Unless compensation is expressly provided for in the Solicitation Document, the Request for Proposals or Request for Qualifications must provide that the College is not responsible for any costs of any Offeror incurred while submitting Offers and that all Offerors who respond to solicitations do so solely at their own expense
- (4) The Solicitation Document must:
 - (a) Notify proposers of potential Solicitation Document addenda. Failure to provide such notice in any solicitation may prevent addenda from being incorporated into any resulting contract, and include protest procedures for all formal solicitation and selection.

B. Formal Selection Procedures

The College shall use a formal selection procedure whenever the cost of the services is estimated or anticipated to be equal to or more than the Intermediate Threshold for Personal Services contracts as this threshold is defined in Section 300-- Supplementary Provisions. Under these formal procedures, Requests for Proposals (RFP) or Requests for Qualifications must be advertised in at least one publication of general circulation or through electronic means as indicated in Section 200, Rule 202, and in as many other issues or electronic procurement systems and publications as may be necessary or desirable to achieve adequate competition.

- (1) Request for Qualifications. A Request for Qualifications may be used to determine whether competition exists to perform the needed services or to establish a list of qualified Contractors prior to issuing an RFP (Note: It is not mandatory that the College issue a Request for Qualifications; it may elect to forego using a Request for Qualifications before issuing an RFP.)
 - (a) At a minimum, the Request for Qualifications shall describe the particular specialty desired, the qualifications the Contractor(s) must have in order to be considered, and the evaluation factors and their relative importance. The Request for Qualifications may require information including, but not limited to: the Contractor's particular capability to perform the required services; the number of experienced staff available to perform the required services, including specific qualifications and experience of personnel; a list of similar services the Contractor has completed, with references concerning past performance; and any other information necessary to evaluate Contractor qualifications.
 - (b) A qualifications pre-submission meeting (voluntary or mandatory) may be held for all interested Contractors to discuss the proposed services. If the meeting is mandatory, the Request for Qualifications shall include the date, time and place of the meeting(s). Unless the Request for Qualifications establishes that competition does not exist or unless the solicitation process is canceled or all qualification statements rejected, all respondents (who met the published qualifications) shall receive a notice (or other materials as appropriate) of any required services and have an opportunity to submit an Offer in response to the College's subsequent RFP.
- (2) Request for Proposals. The RFP is used as a formal competitive solicitation that describes specific services to be performed within a defined period of time. The solicitation sets forth criteria and methods for screening, selecting and ranking the best proposal(s). The RFP may result in contracts with more than one provider.
 - (a) The RFP must either describe the situation and background for which Offers are being requested and state the outcome(s) desired, or propose a Statement of Work. The RFP must describe any conditions affecting the delivery of the services and the time period in which the services are to be completed. The RFP must, at a minimum, address the following information:
 - (i.) Minimum standards and qualifications required to be met by the Offeror(s) to be eligible to provide the services;

- (ii.) The evaluation process and criteria to be used to select the Contractor(s), including the weight or points applicable to each criterion. Information must include the manner in which the Offeror's cost and pricing proposal will be evaluated;
 - (iii.) A requirement to provide a list of similar services completed by the proposer(s) with references concerning past performance;
 - (iv.) The closing date and time of the solicitation and the delivery location(s) for proposals;
 - (v.) Reservation of the right to seek clarifications of each proposal, and the right to negotiate the Statement of Work within the scope of work described in the RFP;
 - (vi.) Reservation of the right to reject any or all Proposals, if such rejection would be in the public interest;
 - (vii.) Reservation of the right to cancel the solicitation, if such cancellation would be in the public interest;
 - (viii.) Contractual provisions that will be contained in the resulting contract;
 - (ix.) The possibility of interviews; and
 - (x.) Any other information to be used to evaluate, rank and select the best proposer(s). This should include, but is not limited to: anticipated contract award date, and at the College's discretion, funding information and budget requirements.
- (b) A pre-proposal meeting (voluntary or mandatory) may be held for all prospective Contractors to discuss the proposed services, solicitation provisions and contract requirements. The RFP shall include the date, time and place of the meeting(s).
- (c) An evaluation committee shall evaluate Proposals. The College's Purchasing Department shall provide the evaluation committee with guidelines for completing evaluations consistent with the process described in the RFP. The evaluation committee may consist of College employees and, if desired, members of the community with experience in related services. Evaluators shall be selected on the basis of their ability to provide an objective, impartial evaluation of the proposals. If there is a conflict of interest, the evaluator shall declare this in writing and shall be excluded from participating in the evaluation.
- (d) The proposal evaluation committee shall review, score and rank all responsive proposals according to the evaluation criteria in the RFP, which may include, but are not limited to, the following:
- (i.) Availability and capability to perform the work;
 - (ii.) Experience of key staff on comparable projects, or in performing comparable services;
 - (iii.) Demonstrated ability to successfully complete similar projects or perform similar services on time and within budget;
 - (iv.) References from past clients, public and private;
 - (v.) Performance history in meeting deadlines, submitting accurate estimates, producing quality work, and meeting financial obligations;
 - (vi.) Status and quality of any required licensing or certification;
 - (vii.) Knowledge and understanding of the required services as shown through the proposed approach to staffing and scheduling needs
 - (viii.) Fees or costs;
 - (ix.) Results from oral interviews, if conducted;
 - (x.) Availability of any specific required resources or equipment;
 - (xi.) Geographic proximity to the project or the area where the services will be performed;
 - (xii.) Identity of proposed subcontractors and their qualifications; and
 - (xiii.) Any other criteria deemed relevant to the provision of services.
- (e) Final ranking will be based on the evaluation criteria consistent with the process described in the RFP. Price will be considered, but will not necessarily govern selection of the Contractor(s).
- (f) Contracts entered into under the formal selection procedure may be amended, provided the original contract allows for the particular amendment and the services to be provided under the amendment are included within, or directly related to, the scope of the project or the scope of the services described in the solicitation document.

C. Informal Selection Procedures

The College may use an informal selection process to obtain services if the estimated fee or Contract Price is less than the Minimum Threshold for Personal Services Contracts, and the College shall use an informal selection process to obtain services if the estimated fee or Contract Price is more than the Minimum Threshold but less than the Intermediate Threshold for Personal Services Contracts as this threshold is defined in Section 300-Supplementary Provision, unless otherwise exempted.

- (1) The informal selection process shall solicit Offers from at least three qualified contractors offering the required services. Prospective contractors may be drawn from the ORPIN System and/or from the certified list of the Advocate for Minority, Women and Emerging Small Business or its list of Contractors. The College may place the solicitation on the ORPIN System and/or use the system-generated potential Offer list to meet the three (3) responses/proposals requirement for informal solicitations.
- (2) The informal selection process shall be competitive. The selection and ranking may be based on criteria including, but not limited to, each Offeror's:
 - (a) Particular capability to perform the services required;
 - (b) Experienced staff available to perform the services required, including each Offeror's recent, current, and projected workloads;
 - (c) Performance history
 - (d) Approach and philosophy used in providing services;
 - (e) Fees or costs;
 - (f) Geographic proximity to the project or the area where the services are to be performed; and
 - (g) Work volume previously awarded by the College, with the object of effecting an equitable distribution of contracts among qualified Contractors, provided such distribution does not violate the policy of selecting the most highly-qualified Contractor to perform the services at a fair and reasonable price.
- (3) All proposals received shall be reviewed and documented and the most qualified Contractor(s) selected.
- (4) If the scope of the services is revised to the extent that the estimated cost of the services is considered to be equal to or more than the Minimum Threshold as this threshold is defined in Section 300-Supplementary Provisions, and the services are still required, the College shall either (a) terminate the contract and issue a new solicitation using the formal selection procedures or procedures allowed by subsequent rules set forth in this Section, unless waived under the provisions of Section CCR.250 (I)(2), or (b) seek approval by the College's Local Contract Review Board for contract amendment.

D. Selection by Negotiation

- (1) The College may procure Personal Services with Contractors directly through negotiation if the Contract Price is less than the Minimum Threshold as this threshold is defined in Section 300-Supplementary Provisions.
- (2) If the scope of the services is revised to the extent that the estimated cost of the services is equal to or more than the Minimum Threshold as this threshold is defined in Section 300-Supplementary Provisions, the College shall solicit for a new Contractor(s) using applicable selection procedures under these rules.

Conclusion of Compliance with Law

This rule satisfies the requirements of Oregon Administrative Rule 137 chapter 047 wherein the College shall adhere to the informal and formal solicitation requirements. Consequently, findings otherwise required by law are unnecessary here.

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PUBLIC IMPROVEMENT CONTRACTS EXCEPTIONS AND EXEMPTIONS

Alternative Contracting Methods

CCR.280

The College may, at its discretion, exempt public improvement contracts from competitive bidding requirements utilizing Alternative Contracting Methods (ORS 279C.335(2)). These innovative contracting methods shall take into account market realities and modern practices that are consistent with the public policy of encouraging competition. Examples of Alternative Contracting Methods are Construction Manager/General Contractor Services (CM/GC), and Design-Build, Energy Savings Performance Contracts and other developing methods including but not limited to "performance contracting", "cost plus time" contracting, and "qualification plus project approach" contracting. .

The College shall adhere to ORS 279C.337 regarding the CM/GC contracting requirements as stated in OAR 137-049-0690.

The College shall prepare written findings that support the use of this exemption from competitive bidding and obtain approval from its Local Contract Review Board. A public hearing shall be held before final adoption (ORS 279C.335(5)) of the exemption. The findings must show compliance with ORS 279C.330, and shall include, but not be limited to, information regarding:

- (a) Operational, budget and financial data;
- (b) Public benefits;
- (c) Value engineering;
- (d) Specialized expertise required;
- (e) Public safety;
- (f) Market conditions;
- (g) Technical complexity; and
- (h) Funding sources but shall not be based solely on funding sources, such as a particular bond fund, or by the method of procurement.

Conclusion of Compliance with Law

The College must demonstrate that the use of this exemption is unlikely to encourage favoritism in the awarding of public contracts or substantially diminish competition for such contracts and will likely result in substantial cost savings to the College or the public (ORS 279C.335(2)). The requirements of this rule ensure that competition will be carefully addressed and protected, if the College's Local Contract Review Board finds it is in the public's best interest to use an Alternative Contracting Method. Consequently, findings otherwise required by law are unnecessary here except with regard to those related to CM/GC contracts as required under ORS 279C.337.

* * * * *

Donated Public Improvements

CCR.281

The College may authorize a Person to construct a public improvement without competitive bidding or other competitive process regardless of dollar amount, if:

- (1) The Person has agreed to donate all of the labor, materials and services necessary to construct the public improvement and perform the work; and
- (2) The Person enters into a license or agreement with the College whereby the Person agrees to comply with the public contract requirements applicable to the particular project, requirements of the Public Contracting Code, and any requirements that the College deems necessary or beneficial to protect the College.

Findings of Fact

- 1. Students, staff, contractors, and other community groups from time to time offer to donate all or a portion of their professional skilled services and/or materials, to help the College meet its facilities' and/or educational needs. The ability to take advantage of such donated materials and/or services enables the College to use its limited funds in other areas, and frequently results in improvements or services that the College would not otherwise be able to afford. This class special procurement thus has budgetary, operational, and public benefits.
- 2. This exemption enables the College to take advantage of these offers, while continuing to ensure that the requirements of the Public Contracting Code continue to be met.
- 3. ORS 279A.010 excludes projects for which no funds of a public entity are used from the definition of Public Improvement subject to the Code. This exemption will allow the College to take advantage of donated materials and/or services, where all or part of the project or funds used for the project are donated.

Conclusion of Compliance with Law

It is unlikely that this exemption will encourage favoritism in the award of College Contracts or substantially diminish competition for College Contracts because it will only apply when a Person donates all or part of the materials and/or services. Charitable donations are outside of the competitive market for construction services. In many instances, the donations will enable the College to construct or complete projects that it otherwise would not be able to afford to do, and thus will not displace what would otherwise be a competitively bid project.

The use of this class special procurement will result in substantial cost savings to the College because the College is not required to pay for the goods and/or services if they are donated.

* * * * *

First-Tier Subcontractors; Disclosure and Substitution

CCR.282

This rule amends (i.e., additions are indicated by *italics* and deletions are indicated by a line drawn through the word(s) that has been stricken.), Appendix A of these Community College Rules of Procurement (i.e., State of Oregon, Department of Justice, Model Public Contract Rules effective January 1, 2010, Division 49), as follows:

OAR 137-049-0360(2)(b) shall be replaced with:

“(b) The College may, at its discretion, ~~Open~~ Bids publicly immediately after the Bid Closing; ~~and~~ or it may open Bids publicly immediately following the deadline for submission of the first-tier subcontractor disclosure forms, or some other time as permitted or not prohibited by Oregon Revised Statutes.”

Conclusion of Compliance with Law

As this amendment to the Attorney General’s Public Contract Rules is not a Special Procurement or exemption from the competitive procurement requirements of law, the College has determined that findings of fact are not required.

* * * * *

Limited Negotiations with Bidder

CCR.283

I. Definitions

For purposes of this rule, the terms below shall be defined, as follows:

“College’s Cost Estimate” shall mean the fixed limit of construction cost that has been agreed upon by the College and the College’s consultant.

“Value Engineering and Other Options” refers to a process agreed upon by the College, which involves the lowest responsive, responsible bidder and may include other consultants to identify deletions or adjustments to the project to reduce the cost of such work.

“Significantly Changed” with reference to the scope of the project, shall mean deletion or adjustment of components of the project or elements of the work, which in the aggregate are estimated to cost in excess of twenty-five percent of the College’s Cost Estimate as originally designed.

II. Limited Negotiations and College’s Cost Estimate

(1) If a project is competitively bid and all the responsive bids from responsible bidders exceed the College’s Cost Estimate, the College may, prior to award, negotiate with the Lowest Responsible Bidder utilizing Value Engineering and Other Options to bring the contract price within the College’s Cost Estimate.

- (2) The College's negotiation with the Lowest Responsible Bidder shall not result in award of the contract to such bidder if the scope of the project is Significantly Changed from that specified in the Invitation to Bid at the time of bidding.
- (3) If the College elects to use the negotiation process under this rule, the College will not produce for public inspection prior to award or termination of the negotiation process, any records of the Lowest Responsible Bidder. After award of the contract or termination of the negotiation process, the College will make available for public inspection such records as are subject to inspection under any other provision of law.

III. Negotiation and Award Process

- (1) If the Lowest Responsible Bidder's Bid exceeds the College's Cost Estimate, the College may, but shall not be required to, negotiate with the Lowest Responsible Bidder to bring the cost of the project within the College's Cost Estimate.
- (2) If the College elects to negotiate with the Lowest Responsible Bidder, the College shall give written notice to the Lowest Responsible Bidder of its intent, within ten (10) days of bid Opening. The notice shall include disclosure to the Lowest Responsible Bidder of the College's Cost Estimate.
- (3) During any such negotiations, the Lowest Responsible Bidder's bid shall remain firm for the period prescribed in the Bid. At all times until such expiration of the Bid, and notwithstanding the occurrence of negotiations under this rule, the College shall have the right to accept the original Bid.
- (4) Upon and within five (5) days of receipt of the College's notice of intent to negotiate, the Lowest Responsible Bidder and the College's representative shall meet and present to each other, in writing, any proposals either may have for Value Engineering and Other Options to bring the project within the College's Cost Estimate.
- (5) The College and the Lowest Responsible Bidder shall negotiate in good faith regarding value engineering and other options, exerting their best efforts to bring the cost of the project within the College's Cost Estimate.
- (6) If the College and the Lowest Responsible Bidder are able to reach agreement through value engineering and other options to identify measures which bring the project within the college's Cost Estimate, but do not Significantly Change the scope of the project, such value engineering and other options shall be reduced to writing and signed by the Lowest Responsible Bidder as an amendment to its bid and will be incorporated into the Contract at the time of award.
- (7) Upon award, the terms and conditions of the amendment to the Bid shall be made public.
- (8) Any protest of this negotiation process shall be subject to the Protest Process specified in the Invitation to Bid.

Conclusion of Compliance with Law

This rule satisfies the requirements of Oregon Revised Statute 279C.340 wherein the College may negotiate with the lowest responsive, responsible bidder in accordance with rules adopted by the College. Consequently, findings otherwise required by law are unnecessary here.

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**SECTION 300 SUPPLEMENTARY PROVISIONS –
CONTRACTING RULES**

These Community College Rules of Procurement were drafted by participating statewide community college representatives with the intent that Sections 100 and 200 be adopted in their entirety and remain unchanged by their respective institutions unless modified by participating committee members at a later date and subsequently and unanimously ratified by their Local Contract Review Boards. Section 300 has been specifically set aside to address the unique philosophies, cultures, and/or concerns of the various community colleges, voting districts, and contract review boards. In the event of conflict between rules or sections within these Community College Rules of Procurement, the rules in Section 300 shall take precedence over the Appendices in Section 300, and the rules in Sections 100 and/or 200 except as otherwise expressly provided.

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Consultant Selection: Architects, Engineers, Photogrammetrists, Transportation Planners, Land Surveyors, and Providers of Related Services Contracts **CCR.301**

This rule amends (i.e., additions are indicated by *italics* and deletions are indicated by a line drawn through the word(s) that has been stricken.), Appendix A of these Community College Rules of Procurement (i.e., *Oregon Attorney Generals Model Public Contract Rules Division 48*), as amended from time to time), as follows:

OAR 137-048-0200(1)(b) shall be replaced with: “Small Estimated Fee. The Estimated Fee to be paid under the Contract does not exceed ~~\$75,000~~ \$100,000; or”

OAR 137-048-0200(1)(c) shall be replaced with: “Continuation of Project With Intermediate Estimated Fee. For Contracting Agencies where a Project is being continued, as more particularly described below, and where the Estimated Fee will not exceed

~~\$100,000~~ ~~\$250,000~~, the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying Services or Related Services to be performed under the Contract must meet the following requirements:

(A) The services consist of or are related to Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying Services or Related Services that have been substantially described, planned or otherwise previously studied in an earlier Contract with the same Consultant and are rendered for the same Project as the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying Services or Related Services rendered under the earlier Contract;

(B) The Estimated Fee to be made under the Contract does not exceed *\$100,000*

(C) The Contracting Agency used either the formal selection procedure under OAR 137-048-0220 (Formal Selection Procedure) or

the formal selection procedure applicable to selection of the Consultant at the time of original selection to select the Consultant for the earlier Contract; or”

OAR 137-048-0200(1)(d) shall be replaced with: “Continuation or Project With Extensive Estimated Fee. For Contracting Agencies where a Project is being continued, as more particularly described below, and where the Estimated Fee is expected to exceed

\$100,000, the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying Services or Related Services to be performed under the Contract must meet the following requirements:”

OAR 137-048-0210(1) shall be replaced with: “*The College* may use the informal selection procedure described in this rule to obtain a contract if the Estimated Fee is expected not to exceed *\$100,000*.”

OAR 137-048-0210(2)(b) shall be replaced with: “Provide a Request for Proposals to a minimum of *three (3)* prospective Consultants drawn from:

(A) Contracting Agency's list of Consultants that is created and maintained under OAR 137-048-0120 (List of Interested Consultants: Performance Record);

(B) Another Contracting Agency's list of Consultants that is created and maintained under OAR 137-048-0120 (List of Interested Consultants; Performance Record); or

(C) All Consultants that the Contracting Agency reasonably can locate that offer the desired Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying Services or Related Services, or any combination of the foregoing."

OAR 137-048-0210(5) shall be replaced with: "*The College* shall terminate the informal selection procedure and proceed with the formal selection procedure under OAR 137-048-0220 if the scope of the anticipated Contract is revised during negotiations so that the Estimated Fee will exceed \$100,000.

Conclusion of Compliance with Law

As this amendment to the Attorney General's Public Contract Rules, 2012, is not a Special Procurement or exemption from the competitive procurement requirements of law, the College has determined that findings of fact are not required. The requirements of this rule ensure that competition will be carefully addressed and protected, if the College finds it is in the public's best interest to competitively procure Architectural, Engineering, Photogrammetric Mapping, Transportation Planning, or Land Surveying Services

or Related Services Contracts. This rule satisfies the requirements of Oregon Revised Statute ORS 279A.055 wherein the College may enter into Personal Services contracts, subsequent to the Local Contract Review Board's designation of certain service contracts or classes of service contracts as personal services contracts, and ORS 279C.105 wherein a Local Contract Review Board shall adopt procedures for the screening and selection of persons to perform those services under ORS 279C.110 or 279C.120. Consequently, findings otherwise required by law are unnecessary here.

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Contract Amendments & Reinstatements

CCR.302

A. The College may award an amendment(s) to a Public Contract for additional work or product which is reasonably related to the scope of work under the original contract, including change orders, extra work, field orders, or other changes in the original specifications that increases the original Contract Price subject to the following conditions: (1) Contract amendments must be made in writing;

- (2) Amendments to Contracts must fall within the scope of the original solicitation. Amendments shall not be used to circumvent rules establishing approvals at certain monetary thresholds;
- (3) The original Contract was let by competitive bidding or alternate contracting method or is a Special Procurement that has been exempted from competitive processes;
- (4) Such amendment(s) shall not exceed a total of thirty-three percent (33%) of the original Contract Price for goods and services or twenty-five percent (25%) over the original Contract Price if the Contract is for public improvements, public works, or general trade services and the amount of the amended Contract is defined as a Small or Intermediate Procurement as these thresholds are defined in Section 300, "Public Contracts Under Certain Dollar Amounts," Supplementary Provisions of the Community College Rules of Procurement;
- (5) Such amendment(s) shall not exceed a total of fifty percent (50%) of the original Contract Price, if the original Contract price exceeds the threshold for Intermediate Procurements as this threshold is defined in Section 300, "Public Contracts Under Certain Dollar Amounts," Supplementary Provisions of the Community College Rules of Procurement, and the Contract is for public improvements, public works, or general trade services;
- (6) The Vice President/Chief Financial Officer or designee approves the amendment if the Contract is for a Public Contract, including a Public Contract for a Special Procurement, but may authorize the Director of Capital Projects/Facilities and Operations to approve amendments, if the Contract is for a public improvement, public work, or general trade services Contract.

The “Reinstatement of Expired Contracts” means the action of reinstatement of an expired Contract that was previously properly executed containing all the required approval signatures and following all required procurement processes. The College may approve reinstatement of an expired Contract if the following conditions are met:

- (1) The College determines concisely, in writing, that the failure to extend or renew the Contract in a timely manner was due to unforeseen or unavoidable conditions;
- (2) The written reinstatement justification is presented to Purchasing for approval within ninety (90) days after expiration of the original Contract; and
- (3) The reinstatement is exclusively for the purpose of permitting completion of the work or services for no additional compensation; or
 - (a) When the services are of a continuing or repetitive nature, which are compensated at an hourly, daily or similar periodic rate, the reinstatement either:
 - (i) Does not increase the rate of compensation; or
 - (ii) Does not increase the rate of compensation so as to exceed the rate of the increase determined by comparing the Portland, Oregon Metropolitan Area Consumer Price Index (all items), published immediately prior to the date the original contract was established with the same Index published immediately prior to the date of the reinstatement and extension.
- (4) When a Contract is reinstated pursuant to this Rule, the College may compensate the Contractor, at the rate of compensation established in the original Contract, for work performed in the interim between the expiration of the original Contract and the execution and approval(s) of the extension or amendment.
- (5) This rule authorizes only one reinstatement of a Contract.
- (6) No reinstatement of a Contract must modify the original contract except with respect to the time for performance.
- (7) If the reinstatement of a Contract pursuant to this rule raises the aggregate amount of compensation to a level that requires approval by the Local Contract Review Board, the College must obtain such approval before the extension becomes binding and before any services may be performed under the reinstated contract.
- (8) Once a Contract is reinstated, it is in full force and effect, as if it had not expired.

Stat. Auth: ORS 279A.065(5)(a); ORS 279A.070

Conclusion of Compliance with Law

Contracts are living entities. The work they represent is subject to change at any moment; contract amendments record and formalize those changes. Options for change orders are needed for contract administrators and contractors to perform the work in the most efficient manner. As the contract amendment process is not an exemption from the competitive procurement requirements of law, the

College has determined that findings of fact are not required. It is unlikely that this process will encourage favoritism in the awarding of public contracts or substantially diminish competition, and is reasonably expected to result in substantial cost savings to the College or to the public (ORS 279B(4)). Consequently, findings otherwise required by law are unnecessary here.

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Cumulative Awards of Small Contracts (i.e., Anti-Fragmenting Rule)

CCR.304

When the College awards a series of small contracts, other than Special Procurements subject to ORS 279B.085, with values less than or equal to \$100,000, intends to award a series of such contracts, or is likely to award a series of such contracts within one fiscal year, the sum of which will, or is likely to, meet or exceed \$100,000, and the Work of which is similar, identical, or within the same operational domain, the College shall submit findings to its Local Contract Review Board to the effect that:

- (1) The contracts are not intentionally fractionalized to avoid sealed, competitive public procurement; and,
- (2) Competition is not being diminished by the awarding of such contracts and the consequent avoidance of public advertising of the requirement; and,
- (3) Other requirements such as those of the Bureau of Labor and Industries, (prevailing wage rates), bonding, insurance and OMWESB (Office of Minority, Women and Emerging Small Business, reporting requirements), will not be avoided by the award of such contracts;

Or, the College shall formulate and issue a formal solicitation for the totality of such annual requirements, and shall, as a result of such solicitation, establish a requirements contract naming one or more qualified providers, for the provision of the required goods or services.

Conclusion of Compliance with Law

This rule is intended to apply to all goods, services, client services, public improvements, public works, maintenance, repair, supplies, and all other College requirements. Its purpose is to ensure that the College does not intentionally or inadvertently exceed the College's formal competitive procurement threshold requirement of \$100,000 without good cause. As Special Procurements may result in a series of Contracts over time or for multiple projects, and the Cumulative Awards of Small Contracts Rule is not an exemption from the competitive procurement requirements of law, the College has determined that findings of fact are not required.

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Educational & Institutional Cooperative Service, Incorporated (E & I)

CCR.306

Competitive procurement need not be used to conduct procurements through the Educational & Institutional Cooperative Service, Incorporated (E & I). The College is a member of this legally established purchasing cooperative through its membership with the National Association of Educational Buyers. To qualify for E & I membership, an organization must be exempt from federal taxes and be one of the following: non-profit college, university, private school, educational organization, hospital, health care group purchasing organization or institution. Purchases through the E & I Cooperative are exempt from competitive processes, regardless of dollar amount, from the requirements of competitive procurement, and the requirements contract provisions.

Findings of Fact

E & I is a member-owned, not for profit cooperative, which provides goods and services, at the best possible value, to its membership of close to 2000 tax-exempt colleges, universities, prep schools, hospitals, medical research colleges and hospital purchasing organizations located throughout the United States. E & I is positioned to aggregate volume and purchase collectively on a national basis. State contracts and local consortia contracts are sometimes not as advantageous to the College because of their limited services and offerings. E & I is leading a concerted effort to conduct competitive bidding in a manner acceptable to a substantial number of the fifty states.

Conclusion of Compliance with Law

It is unlikely that this Special Procurement will result in favoritism in the awarding of public contracts or substantially diminish competition since all vendors, including Oregon businesses, are able to compete, it is reasonably expected to result in substantial cost savings to the College or to the public (ORS 279B.085(4)), and it will enable the College to otherwise substantially promote the public interest (ORS 279B.085(4)(b)(B)), by expediting its procurement processes, eliminating procurement redundancies, and maximizing volume discounts achieved through the College's participation with a nationwide cooperative.

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Energy Management Controls Systems

CCR.308

Competitive procurement need not be used for Energy Management Controls Systems provided the hardware or software is required to match or be specifically compatible with existing equipment (*see Brand Names or Marks, "or Equal," Single Seller and Sole Source*), or that the items are available from only one source and the College has determined that competition does not exist.

In determining the appropriate procurement method for Energy Management Controls Systems or whether competition exists, the College may consider the following factors: the extent to which alternative services offered are comparable or substitutable in technology; service provided; performance; the extent to which latest upgrades and options are offered by the manufacturer; and downward compatibility; and the extent to which alternative providers can respond to the College's

interests in consistency and continuity of services throughout its service area, volume discounts, equitable service for all users, centralized management, and limiting College liability.

Conclusion of Compliance with Law

This rule will not encourage favoritism or substantially diminish competition in the awarding of public contracts. An energy management controls system is essentially a system of data processors, input/output devices, field devices (thermostats, terminal control units, etc.), and software that result in energy-saving strategies. This rule provides additional parameters for consideration that are complementary to the Public Contracting Code where competition does exist. It is not intended to diminish the College’s ability to consider other factors or limit fair and open competition when arriving at best value. It is the policy of the State of Oregon that public contracting activities should provide effective outcomes that represent optimal value to the contracting agency, and to the greatest extent feasible, be consistent with market practices (ORS 279B.010(1)).

* * * * *

Exception (Including Sole Source) – Purchases of Goods or Services through CCR.310

Competitive procurement processes need not be used for the procurement of goods or services when the College makes a determination, based on written findings subject to ORS 279B.075(2), that the goods or services, or class of goods or services, are available from only one source, and the award of the Contract is approved, in writing, by the College’s chief financial officer or designee with such determination of sole source being placed on file in the Purchasing office or other designated official location; notification shall subsequently be given to the college’s Local Contract Review Board, if the amount of the contract exceeds \$100,000. The College is entitled to negotiate with any sole source Contractor to obtain a favorable price, terms, and/or conditions. This exception may be used for either a Contract or class of goods or services resulting in a series of Contracts, subject to these written findings, without submitting written findings for each subsequent request for a Contract, for no longer than five years, and is to be used infrequently and only when deemed by the chief financial officer or designee to be in the best interest of the College.

Findings of Fact

1. In some cases, the use of competitive procurement processes is either not practicable, advantageous, or in the College’s best interest due to unforeseen circumstances, unreasonable costs, difficulty in locating vendors even after extensive searches, or where time constraints occur that are due to circumstances beyond reasonable control.
2. All practical measures will be taken to encourage competition when possible.
3. The chief fiscal officer or designee will report to the Local Contract Review Board the reason(s) that competitive procurement processes were deemed to be impracticable and what steps, where possible, were taken to encourage competition if the acquisition exceeds \$100,000. A copy of the waiver shall be placed on file in the Purchasing office or other designated official location.

Conclusion of Compliance with Law

It is unlikely that this exemption from competitive procurement processes will encourage favoritism in the awarding of public contracts or substantially diminish competition, and it is reasonably expected to result in substantial cost savings to the College or to the public (ORS 279B.085(4)), since it would be an Exception, and would be due to extenuating circumstances. Additionally, this Special Procurement will substantially promote the public interest in a manner that could not practicably be realized by complying with requirements that are applicable under ORS 279B.055, 279B.060, 279B.065, or 279B.070 or under any rules adopted thereunder. (Stat. Auth.: ORS 279B.075 and 279B.085, Sole-Source Procurements and Special Procurements, respectively.)

* * * * *

Personal Services Contracts (CCR.250 Amended) CCR.312

This rule replaces and amends Personal Services Contracts Rule CCR.250(I.)(2) to read:

- (2) The College may waive the requirement for a competitive selection process and directly negotiate a Personal Services Contract, if the Contract Price is not more than the Minimum Threshold as this threshold is defined in Section 300-Supplementary Provisions, Rule CCR.312. “Minimum Threshold” means \$75,000; “Intermediate Threshold” means

\$100,000. Regardless of the dollar value of the Contract, the College may, at its discretion, enter into a Personal Services Contract without complying with formal or informal solicitation requirements if an Emergency, as defined in CCR.207 exists.

- (a) Unless there are compelling reasons not to do so, competitive selection processes for Personal Services contractors should take place at intervals not greater than five years.
 - (1) Informal Selection Procedures may be used for contracts less than or equal to the Minimum Threshold (i.e., \$75,000), but are not required to be used for contracts less than or equal to the Minimum Threshold.
 - (2) Informal Selection Procedures shall be used for contracts estimated or anticipated to be more than \$75,000, and which are not estimated or anticipated to be more than the Intermediate Threshold (i.e., \$100,000).
 - (3) Formal Selection Procedures shall be used for contracts estimated or anticipated to be more than the Intermediate Threshold (i.e., \$100,000), but may be used for contracts of any estimated dollar value if it is deemed to be in the college's best interest.
- (b) The screening and selection procedures for the award of Personal Services Contracts are governed by ORS 279A.055 and are subject to the competitive procurement provisions of the Personal Services Contracting rules and procedures adopted herein. Every contract for Personal Services shall be based upon these screening and selection procedures developed by the College. Personal Services Contracts are considered "Public Contracts" as defined in ORS 279A.010. Pursuant to ORS 279A.010(1)(kk), services designated as "personal services" under ORS 279A.055 are excepted from the definition of "services" and are, therefore, not subject to the Cost Analysis or feasibility determination requirements of ORS 279B.030, 279B.033, or 279B.036.

This rule replaces and amends Personal Services Contracts Rule CCR.250(I.)5) to read:

- (5) Personal Services Contracts do not include:
 - (a) Contracts, even though in a professional capacity, if primarily for equipment, supplies or materials, e.g., a contract to supply all hardware and standard software is not a Personal Services Contract, but a contract with a technology consultant to design or develop a new computer system is a Personal Services Contract;
 - (b) Contracts with a temporary service or personnel agency to supply labor, which is of a type that can generally be done by any skilled worker;
 - (c) Contracts for services of a trade-related activity, even though a specific license is required to engage in the activity. Examples are repair and/or maintenance of all types of equipment or structures;
 - (d) Employees or leased employees, except for those professional/managerial, leased employees retained under contract.
- (6) If the procurement is grant-funded, "Minimum Threshold" means the amount as identified by the grant-funding agency, if the grant-funding agency's threshold requirements are more restrictive than the College's. The College will follow the provisions of Personal Services contracting rules of the grant-funding agency and/or those of the College, or a combination thereof, as identified by the grantor.

Conclusion of Compliance with Law

The requirements of Rule CCR.250 and its subsequent amendment, CCR.312, ensure that competition will be carefully addressed and protected, if the College finds it is in the public's best interest to competitively procure Personal Services. This rule satisfies the requirements of Oregon Revised Statute ORS 279A.055 wherein the College may enter into Personal Services contracts, subsequent to the Local Contract Review Board's designation of certain service contracts or classes of service contracts as Personal Services Contracts. Consequently, findings otherwise required by law are unnecessary here.

* * * * *

Public Contracts Under Certain Dollar Amounts

CCR.314

- (1) The College shall submit recommendations for contract award to the Local Contract Review Board for contracts greater than \$100,000, subsequent to College policies and procedures contained herein and defined in Appendix A.
- (2) The College may, at its discretion, enter into Public Contracts not to exceed \$100,000 for the purchase of goods, materials, supplies, and services, including contracts for architectural, engineering, photogrammetric mapping, transportation planning, or land surveying services or related services, and public improvements or general trade services, without issuing a formal competitive Solicitation Document, if the College has determined that the awarding of

the contract without issuing a formal competitive Solicitation Document will result in cost savings and the following conditions are met:

- (a) The Contract is for a single project, and is not a component of or related to any other project;
 - (b) Due to the challenges in negotiating favorable or equivalent terms and conditions in the electronic marketplace, securing reasonable assurances regarding ownership/title of property, and the diminished capacity for the College to have recourse in the event the goods and/or services are not as indicated by the seller, procurements conducted via electronic commerce marketplace (e.g., eBay, Amazon, Google Shopping, NexTag, etcetera), are not permitted unless express authorization from the College's Chief Financial Officer or designee has been granted to the College's staff member(s) who is/are requesting to utilize or authorize the use of an auction transaction;
 - (c) When the amount of the Contract does not exceed \$10,000, defined herein as a "Small Procurement," the College shall, where feasible, obtain competitive quotes, unless the contract is for architectural, engineering, photogrammetric mapping, transportation planning, or land surveying services, or related services procedures in which case a Direct Appointment (see Appendix A, 137-048-0200), may be made for contracts with Estimated Fees less than or equal to \$75,000;
 - (d) When the amount of the Contract is more than \$10,000, but less than or equal to \$100,000, defined herein as An "Intermediate Procurement," and is not for architectural, engineering, photogrammetric mapping, transportation planning, or land surveying services, or related services, the College shall obtain a minimum of three informally solicited competitive quotes. At least one of the three quotes should be obtained from a disadvantaged, minority, women or emerging small business enterprise certified under ORS 200.055 or a business enterprise that is owned or controlled by or that employs a disabled veteran, as defined in ORS 408.225. The College shall keep a written record of the source and amount of the quotes received. If three quotes are not available, a lesser number will suffice provided that a written record is made of the effort to obtain the quotes;
 - (e) The College will abide by ORS 279A.025(4), regarding Qualified Nonprofit Agencies, unless the required goods, materials, supplies or services are unavailable from a Qualified Nonprofit Agency as provided in ORS 279.835 to 279.855;
 - (f) The College shall encourage certified disadvantaged, minority, women-owned or emerging small businesses to participate in its purchasing processes, where applicable, by notifying the Advocate for Minority, Women and Emerging Small Business as required by ORS 200.035; and
 - (g) The goods or services, or class of goods or services, are available from only one source and the determination of a sole source is based upon written findings in accordance with the provisions set forth in ORS 279B.075.
- (3) The College may, at its discretion, enter into Public Contracts not to exceed \$100,000, where competitive procurement processes have been waived pursuant to ORS 279B.075 and/or 279B.085, and the provisions of CCR.310, "Exception (Including Sole Source) – Purchases of Goods or Services through."
 - (4) The College may, at its discretion, enter into Public Contracts for trade-related projects, i.e., construction, maintenance, repair, or similar labor and materials contracts without competitive bidding if the College has determined that the awarding of the Contract without competitive bidding will result in cost savings and the following conditions are met:
 - (a) The Contract is for a single project, and is not a component of or related to any other project;
 - (b) When the amount of the Contract does not exceed \$10,000, the College should, where feasible, obtain competitive quotes (ORS 279B.065);
 - (c) When the amount of the Contract is more than \$10,000, but less than or equal to \$100,000 the College shall obtain a minimum of three competitive quotes. The College shall keep a written record of the source and amount of the quotes received. If three quotes are not available, a lesser number will suffice provided that a written record is made of the effort to obtain the quotes;
 - (d) When the Contract is a public improvement Contract of less than or equal to \$100,000, and the bidders are being drawn exclusively from a list of certified emerging small businesses maintained by the Office of Minority, Women and Emerging Small Business, the College may let the Contract without formal competitive bidding after a good faith effort to obtain a minimum of three competitive quotes from Emerging Small Businesses. To obtain maximum exposure for all firms and guard against favoritism, care shall be taken to obtain quotes from different firms each time the list is used. The College shall keep a written record of the source and amount of the quotes received and comply with the requirements, as applicable, of subsection (2)(e) of this rule. A lesser number will suffice provided a written record is maintained of the effort to obtain the quotes; and

- (e) When the Contract is for a “public improvement” as defined in ORS 279A.010(1)(cc) and/or for “public works” as defined in ORS 279C.800(6), and the Contract Price exceeds \$50,000 but is less than or equal to \$100,000, the College and the contractor shall comply with:
 - (i) The prevailing wage provisions of ORS 279C.800 to 279C.870, when applicable;
 - (ii) The contractor registration requirements of ORS 701; and
 - (iii) Any other law applicable to such a Contract.
- (5) If more than one supplier may be available and the total purchase is estimated to exceed \$100,000, the College shall select a contractor through a formal competitive solicitation process;
- (6) Pursuant to ORS 279C.105, when the Contract is for architectural, engineering, photogrammetric mapping, transportation planning, or land surveying services or related services, and the Estimated Fee is greater than \$100,000, the College shall screen and select a contractor through a formal competitive solicitation process as these procedures are defined in Appendix A, 137-048-0220, of these Community College Rules of Procurement.
- (7) Renegotiated Contracts for Supplies and Services:

The College may renegotiate the terms and conditions, including the Contract Price, of a Contract without additional competition and amend a Contract if it is in the best interest of the College subject to the following conditions:

 - (a) The College must determine that, with all things considered, the renegotiated Contract is at least as favorable to the College as the original Contract; and
 - (b) The renegotiated Contract will not have a total term greater than allowed in the original Solicitation Document, Contract or approval of a Special Procurement after combining the initial and extended terms. For example, a one-year Contract, renewable each year for up to four additional years, may be renegotiated as a two to five-year Contract, but not beyond a total of five years. Also, if Contracts with a single Contractor are restated as a single Contract, the term of the single Contract may not have a total term greater than any one of the prior Contracts.
 - (c) If a Contractor offers a lower price in exchange for a change in term or condition that was expressly rejected in the original solicitation, the amended Contract may be structured with this changed term as an optional, but not as a mandatory Contract term.
 - (d) If the Contract is the result of a Cooperative Procurement, the amended Contract must be within the Scope of the Original Contract and may not materially change the terms, conditions, and prices of the Original Contract.
- (8) If the procurement is grant-funded, “Minimum Threshold” means the amount as identified by the grant-funding agency, if the grant-funding agency’s threshold requirements are more restrictive than the College’s. The College will follow the provisions of the Public Contracting rules of the grant-funding agency and/or those of the College, or a combination thereof, as identified by the grantor.

Comment:

Public Contract shall mean the “*completed project cost basis*” of a Public Contract (i.e., the total cost of performing one discrete, identifiable totality of work, including all components, shipping, warranty costs, service agreements obtained in conjunction with the purchase contract, reimbursables, and any other associated costs).

Conclusion of Compliance with Law

This rule is more restrictive than the requirements of the Public Contracting Code. As such, it is not an exemption or Special Procurement to the competitive bidding requirements of law. Consequently, findings otherwise required by law are unnecessary here.

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Rejection of an Offer

CCR.316

This rule amends (i.e., additions are indicated by *italics* and deletions are indicated by a line drawn through the word(s) that has been stricken.), Appendix A of these Community College Rules of Procurement (i.e., *Oregon Attorney General’s Model Public Contract Rules* Divisions 47 and 49), *as amended from time to time*, follows:

ORAR 137-047-0640(1)(b) shall be replaced with:

“(b) The College ~~shall~~ *may* reject an Offer upon the College’s finding that the Offer:”

ORAR 137-049-0440(1)(b) shall be replaced with:

“(b) The College ~~shall~~ *may* reject an Offer upon the College’s finding that the Offer:”

* * * * *

Personal Property, Used (Purchase of)**CCR.319**

Competitive procurement need not be used for the procurement of Used Personal Property if the College has determined that the purchase will result in cost savings and will not diminish competition or encourage favoritism.

For purchases of used personal property or equipment costing \$25,000 or more, the College shall, where feasible, obtain three competitive quotations, unless such comparisons are highly impractical to obtain. Procurement files pertaining to Used Personal Property shall contain documentation of price comparisons and attempts to secure competitive pricing as much as is practical.

When the value of any such purchase exceeds the threshold for Intermediate Procurements \$ 5000 but less than or equal to \$100,000, such purchases shall be authorized and/or delegated only by the College Vice President of Administrative Services.

Comment

Used Personal Property is property which has been placed in use by a previous owner or user for a period of time recognized in the relevant trade or industry as qualifying the personal property or equipment as “used,” at the time of purchase.

Used Personal Property generally does not include property or equipment of which the College was the previous or current user, whether under a lease, as part of a demonstration, trial or pilot project, or similar arrangement.

Findings of Fact

The additional liberty for purchasing used personal property is essential for those who participate in auctions or other spot sales, where it is impractical to utilize conservative procedures because of the necessities of the selling process.

Conclusion of Compliance with Law

This rule provides additional parameters for consideration that are complementary to the Public Contracting Code while supporting impartial and open competition as much as is practical. It is the policy of the State of Oregon that public contracting activities should provide effective outcomes that represent optimal value to the contracting agency, and to the greatest extent feasible, be consistent with market practices (ORS 279B.010(1). Pursuant to ORS 279B.075(1) Used Personal Property may be considered a sole source procurement, if it is available from only one source; written findings supporting this determination and conclusion shall be made by the College. Findings otherwise required by law to support this Special Procurement are unnecessary here.

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Special Risk Insurance Policies**CCR.320**

Types of Special Risk Insurance Policies shall include, but not be limited to, policy/policies for: Accidental Death and Dismemberment for Board of Education Travel; Student Athletic Accident and Injury; College Volunteers; Day Care Students; optional Medical coverage for Students; and International Student (federally mandated), coverage. The College may, at its discretion, exempt Special Risk Insurance Policies from competitive bidding requirements, subject to the following conditions:

The College shall take into consideration market realities and determine:

- (a) Whether comparable benefits/services at competitive prices are available;
- (b) Contractor’s ability to assure continuous quality delivery of services;
- (c) If it is cost effective for the College to contract for the direct right for the insurer or the insurer’s agent; and
- (d) If applicable, whether Contractor’s past performance has been satisfactory.

Findings of Fact

- (1) In some cases, the use of a competitive procurement process is either not practicable, advantageous, or in the College’s best interest due to unforeseen circumstances, unreasonable costs, economies of scale, or difficulty in contracting for Special Risk Insurance Policies through the College’s competitively procured Insurance Agent of Record;

- (2) In some cases, the College selects the Contractor and makes available Special Risk Insurance Policies as a courtesy to staff/students, but the insurer/insured relationship is between the staff/student and the Contractor--not the College;
- (3) If competition exists and it is practical and cost effective to solicit quotations, bids, or proposals for Special Risk Insurance Policies, then these procurement methods should be utilized in an effort to obtain best value.

It is unlikely that this Special Procurement will result in favoritism in the awarding of public contracts or substantially diminish competition, and it is reasonably expected to result in substantial cost savings to the College or to the public (ORS 279B.085(4)), since multiple contract awards to independent brokers/agents may result, and it will enable the College to otherwise substantially promote the public interest (ORS 279B.085(4)(b)(B)), by minimizing administrative costs, expediting procurement processes, and maximizing efficiencies. The requirements of this rule ensure that competition will be carefully considered, if the College finds it is in the public's best interest to competitively procure Special Risk Insurance Policies.

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Fill in the [Professional Development Application](#). Include the following documentation as applicable:

- Reservations (hotel, car rental etc.)
- Airline reservations OR documentation of flight rates (if you haven't purchased tickets yet)
- Conference program/advertisement including cost and content of the activity
- Course description and cost

If in doubt, provide documentation. Applications containing all necessary documentation are generally processed faster.

All related expenses for professional development must adhere to LBCC Administrative Rules.

- [AR 5035-10 - Allowable Business-Related Expenses](#)
- [AR 5035-11 - Purchasing Card \(P-Card\) Procedure](#)
- [AR 5115-01 - Business/Travel Expense Reimbursement](#)

Please remember that per Article 19 of the Agreement between LBCC and LBCC Faculty Association, you agree to return to service for the college for at least three terms after the activity. Otherwise, all funds received may need to be repaid in full.

When is my application due?

Applications must be submitted to Amber Vore at least **five working days** before the activity begins. Supervisors do not approve or disapprove of requests for funds from the PD committee, but they must receive the application **five working days before the activity**.

When will I know if I got the grant?

The professional development committee meets once a month (date varies) to review applications submitted the prior month. For example, all grants applied for in the month of April are sent to the committee the first few days in May, and decisions would be made mid-May.

While You're There

1. Save receipts (hotel, airline, parking etc.). You do not need to save receipts from food.

When You Get Back

1. Fill out the [Voucher](#) for all expenses (hotel, air, parking, food per diem) within six weeks of your return. Attach your receipts. You must select **Amber Vore as the approver.** [Additional travel voucher instructions](#)
2. **All forms/receipts must arrive by June 30th to be reimbursed.**
3. Write a brief Post Activity Summary explaining what you learned and how you will apply that knowledge; this **MUST** be turned in to your supervisor/dean. For International and/or self directed activities, please also submit this with your reimbursement voucher.

Application forms

Use the appropriate form below:

- [Professional Development Application](#): For conferences, seminars and graduate credit course work.
- [Professional Development Leave Form](#): Used for extended periods of time for completion of project work, finishing a graduate degree or other certification related to the job assignment.

The Professional Development (PD) committee will consider an application after the activity has occurred as long as the application was received by the office before the activity date, assuming funds are available, and all approval criteria have been met. It is strongly advised to check account balances available with Amber Vore before leaving for an activity if the timeline is such that the committee will decide on the application after the activity dates. The PD committee will **NOT** consider allocating additional funds or redistributing funds after an activity has occurred except in extraordinary circumstances.

The PD committee considers applications on a first-come, first-served basis. Early applications are encouraged. Applications for the next fiscal year will be first considered beginning with the March meeting. Applications for an extended Professional Development Leave will be considered 2 times a year for the subsequent academic year; these will be in October and again in February of the application year. Committee members exist in every division and are available to assist in completing applications. If an applicant does not know who the committee representative is in the division, please consult the dean.

Two-year individual allowance is \$4,000. *This is for a rolling balance of the current and previous year expenses combined.*

Criteria for Approval

- The activity is directly related to the faculty member's professional assignment.

- The application is complete; the location, dates of activity and all itemized costs are clearly filled in.
- The application has an explanation component; this section should be clear, logical, sufficiently detailed and self-explanatory. The committee reserves the right to request additional information to approve an application if sufficient documentation is not supplied.
- Supporting documentation specifying activity content and costs is attached e.g. conference print out, flyer, course descriptions, flight and hotel information, mileage estimates from a reliable source e.g. mapquest.
- If a conference is held at a hotel and the costs exceed the lodging per diem, the higher amount will be allowed only if supporting documentation is provided. The applicant must show the conference is being held at the hotel for approval.
- Department and/or personal cost share is at least 10% of the total cost. Exception for this cost share is when the applicant is only applying for registration or tuition.

Cost Share

The applicant is responsible for determining if department funds are available to support the activity in advance; this includes coverage for substitutes for classes missed during PD activity or leave. The 10% cost-share may come from department funds OR personal funds OR a combination of the two.

Actual cost for substitute instructors is considered a department cost share and should be included on the application; consult the administrative assistant in your division to estimate this cost on application whenever possible. Place this entry into the “other” category on the form to show contribution by department.

The following are NOT considered cost-share components, nor will they be allowed in the final PD funds allocation by the committee.

- Department activities which include supervision of student groups or functions already covered by standard work responsibilities. This includes student field trips, coaching, mentoring of new faculty, peer coaching/training etc.
- Late registration fees to a conference or workshop.
- Fees associated with a college class e.g. technology, health or other institutional fees.
- Books and media (including software).
- Professional certification tests or preparation designed specifically for such a test.
- Thesis or research credits.
- Non-graduate level credit courses.

- Travel to on-going classes.
- Salary or wages (while on leave or during an activity).
- Curriculum development projects.
- Tips or personal expenses.

Eligibility of Application

- Each faculty member must submit his/her own application. It must be complete!
- Funding is not transferable to other activities or other faculty members.
- If a funded activity is postponed and falls within the same fiscal year, the funds are still available, but the PD committee must be notified of the change.
- Faculty on professional development leave will be given lower priority for activity funding than those using a regular PD Application grant form.
- When it is more economical due to the number of faculty participating to bring a workshop to LBCC, requests by a group of at least three individuals may be made to the committee using the Group Activities Form. Each group member's name and signature must accompany the request. If funded, the cost will be divided among the participating faculty members and charged to each individual's allocation.
- Carry-over funds (if available) from the previous fiscal year, can be used for group speakers with no charge to individual account balance up to \$3,000.

Supervisory concerns

- Supervisors do not approve or disapprove of requests for funds from the PD committee, but they **must** receive the application five working days before the activity. Applications are sent to the supervisor through LaserFiche once submitted and checked for completeness, and the supervisor/dean has 5 days to make comments on the application before it goes to the committee. Applications are approved and referred by the PD committee, but ultimately the decision for final funding is through the Office of the Vice President of Academic and Student Affairs.
- If the activity occurs on a contract day, faculty members are expected to discuss the impact of the absence on classes and other work assignments with their manager in a timely manner. Approval of funding by a committee does not release the applicant from work responsibilities.

Travel costs

- Applicants are asked to use the least expensive, timely mode of travel i.e. when air travel is less costly than mileage, this form of transportation will be considered the priority.
- Rental cars require justification during an activity. A written statement for private car use with mileage exceeding air or train transport also requires explanation for consideration.
- Meals and lodging are reimbursable at a per diem rate by travel location. For a complete listing of per diem rates by the specific location please consult <http://www.gsa.gov/>. Applicants must deduct meals covered by conference registration or the hotel.
- Lodging taxes should be entered as a separate line in the fillable form, and not included with the per diem lodging rate. It is best to consult the hosting accommodation site for a reliable estimate to include this in the application request.
- One additional night's stay is allowed to significantly reduce airline costs (include this in the justification statement as necessary with supporting documentation).
- If purchasing a rental car, you **MUST** purchase Loss of Revenue Insurance.
- Upon PD committee approval of an application, advance payments can be made to a vendor for expenses such as registration, travel tickets and lodging, but no cash advances are made.

International Travel

- International Travel will be covered, but faculty are required to provide extra documentation.
 - Prior to applying: Check if the country is on the [non-covered list](#) for our international travel insurance. Countries on the list that are not covered will require additional review and approval from Ann Buchele, VP of Academic and Student Affairs, and Lisa Avery, President. Additionally, you must check the [United States Travel Advisories](#). Countries at a level 3 will require additional review and approval by Ann Buchele and Sheldon Flom, and countries at a level 4 will require additional review and approval from Ann Buchele and Lisa Avery. If travel to any of these countries is approved, the faculty will need to work with Cliff Carpentier, Safety and Loss Prevention Director, to make sure the faculty has international travel insurance that will cover the individual faculty and meets all requirements for insurance.
 - Once initially approved: Any faculty who are approved must fill out an additional form and be required to submit: who is traveling, specific locations, a copy of the full itinerary, and the best way to contact them in the case of an emergency. This form will be approved by Cliff once he verifies the college has all necessary

information and discusses general international trip safety and insurance with the faculty member. **DO NOT use a pcard or college funds to pay for any part of your trip including hotel, registration, flights, etc. prior to this additional form being approved by Cliff. If this form is not completed and approved prior to the trip, no funds will be released and the trip will be unreimbursable by LBCC.**

Please note, to meet this requirement, you should begin the process for international travel well in advance.

- After the trip: Along with the normal receipts for reimbursement, the faculty will also need to attach the summary of their trip and what they learned/how they will apply the learning to their curriculum/courses that they submit to their dean. This summary should be detailed enough that if an outside auditor looks at the receipts and summary, they can clearly tell the purpose of the trip and the impact it has on the faculty member's courses and work at LBCC.

Reimbursements

Keep all receipts and travel vouchers during your activity. Fill out the Post-Activity Summary along with your receipts and the [Travel Voucher](#) for the appropriate year to Amber Vore within SIX weeks of the activity.

Forms and receipts submitted later than June 30th of a fiscal year will not be reimbursed. There are NO exceptions to this rule.

Tuition is reimbursed in full AFTER a receipt for the cost and a copy of a passing grade from the supporting educational institution are submitted – not during or before.

Reimbursements involving cars depend upon having a yearly [Driver Status Report Form](#) on file with the Campus Public Safety Office, RCH-119 [it is advisable to check that the report file is up to date before activity]. If it is not up-to-date, the reimbursement process will be delayed by several weeks.

Professional Leave (i.e. sabbatical)

As provided by the Faculty Contract, Article 20 – Leaves, “Each year, the college will grant the equivalent of two, full-time professional development leaves for a total of 90 credit equivalents. Each leave will be funded at the faculty member's regular full-time pay. These leaves may be granted for a portion of one term, for an entire term, or for up to three terms. A faculty member granted a professional development leave agrees to return to service for the College for an amount of time equal to twice the length of the leave. Otherwise, all funds the

staff member received under the leave from the College must be repaid in full." For further contract language related to Professional Development Leave of Absence, see Article 20.

Faculty members who have completed five years of full time service at LBCC are eligible for up to three terms of professional development leave of absence. Applicants for professional development leave of absence must be in good standing and not on probationary status or work improvement plan.

Professional development leave activities might include, but are not limited to, learning new instructional techniques related to the faculty member's instructional area, specific research or creative efforts related to the instructional area, or enrollment in studies to gain knowledge or to complete the requirements for a related degree or certificate. It is expected that leave objectives will serve the greater good of the college, the faculty member's department and the faculty member themselves. Upon return from leave, the faculty member is expected to share their experience with appropriate college colleagues. These activities may include but are not limited to, a workshop or presentation, dissemination of research findings, or training of other faculty members. The faculty member may also be asked to give a presentation to the LBCC Board of Directors.

Application deadline is the first Monday of February for all professional development leave of absence grants for the following academic year. In the event that all available leave time is not granted by the February round of applications, the professional development committee will again accept applications on the first Monday of October for leaves to be taken during winter and spring term of the same academic year. It is recommended that the faculty member's leave proposal be discussed with their supervisor prior to submission of the application. Applications will be reviewed by the committee within 30 days of the application deadline, with committee recommendations then forwarded to the college President for final approval.

After a leave begins, events may occur that will alter the faculty member's activities from those outlined in their original proposal. If a substantial change occurs, the professional development committee must receive notice of the revised plan. For a faculty member on partial leave, if the revised activity affects their non-leave workload, that change must be discussed with the faculty member's supervisor.

In awarding grants, priority will be given to those faculty members who have not had previous professional development leave. To be reviewed by the committee, applications must contain the following:

1. Completed application form
2. A description of the proposal including goals and objectives, a timeline for completion and a plan for sharing your experience with the college community

3. Supporting documents, including estimates of projected costs and letters of recommendation, where appropriate

The committee reserves the right to ask the applicant for additional explanation or documentation material if necessary for clarification. At a minimum, your request for leave must address the following:

Goals and Objectives

1. Clearly state the goals and objectives you plan to achieve by this leave.
2. Describe the activities you plan to accomplish your goals. Include a tentative timeline for achieving major goals for each term requested.

The following should also be addressed:

1. Discuss the proposal's value to yourself, your department and the college
2. Discuss the relationship of your proposal to your previous experience and/or your background
3. If appropriate, describe the proposal's collaborative components with other faculty, program representatives, mentors, etc.
4. If linked to a prior leave of absence, discuss how this proposal has additional value and how it is tied to your prior leave in terms of both goals/objectives and specific activities.
5. Discuss how you will implement the results of your leave into your role at LBCC.
6. Discuss your proposal for sharing your leave experience with the college. Discuss plans for presentations, workshops, shared curriculum, etc. as appropriate.

The Committee and How Professional Development Works

As part of the agreement between Linn-Benton Community College and the Faculty Association, Article 19, the Board of Education has made available funds to support professional development opportunities for faculty. Administrative authority for these monies rests with the College President following a review process by the Professional Development Committee.

Selection of Professional Development Committee

The committee members shall be selected by the Professional Development chairperson(s), in consultation with the Association President. To the fullest extent possible, its membership shall provide a wide representation of the variety of faculty positions that exist across campus plus the Center for Teaching and Learning Faculty Coordinator; a representative from Human Resources/Payroll (ex-officio, nonvoting); and the Faculty President (ex-officio and nonvoting).

Additional Committee Advisors and Proxies

The Faculty President will be notified of Professional Development Committee meetings, will receive copies of all proposals, and will serve as time permits in an advisory capacity to the committee. Committee members who cannot attend must email their comments and votes prior to the committee meeting.

Professional Development Responsibilities

The faculty accept reasonable responsibility for maintaining and enhancing their current skills. The institution also accepts reasonable responsibility for providing opportunities to bridge gaps in professional expertise that occur due to changing needs of the student populations, technological changes or rapid advances in knowledge in the fields represented by our programs and disciplines, and changes in learning/teaching methodologies. The divisions are responsible for funding curriculum development.

Flexibility and Consistency in Awarding Professional Development Funds

It is unrealistic to assume all faculty will need or want the same type, amount, or frequency of professional development opportunities. Thus, the paramount goal in recommending awards is to remain flexible enough to consider all options while maintaining an element of consistency. Professional Development activities may include workshops, seminars, additional educational coursework, research or projects, or any other form of professional development activity related to the faculty member's professional assignment. Professional development funds do not pay for memberships and licenses. Exceptions: Professional development funds will pay for the purchase of a membership if membership reduces the cost of a conference to such a degree that it is cheaper to buy the membership than to pay the full cost of the conference without membership.

Role of Supervisors

Supervisors do not approve or disapprove requests for funds from the Professional Development Committee, but the application must be submitted 5 working days prior to the event and the deans/directors will make comments on the application in relation to the faculty members goals before the application moves to the committee. If the activity occurs on a contract day, faculty members are expected to discuss the impact of this absence on classes and other work assignments with their manager in a timely manner. Approval of funding by the committee does not release the applicant from work responsibilities.

Time Frame for Application Review

Applications will be considered on a monthly basis. The committee usually meets the second week of the month. The committee will consider applications received by the support person by 5:00 p.m. of the first college business day of that month. Applications are considered on a "first come, first served" basis; therefore, getting applications in as early as possible is wise. Grant applications for activities occurring in the next fiscal year will not be considered before the March meeting. However, proposals for extended educational leaves of absence will be accepted as early as October 1 for the following academic year.

Bargaining unit members may choose to use professional development funds for activities, including workshops, seminars, conferences, research, educational course work, work experience programs, or any other form of professional development activity related to the member's instructional area and/or which would be of direct benefit to the educational program and the quality of instruction for which the member is or will be responsible.

CRITERIA FOR FUNDING

- Activity is related to teaching methodology and/or related to subject area being taught.
- Part-time faculty member is teaching 1 credit or more during the term the activity takes place during.
- Application is received prior to the activity.
- Preference will be given to in-state training/activities.

FUNDING

- Applications are considered on a "first-come, first-served" basis.
- Registration, meals, travel, lodging, and tuition are eligible for funding from Professional Development. Receipts must be provided for all reimbursable costs, except meals, which will be reimbursed up to **per diem rates**.
- Neither cash advances nor personal reimbursement will be made prior to the completion of the activity.
- There is a \$400 limit per bargaining unit member per fiscal year, July 1 - June 30. A bargaining unit member is given no guarantee of this yearly amount.

HOW TO APPLY

- **Part-Time Faculty Professional Development Application.** Applications must be received prior to the activity. Partially completed applications will be returned without consideration by the committee.
- **Required**
 1. Completed Non-contract Faculty Professional Development Grant Application.
 2. Documentation to verify activity costs, e.g., registration/tuition

form, air fare, meals, lodging, etc.

3. Documentation describing the schedule and educational content of the activity.

- If you are requesting mileage, you must turn in a completed Driver Status Report Form to Public Safety. Reimbursements for use of private cars or rental cars cannot be processed without this form on file. The **Driver Status Report Form** must be filed annually.
- If purchasing a rental vehicle, you **MUST** purchase Loss of Revenue Insurance.
- If the committee denies the grant application, the applicant will be responsible for any costs of attending the activity.

REIMBURSEMENT

- **IMPORTANT:** To receive your grant award, submit a **Voucher** with receipts with Amber Vore as approver within six weeks following your activity and prior to June 30.
- Failure to submit your receipts for reimbursement by the deadline will result in your encumbered award being returned to the Part-time Faculty Professional Development fund for redistribution to other bargaining unit members.
- For costs you may be requesting from your instructional department, a separate voucher will be required.

Professional Development is defined as “advancing personal and professional growth,” including seeking to earn or finish degrees, certificates & training. Classified Professional Development Funds are available to classified employees who have completed their new-hire trial period (6 months). This benefit provides classified employees the opportunity to gain additional education, training and experiences to enhance their career potential and personal growth. Classified employees are eligible for up to \$2000 for professional development during a two year period - the current period is July 1, 2021-June 30, 2023 (ie FY 22-23).

Some examples of professional development activities include: workshops, seminars, conferences, educational coursework or activities. Professional development requests that involve the employee’s use of work time require employee supervisor approval. Such requests shall not be unreasonably denied.

To apply, fill out the [Professional Development Application](#). Once approved and after completing the event, apply for reimbursement by submitting the [Voucher](#) to Amber Vore.

The application must be completed in its entirety and required information attached. Neither cash advances nor personal reimbursement will be made prior to the completion of the activity. Receipts must be provided for all reimbursable costs except food. Receipts must be submitted within six weeks following the activity, but **not later than June 30** in order to receive reimbursement.

Submitting the form:

- The [Professional Development Grant Application](#) **MUST** be submitted **prior to the start of the activity**. The committee will consider amendments to applications if received prior to the activity.
- The committee normally meets within the first 10 days of the month, and applicants will be notified shortly thereafter. If the activity occurs prior to the committee meeting and the committee denies the request, the employee/department will be responsible for all expenses.

Filling out the form:

- **Personal and/or department contributions** are required to compose a minimum of 10% of the total cost of the activity. The only exception is registration & tuition for classes.

- **Travel miles** are calculated from the closest location (LBCC or your home address) to PDX/Eugene Airport or the activity.
 - Compute number of miles using a mileage chart/calculator.
 - If requesting mileage reimbursement, turn in a completed **Driver Status Report Form** to the Campus Public Safety Office prior to requesting reimbursement.
 - Include receipts for transportation other than mileage. If you are estimating cost, please make note under "Additional Comments."
 - If purchasing a rental vehicle, you **MUST** purchase Loss of Revenue Insurance.
- **Meals** are reimbursed at the **Per Diem rate**.
 - Per diem (Meals and Incidental Expenses (M&IE) is reimbursable by travel location. The daily per diem rate is reimbursable at 75% on the first and last day of travel and should be reduced by 25% for each meal provided by an event or the hotel. Meals without an overnight stay are not reimbursable unless they are associated with college business (see AR 5115-01). To determine which per diem rate applies for your primary destination, **see the GSA webpage**.
- **Lodging** should be paid by LBCC procurement card. **Itemized receipts are required.*
 - Report only room price and taxes.
 - Lodging is covered up to the locality rate established by the US General Service Administration plus applicable taxes; the only exceptions are for lodging at conference/convention hotels, which may exceed the GSA rate. For destination lodging per diem rates, **see the GSA webpage**.
- **Tuition** for approved course work will be reimbursed at actual cost to the classified member, to a maximum of \$1000 per fiscal year.
 - 10% contribution is not required. Books, tapes and other materials are not covered.
 - You must apply **BEFORE** the term/courses begin.
 - Tuition reimbursement will take place after completion of the course and a copy of the passing grade is submitted to Amber Vore.

The [MESA/Confidential Professional Development Application](#) must be **complete**, with any additional pertinent information attached. Consideration of the request may be delayed if the application is incomplete.

Applications and amendments to applications will only be considered if submitted prior to the start of the activity. If the activity occurs prior to the committee's review, and the request is denied, the employee/department will be responsible for all expenses.

The deadline for applications is the first working day of the month. The Committee will normally meet within the first 10 working days of the month, and applicants will be notified of their decision shortly thereafter. Applications submitted after the first working day of the month, but prior to the start of the activity, will be reviewed at the committee's next scheduled meeting.

The committee has established the following guidelines for funding applications:

- The MESA Staff Development fund exists to help LBCC management, exempt and confidential employees attend workshops, seminars, conferences, and classes which enhance their ability to perform their job or promote career growth. (A maximum of 80% of the cost of an activity will be funded.)
- The committee does **not** fund thesis credits or research work for a Ph.D., professional membership dues, books, tapes, or other materials.
- To the extent possible, applicants are asked to make use of department/division funds for transportation costs. Applicants are encouraged to explore a variety of options when planning travel, including train, personal vehicle, rental car, etc. If purchasing a rental vehicle, Loss of Revenue Insurance **MUST** be purchased.
- A maximum of \$600 per person will be awarded each year.
- Applications will be considered on a first come, first serve basis but priority will be given to applicants who have not previously submitted an application for the current fiscal year.
- Unexpended funds will be carried forward.

These procedures for reimbursement will be followed:

- LBCC's travel and transportation policies and procedures will be applied. A current **Driver Status Report** form must be on file prior to reimbursement for use of an automobile, either private or rental.
- Tuition will be reimbursed after coursework is completed and a copy of a passing grade is submitted. Note: Graduate-level tuition reimbursement is taxable income, and you should anticipate a deduction from your paycheck for income tax, social security tax, and PERS contributions. If you would like more information on your tax liability, or to make special withholding arrangements, please contact Human Resources.
- Cash advances and personal reimbursements will **not** be made prior to completion of the activity. Advance payments can be made by LBCC directly to a vendor for expenses such as registration, travel tickets, and lodging. Contact Amber Vore at (541) 917-4211 or email vorea@linnbenton.edu for assistance.
- Once the activity has been completed, please complete the following:
 1. If the event has been paid for with college department funds, submit receipts and a Journal Entry Request form (showing the department account to be reimbursed.)
 2. If the event has been paid for with personal funds, submit receipts and a Travel Voucher for the appropriate year for reimbursement.

In order to receive reimbursement, all vouchers and receipts must be submitted to Amber Vore within 6 weeks following your activity, or by June 30 (whichever comes first). Failure to comply with the policy will result in your designated funds being returned to the MESA Professional Development fund for reallocation.

Recruitment and Hiring – Why They Are So Important

It is LBCC's collective mission "to engage in an education that enables all of us to participate in, contribute to, and benefit from the cultural richness and economic vitality of our communities." To live up to this lofty mission, our greatest resource ... our people ... must be intentionally chosen and employed with our mission and our future squarely in mind. Recruitment and hiring of new staff and faculty provides an immediate, tangible opportunity to align candidates' personal skill sets with the college's mission, values, and strategic goals. With each of these standards in mind, thoughtful evaluation of needs and planning combined with sound recruitment and hiring processes will help us to consistently on-board the best possible hires. Providing this thoughtful guidance is the intent and purpose of this hiring guide.

Equal Opportunity, Affirmative Action, Diversity and Inclusion

Meeting the needs of our students, we must assure them opportunity to engage with and benefit from the full breadth of a qualified, dynamic, and talented workforce. Aligning our recruitment practices with our mission, values and goals, LBCC is committed to creating and maintaining a learning environment that is culturally rich, inclusive and free of discrimination. Before planning a recruitment, every manager must consider these concepts and their importance within our hiring processes. "Equal employment opportunity" means that all individuals must be treated equally in all employment decisions, including hiring, and evaluated on their ability to perform the duties of the position without regard to race, color, religion, sex, national origin, age, exceptional abilities, veteran status, sexual orientation or gender identity. Our communities reflect many dimensions of diversity and are clearly growing in terms of racial and ethnic difference. When we recruit to hire new faculty and staff members, or seek to promote current employees, affirmative action requires us to engage in additional, organized, and intentional efforts intended to increase opportunity individuals of underrepresented groups. This may include expanded efforts toward outreach and retention of veterans, disabled veterans, and people of color. However, if we truly listen to the voices and concerns of our changing communities, there is much more work to do. We must rise to a greater challenge.

Diversity and inclusion are much broader concepts that welcome, value, and engage people from all backgrounds, experiences and perspectives. Equal employment opportunity and deliberate hiring for all dimensions of diversity are not separate actions, nor are they loosely connected to our recruitment and selection processes. They are central elements, purposely woven into the structure of our recruitment and hiring processes, so that we may achieve [LBCC's Mission, Value and Strategic Goals](#).

Ensuring our Future

To ensure our best future, all recruitment for classified, faculty, confidential, and management positions at LBCC must be met with intentional focus toward reaching out to attract and include not only the most qualified, but also the most diverse candidates. Our hiring practices not only determine whether we successfully recruit the best talent but also signal whether our commitment to equity, diversity, and inclusion is alive and well. These commitments are not in

tension with merit. To the contrary, they are essential to achieving our goals and fulfilling our mission to engage in an education that contributes to the cultural richness and economic vitality of our communities.

Although hiring practices may vary across LBCC's departments, programs, and disciplines, most searches follow a similar course, beginning with the occurrence of a vacancy, through creation of the search committee, screening, interviewing, and ultimately hiring a candidate. With that course in mind, this guide is designed to outline and track key stages in our hiring process. Specifically, the guide is organized into five sections, which necessarily occur in sequence, but due to time constraints and institutional needs may shift to support the progression of each unique hiring scenario. Following these steps, we believe, enables us to hire the best talent while continually enhancing and developing a culturally rich and diverse workforce.

Contractual Consideration

Various aspects of our hiring processes may be influenced or governed by our negotiated collective bargaining agreements (CBAs). Human Resources must confirm whether a CBA's obligation may impact upon hiring decisions prior to the initiation of a recruitment for positions within those bargaining units. This occurs when there are former faculty or classified employees who are currently eligible for recall or preferred hiring. In those instances, HR must first determine whether an offer of employment, pursuant to the provisions of their prospective CBA, is appropriate before any recruitment, transfer, or promotion activity takes place.

Please contact the Employment Services Manager before beginning your recruitment planning to confirm whether your vacancy is subject to faculty recall or classified preferred hiring.

Stage 1- First Steps

When a Vacancy Occurs...

When a vacancy occurs, whether due to an existing staff departure or due to the addition of a new position, hiring supervisors should begin as soon as possible to develop and plan their recruitment and search plan. In nearly all circumstances, contracted (benefit-eligible) positions are subject to a full, open-to-the-public search. If special requirements of grants or outside contracts are relevant, please consult the Employment Services Manager to discuss options or appropriate measures to fulfill unique recruitment needs.

Organize the Recruitment Plan and Secure Budget Approval

Prior to any recruitment to fill a contracted position, hiring supervisors must secure budget approval. To get this approval, hiring managers must work with their vice president to evaluate the position's contributions to the department and articulate the role it serves toward supporting and fulfilling the college's mission, values and strategic goals. The Vice Presidents of Student Services, Academic Affairs, and Business and Financial Operations, along with other college

leadership, will collaborate to reach a decision whether to approve funding to fill a new position or refill a vacancy of an existing contracted position.

Select the Search Team

Department chairs, hiring supervisors, or their proxies must make an effort to mindfully select a search team that is comprised of a diverse cross section of individuals, which may include members from faculty, classified or management staff, as well as external parties or stake holders. Members should be familiar with the position and its role and contributions to the college. However, it is not required that all members be subject matter experts in the full content of the job.

To avoid inadvertent systemic bias, search teams must be comprised of members from the home department (up to a maximum of 50% search team composition), and individuals from outside areas (the remainder of the team).

Ideally, search team members should have a solid understanding of and commitment to the college's mission, values and institutional goals. As such, search teams should include members who are aware of and will monitor recruitment efforts for compliance with legal requirements as well as LBCC's commitment to nondiscrimination. All members of any search team are responsible for ensuring that equity, diversity and inclusiveness are ever-present values.

Members of the search team should be well informed in elements of structural and implicit bias, and understand methods to recognize, discuss and eliminate the influence of those biases in applicant screening and hiring decisions.

In addition, we recommend all search teams include at least one member who is specifically trained and prepared to serve as a Diversity Advocate during the search. Such training may be obtained through a variety of resources. A Diversity Advocate must have demonstrated ability to both recognize elements of bias and the courage to address and discuss it openly, without blame, with other search team members during the applicant screening and interview processes. At a minimum, it is mandatory that all search team members complete an Implicit Bias Training presentation provided through Human Resources in order to serve as a search team member.

Search committee members should revolve. If the exact same team always scouts for talent, do not be surprised if you get the exact same kind of candidates invited back, time after time. The required expertise, seniority, and availability of staff to serve can surely limit your options. Nevertheless, be mindful to avoid falling into a pattern that assumes that certain faculty or staff members must (or must not) serve on a search committee. Special efforts should be taken to ensure that minorities and people of color have opportunity to serve on search teams. However, it is important to note that individuals from marginalized groups and people of color are frequently asked to serve on more than their share of hiring committees. Be mindful of their time, and do not rely on them to be the primary representative for their race, ethnicity or gender. Members of the search team must be able to commit the time required to participate in the entire recruitment process, beginning from development of the position and hiring criteria through all interviews and deliberations, concluding with the choice of the top candidate. Recruitments, when done well, can be time and energy consuming. Before selecting your

search team members, carefully consider whether the individual will be able to meet the following requirements:

Commitment

The ability to set aside the time needed to prepare for and attend each meeting, arrive on time and fully participate in all discussions, interviews, and forums. Bear in mind that some members may need approval from their supervisors. Be sensitive to the needs of the department and consult with the affected supervisor prior to asking the member to serve.

Communication

The ability to listen actively and seek to understand the opinions and perspectives of others. Speak up and be brave enough to share their own opinions, especially when they differ from others. Discuss disagreements respectfully and accept the search team's collective decisions. Remain engaged in constructive dialogue and not withdraw when opinions are not in concert with their own.

Subject Matter Expertise

Content or "subject matter" experts are valuable resources for evaluation of an applicant's education and skill sets in specific areas. Additionally, they can provide important insights to faculty positions affecting course planning, student engagement, and to the technical aspects of any position. Be mindful of how you determine who has expertise and credibility regarding the position you're recruiting, and why. All that we know about implicit biases, stereotyping, and in-group favoritism, applies here as well.

Recognize Bias

Accepting of the preface that everyone has the potential for unconscious and unintentional bias. The ability to commit to working together to recognize and counteract all forms of bias and challenge unnecessary barriers to equal opportunity in our employment practices wherever they become apparent.

Foster Diversity

Be receptive and discuss how all dimensions of diversity are relevant and essential functions of the specific job. Ensure the aspects of diversity and inclusion are elements included in job descriptions, interview questions and all hiring criteria.

Confidentiality

Abide by LBCC's confidentiality agreement for search team members. Keep all information regarding applicants, as well as discussions of the search team, candidate rankings, etc., in strict confidence.

Create or Revise the Position Description

Position descriptions are at the core of a successful recruitment. The most effective search and screening teams participate in the review and refinement of the position description and

development of screening criteria prior to opening a recruitment. To prepare, hiring supervisors should obtain the most current version of the position description from Human Resources early in the planning stages of all recruitments.

Close, careful review of the scope and purpose of the job, who it serves and what contributions it makes is required to ensure the duties of the position are current and relevant to the department, program, discipline, as well as the institution as a whole. Frequently, position descriptions need to be updated to support new initiatives, redistribution of duties, or department and institutional goals. Documenting, evaluating, and enacting those changes is a critical step that must be completed prior to any recruitment.

Ideally, search team members should have the opportunity to review the position description together, prior to posting, and review it not only for content, but also for speech that could be problematic for marginalized or minority groups. Hiring managers should lean on diversity advocates or human resources staff to review for such potentially problematic language in position descriptions.

Classification, Compensation and Position Control

Prior to developing or revising a job description, each hiring manager should examine and consider carefully the many elements involved. Many aspects of established staff positions are predetermined and not subject to change without the appropriate review and authority. Often a hiring supervisor may consider changing specific elements of a position, such as the title, qualifications or required experience, possibly some of the essential duties. Human Resources will work with hiring supervisors and search teams to review all requests for changes, evaluate the appropriateness of all revisions, and ensure the elements of all position descriptions are in alignment with established internal position control standards.

Summary or Purpose Statement

Regardless of the classification of the job, all position descriptions should be approached as an informative document and marketing opportunity highlighting LBCC's commitment to our mission, values, and strategic goals. It should focus on aspects of the job that will appeal to people of identity groups that have been underrepresented in the past, as well as those from the dominant culture. It should be developed in a manner that clearly confirms our intentional efforts to build and sustain a diverse and inclusive work force and contribute to the educational enrichment of our increasingly diverse student population and community.

It should attract the best-qualified candidates, and at the same time, avoid narrowing the applicant pool by prioritization or weighting selection criteria that may unintentionally create barriers to marginalized groups. It should clearly state the minimum qualifications, education and skills attainment, that assure academic credibility yet wherever appropriate, also allow opportunity for equivalent measures that recognize and award value to training, research, and other relevant skills and experiences obtained by non-traditional means.

Qualifications for Faculty Positions

Subject to the classification of the position, some hiring criteria or qualifications are very prescriptive and must be clearly defined. Such is the case with faculty positions teaching transfer courses. In those recruitments, position descriptions may contain very stringent qualifications intended to assure applicants have achieved the requisite education and acquired experience that will meet the college's accreditation standards. Hiring supervisors, working with Academic Affairs and Human Resources, must verify that minimum qualifications for all faculty

positions are confirmed prior to beginning any recruitment. In general, to be qualified for a teaching position at LBCC, the following is required.

Transfer Degree Programs

Master's degree in the subject area to be taught, and/or twenty-seven graduate quarter hours in the primary subject area, or twenty-four graduate quarter hours in the secondary subject area.

Career Technical Education

A degree (Associate Degree is acceptable within applicable subject area) and a minimum of four years' successful work experience within appropriate occupational area. Or...

Experience: Seven years' experience in an appropriate occupational area may be used as the standard of approval for CTE faculty.

Non-credit Courses

Expertise in the subject matter to be taught is required.

Qualifications for Non-Teaching Positions

Qualifications for all other jobs at LBCC must be written with consideration of our strategic goals of equity and inclusion to intentionally seek out qualified job seekers from all races, ethnicities, cultures and perspectives. Our minimum qualifications should be written to attract and assure that opportunity for consideration of all job seekers, from all walks of life is a mainstay of our hiring philosophy.

As a rule, to attract a robust and diverse applicant pool, hiring managers must consistently state only the minimum required qualifications, given the position's actual requirements, and make every effort to offer alternative means of meeting those qualifications, beyond the defaults of education and direct experience in the position. Alternative means may include evidence of experience gained through employment or volunteer work, education gained by specialized course work, or a combination of training and experience relevant to the essential duties and required outcomes of the position.

Minimum requirements should support the accomplishment of the essential functions of the job, but should not unjustly bar applicants with qualifications obtained by non-traditional means. Minimum qualifications should establish only what is required to perform the job within required legal perimeters (licensing or certificates for non-teaching roles). Requiring qualifications, over and above what is minimally required to teach or to ensure a quality skill level narrows your applicant pool and creates disparate impact on diverse and minority job seekers within our communities. With that in mind, whenever possible, hiring supervisors should explore means of opening the minimum qualifications to allow for the most diverse applicant pool.

Avoid the risk of unintentional bias from...

- Writing the position description in a bland or too formal way that ignores the context of the job, opportunities, challenges, and future initiatives
- Establishing minimum qualifications that are unnecessarily rigid and exclusive, potentially creating disparate impact to minorities, people of color, and other underrepresented groups
- Basing preferred qualifications on unexamined assumptions about merit and excellence
- Holding a narrow view of the position based on past expectations or incumbents
- Thinking and writing from the privileged or dominant perspective only

- Focusing too closely on tasks and qualifications, expecting the qualifications to screen the pool rather than the search team

Prior to posting a position for recruitment, Human Resources will assure position descriptions are written to include equivalent means of meeting minimum qualifications, alternative to formal education, which allow all applicants who are minimally qualified the opportunity to be considered for employment. This effectively means that most applicant pools will be of larger size and require more time to review, assess and select candidates to interview. However, this method will help to assure the hiring supervisor and search team have the most diverse group of qualified candidates from which to choose. Knowing this, hiring supervisors and search teams must allow sufficient time in which to review and score a potentially large pool of applicants.

Essential Duties and Responsibilities

Essential job functions describe the specific duties and responsibilities of any position and determine the classification and compensation of the job. A job function is considered essential when the performance of the function directly supports the purpose of the position. Typically, an essential function occupies a significant amount of the employee's time and may require specialized skills to perform. By accurately describing the essential functions of the job, job seekers will have a clear understanding of the role, contributions, and expectations of the person performing them.

When developing or revising essential duties of a position for recruitment, supervisors should carefully consider the validity of each duty and its relevance to the position. Has the position changed? Does the task require the same level of education and experience that is noted in the minimum qualifications? Does the language describe the duties and responsibilities accurately in a manner that is easily understood?

When revising essential duties of any position, hiring supervisors must be aware of the potential to alter the classification or position type, and/or the positions' salary grade. Bear in mind that while most faculty positions are compensated based upon their credit load per term, LBCC's management/exempt, confidential and classified position types are compensated based upon specific skill sets and level of accountability within the institution. Consulting with Human Resources early is important to discuss the purpose and intention of changes and how they may affect the classification and compensation of the job. When developing essential functions for the position the following should be noted:

Critical Functions

Duties of the position should be described in a straight-forward, not unnecessarily embellished manner. They should be arranged by importance to their academic or institutional purpose and impact.

Authority Level

Duties should reflect the authority for the role, whether the position has supervisory functions, or other leadership responsibilities. Definitive language should be described to attract the appropriate level of qualified candidates.

Complexity Level

Specific technical, professional, or academic content information for the role must be described to accurately define the positions classification, evaluate and factor the compensation level.

All Essential Duties

Must be directly related to the purpose of the job, and should be inter-related to the accomplishments of the department, and the mission and strategic goals of the institution.

Articulate the Screening/Hiring Criteria

Development of relevant search criteria is a critical component of all recruitments. Screening criteria must always be in place prior to the first screening of applicants. Hiring supervisors and search teams should work together to develop screening and hiring criteria that support the mission and values of the institution but are also in direct alignment with the purpose and essential duties of the position.

Early in the search, hiring supervisors and search team members should begin discussing what it means for a candidate to be a good fit for both the college and the position. There are various methods of measuring a candidate's fitness. The bulk of research indicates that without a pre-commitment to a process that identifies and assigns value to certain attributes, we often simply pick the candidate that we "like" best, and then rationalize the prioritization or weighting of selection criteria after the fact. That said, we are not suggesting that hiring authorities and search teams follow a robot-like process, but rather, use their discretion to thoughtfully and transparently develop meaningful criteria that are relevant to the position. We emphasize the value in utilizing the approved position description to identify and prioritize the criteria that matters and helps to gauge a candidate's potential for success in that role.

In the event a position vacancy occurs, and the position description is already developed and approved, development of hiring criteria or screening matrices is of critical importance to hiring supervisors and search teams. Before screening applicants, search team members must have a shared understanding of the qualifications and nuance of each position. It is vital to understand each criterion developed to fairly and knowledgeably assess prospective applicants.

Hiring and/or screening criteria should:

- First and foremost, be directly related to the essential duties of the position.
- Answer the question, "If we are making this a screening criteria, why is it key to success, and why would a person without this knowledge/skill/ability struggle or fail in the job?"
- Indicate if alternate means can meet qualifications, and if so, the evidence, experience or other competencies that will fulfill the requirement.
- Discuss how potentially exceeding qualifications can affect the evaluation of the candidate and how we assess them against others, i.e. are they over-qualified, and if so, does it matter?
- Identify each essential duty and why it is needed. Describe how a candidate can demonstrate their skill or experience in each area.
- Explore alternate means that an applicant can meet each criterion. Look for legitimate and equitable methods to screen in rather than screen out qualified applicants.
- Factor in diversity considerations and affirm they will not distract from the goal of finding an exceptional candidate.
- Identify minority and underrepresented applicants as clear and relevant individuals who will help support the colleges' mission and contribute to our strategic goals of equity and inclusion.
- Avoid job criteria that may unduly narrow the applicant pool, thereby limiting the diversity of potential candidates. Examine and eliminate criteria that may lead a search team to

dismiss otherwise talented and competitive candidates. For each job criterion, discuss what effect it may have on the applicant pool, and whether that effect is justified.

- Look for what is missing. Is the position description and/or hiring criteria missing skill sets or critical attributes that sustain the purpose of the job, initiatives of the department, or strategic goals of the college?
- Examine and assure the hiring criteria is free from unconscious or structural bias that influence our decision.
- Identify the process in which the search team will proactively question and/or confront implicit bias and/or structural bias and eliminate it prior to making any hiring decision. Where such bias exists and cannot be eliminated, discuss thoroughly and document the reasons why.
- Include means of adding merit for special applicants with affirmative action entitlements, such as veterans and disabled veterans.

Utilizing the essential duties on the position description as the screening/hiring criteria, the hiring supervisor must develop a screening matrix, which will be utilized uniformly by the search team for screening everyone within the applicant pool. The matrix must provide opportunity for team members to share quantitative rating and/or qualitative feedback on each criterion, and should endeavor to include criterion relevant to the mission, values and strategic goals of the college.

Avoid unintentional bias risks that may come from...

- Inconsistent weighting or failure to agree on importance of criteria
- Poorly defined or undefined expectations
- Narrow or rigid view of how qualifications can be met
- Overly restrictive views of scholarly merit
- Unsubstantiated favoritism toward prestigious institutional credentials
- Reviewing and screening of applicants before hiring criteria is established

A plethora of matrix and rubric styles and formats are available for developing your hiring criteria. Human Resources can provide sample matrices that have been successfully used in prior recruitments, and/or assist the hiring supervisor to develop their own matrix if needed. All hiring criteria must be reviewed and approved by Human Resources prior to use for applicant screening activity. All hiring criteria, notes, and comments used for screening applicants must be kept confidential, retained and submitted to HR at the close of the recruitment.

Advertisement and Marketing The Position

LBCC is an Equal Opportunity employer with a strong institutional commitment to the achievement of equity, inclusiveness and excellence among its faculty and staff. The energy, creativity and resources we devote to developing our search teams, perfecting our position descriptions and hiring criteria, can only take us as far as we are willing to reach out. Though we may believe there is a sufficient pipeline of qualified applicants just “out there” waiting at our door. Such an approach may passively lead to a failure to reach a more robust and diverse pool of applicants.

The range of candidates who apply for a given position may often be a function of the job criteria, specific content, and placement of advertising and marketing. In support of LBCC's mission, values and goals, advertisements for recruitments should clearly state the colleges, and each department's commitment to an equitable and inclusive recruitment and hiring

process. Marketing and advertising should be inviting and intentionally directed to employment listservs, websites, publications, organizations and job boards that reach out to minorities and people of color as well as the dominant culture.

Human Resources utilizes national recruitment sites such as [Latinos in Higher Ed](#), [Chronicle of Higher Ed](#), [Indeed.com](#), and others upon request. Many other online recruitment resources sweep these sites regularly, posting our jobs on their websites at no additional cost. The college's employment opportunities are advertised in local and statewide newspapers each week, and listed through the [Oregon Employment Department](#) database. Every effort should be made to build a robust pool of qualified and diverse applicants by advertising widely before filling a position. Hiring supervisors and search teams can expand the reach of advertising by:

- Networking with faculty or peers from other educational institutions and businesses
- Reaching out to relevant professional organizations, agencies, and focus groups
- Sharing information about the college, its mission, value and strategic goals with family, friends and neighbors
- Sharing the position posting on social media sites
- Utilizing LBCC's media and marketing department for distribution materials
- Attending job fairs, career fairs, and other campus or community events

Human Resources will assist to facilitate additional advertising for recruitments as needed. Typically, additional advertising and marketing costs are paid from the budget of the applicable department. Contact the Employment Services Manager for additional information if needed.

Avoid bias risks that may come from...

- Relying primarily on the posting and standard local advertising to market the recruitment
- Using only personal informal networking that may be influenced by unconscious bias
- Passive or insufficient outreach to targeted diverse populations
- Holding false assumptions that minorities and people of color won't want to move to the area
- Assuming the college salaries aren't competitive in the workplace
- Failing to invest in sufficient posting time, marketing and outreach efforts

Strategic Outreach to Specific Identity Groups

To support the college's strategic goal of equity, and our values of inclusiveness, excellence, and learning, it is imperative that we intentionally recruit a workforce that is representative of our increasingly diverse student base. To this end, the Human Resources department employs a full-time Employment Outreach and Retention Specialist whose role is to work closely with diverse community organizations and populations to aid the recruitment and retention of a representative workforce. Managers must be cognizant of the demographic mix of their direct reports and seek to intentionally recruit underrepresented populations. Please contact Human Resources for assistance in reaching underrepresented applicants. The Employment Outreach and Retention specialist is available to work with your search teams on items such as:

- Providing training on implicit bias in hiring
- Creating advertising and outreach plans
- Tailoring on-boarding processes for diverse employees
- Working to install and grow employee retention programs with a focus on underrepresented populations

Please do not hesitate to call and utilize these important services in support of our college wide values.

Submit Search Team Membership, Position Description, and Screening Criteria for Review and Approval

As mentioned earlier in this guide, the recommendations listed above may require significant, advance preparation time. Human Resources is committed to assisting hiring supervisor's and search teams to meet these expectations wherever possible. Early planning is imperative.

Please contact the Employment Services Manager for questions or assistance as soon as you become aware that a vacancy has occurred, and/or a recruitment may be pending.

Stop and Check In with HR: Confirm the search team, job description, and hiring criteria are approved before the position is posted and advertised.

Stage 2- Posting and Screening

Posting the Job in the ATS

Once you have developed your search team and have received approval by Human Resources on team membership, the position description and the screening/hiring criteria, you may instruct your administrative support staff to draft a posting in the college's online [Applicant Tracking System](#). Human Resources will assist hiring supervisors who do not have sufficient administrative support to initiate and post positions whenever needed. Please utilize the Contracted Recruitment and Search Checklist to verify that you have all the information you need to complete the posting draft.

LBCC utilizes the online applicant tracking system, known as People Admin, to post, recruit and fill all contracted, as well as part-time, non-contracted positions for all LBCC locations. The applicant tracking system (ATS), is a relational database system which allows multiple designees to initiate postings for vacancies, access and screen qualified applicants, and facilitate hiring decisions within their area.

The ATS uses a hierarchical progression of key users that may begin with administrative support staff, who input the actual job information into the system, progressing to the hiring supervisor who reviews the posting and then forwards it to their Vice President for final approval. Human Resources monitors each step, assists departments through the process, and confirms all relevant position control data is complete. Once all the steps are complete, the position will then appear, published live, on the college's Employment Opportunities webpage, and is open to receive applications from job seekers within our communities and across the nation.

Initiating a Draft Posting

Whether it's the hiring supervisor, administrative support staff, or Human Resources that initiates the draft posting in the ATS, the position description and other vital information (including any special applicant instructions), must be input and approved by HR before the posting is initiated. In addition to the pre-approved position description and search criteria, all position types will require the following position control data and recruitment planning information in place in order to initiate your posting.

ATS User Competence

Guest user access and training for the hiring supervisor, administrative staff and search teams

FOAPAL

Fund, Organization, Account, Program, etc. (budget and payroll identifiers) must be confirmed

Posting Period

Length of time the posting is open to receive applications, may vary significantly based upon the classification of the job

Search Team

Names, email addresses or other contact information for all search team members

Placement Goals

Projected hire and start dates, allow time for salary placement, offer letters and notice to prior employers if applicable

Ancillary Requirements

Supplemental questions, philosophy of teaching statements, samples of relevant work, or additional tests required from applicants if pre-approved and applicable

Stop and Check: Confirm the job description, search team, and hiring criteria are approved by HR before requesting posting in the ATS.

Preliminary Screening of Applicants

Now that your vacant position is posted in the Applicant Tracking System (ATS), Human Resources will monitor and review each application that is complete and has identified as legally authorized to work in the United States.

Preliminary evaluations conducted by HR are for the purpose of confirming that individuals who have submitted applications have fully completed all required elements as listed in the job posting. If an applicant has not submitted complete information, Human Resources will respond through email to notify the applicant of the status of their application. When an application is complete, HR will evaluate the application to determine whether the applicant has listed knowledge, skills and experience sufficient to meet or exceed the minimum qualifications for the position. In addition, HR will verify that all other requirements, such as special licenses, certifications, supplemental documentation or tests, are included with the application. HR will confirm all required documents are uploaded and acceptable according to the stated criteria in the position posting and/or special notes to the applicant and will review all academic transcripts required for faculty positions. When questions arise regarding an applicant's academic credentials, HR will consult with Academic Affairs to examine and confirm whether those credentials meet the requirements to obtain Teaching Approval for the specific course or discipline.

All minimally qualified applicants will be forwarded to the search team for review and secondary screening based on the pre-established screening/hiring criteria that was discussed on page 13 of this guide.

Identifying and Evaluating Special Applicants

Veterans and Disabled Veterans

Per statute, applicants who provide proof of their veteran status by attaching a qualifying DD-214 form to their application are entitled to extra merit or 'preference points' that must be added during each stage of the recruitment process. Human Resources will identify these applicants and notify the hiring supervisor when there are veteran applicants within the pool who are subject to affirmative actions.

LBCC Contracted Classified Staff

Qualified applicants who are currently employed by LBCC in a contracted Classified position, are entitled under their collective bargaining agreement under Article 14 C, 3 in the Classified Agreement, to an "in person" interview for open Classified positions. Human Resources will notify the hiring supervisor whenever this occurs.

Adults with Disabilities

When an otherwise qualified applicant requests assistance in the recruitment/hiring process due to a disability or a perceived disability, Human Resources will work with the applicant and the hiring manager to provide reasonable accommodations. Employers are responsible to provide such accommodations throughout the interview and selection process. If a candidate notifies a hiring manager directly of a need for accommodations in the hiring process, the manager should immediately contact HR for assistance in providing the accommodation.

Releasing applicants for Secondary Screening

When an active posting closes, Human Resources will complete the preliminary screening of all applicants. Depending on the position and the size of the applicant pool, this process may take some additional time to complete. Once all candidates' qualifications have been determined to meet the required minimum qualifications for the position, Human Resources will update the status of each applicant and move their application into the qualified pool, where the hiring manager may access them. At this time, HR will send the hiring supervisor an email report indicating the size of the applicant pool, and a brief summary of the diversity of applicants. The report will also identify how many applicants have special entitlements or affirmative actions that are required. From here, the search team can utilize their established screening/hiring criteria to engage in secondary screening to choose a "short list" of final candidates. If the applicant pool seems limited or unrepresentative, the hiring supervisor and/or HR may consider reposting the position and/or taking other additional steps that may yield a broader pool.

Constructing the Short List

At the hiring supervisor's discretion, Human Resources will contact the search team and provide them with a Guest User ID and login instructions to access qualified applicants in the ATS. By this time, the search team must use their uniform set of screening/hiring criteria to evaluate the applicant pool. Prior to screening, it is key that the group review and recommit to those criteria, and remind each other to hold one another accountable to the criteria that matter. Every member of the search committee should be familiar with the relevant criteria before review and ranking applicants begins.

The search committee will have to review the application for each candidate, looking at CVs and resumes to research statements, scholarship, and project portfolios. At the discretion of the

search team, there may be one or multiple stages of review. While the search team is free to design a screening process to suit the unique nature of the position, the end product must be a documented equitable rationale for choosing the shortlist of candidates that will be invited to campus and interviewed.

The timing in which the hiring supervisor releases the applications to the search team may vary based upon time constraints and many other factors. Careful planning is required so that search teams have ample time to apply a thorough and consistent screening process. Screening applicants for large pools may take days or even weeks. Intentionally budget enough time to discuss the candidates as needed and commit to stopping or taking a break if the search team hits fatigue. If screening occurs in separate locations, plan how the team will meet to discuss their findings and evaluations and be sure that all members get the chance to ask questions and get them answered before landing on final candidates.

To assure the most consistent and equitable screening process search teams should:

- Utilize the pre-established search and screening criteria, understand how each criterion relates to the essential duties of the position
- Use a screening matrix or rubric to assess merit, capture notes and expand on questions where needed
- Look for transferrable skills and ways to broaden academic or scholarly merit wherever possible.
- Expand the criteria where possible, use a broader perspective to assess qualifications and how they can be met
- Be flexible and include diverse perspectives at every stage of the screening, focus on principles of equity, rather than simply equal consideration
- Pay attention and listen open-mindedly to everyone's perspective, especially to those that differ from your own
- Revisit underrepresented minority candidates in the pool to see if evaluation bias played a part in their exclusion from the shortlist

The screening process can be exhausting, even when you are evaluating only a few applicants. Stress and fatigue can significantly affect judgment and cognitive reasoning, which may cause the team to break in favor of the familiar, our own in-groups, and sabotage all efforts toward our strategic goals. Plan and allow enough time for search team members to discuss the applicants thoroughly, especially to reconcile disagreements when they occur. When questions arise that warrant group discussion, remember to utilize the job criteria you collectively agreed-upon and articulated before the applications came in. Renew the team's commitment to the mission and goals of the college and each other. In particular, every member of the search team should be reminded that the hiring criteria includes recognition and merit for applicants with contributions to equity, diversity, and inclusion.

Avoid implicit bias risks that may come from...

- Poorly developed, unclear or too rigid hiring criteria
- Too early access and review of applicants, allowing unconscious, biased assessment without regard to consistent, agreed upon hiring criteria
- Conflicts of interest by search team members with unexamined personal or professional relationships with applicants
- Unexamined assumptions of merit based on unstated criteria or elite academic credentials
- Inconsistent weighting by search team members, failing to discuss different perspectives
- Evaluation based on "sameness" or perceived "fit", failing to examine unconscious bias

- Failing to keep the college's value of equity and inclusion in the forefront of the hiring criteria, ignoring the tendency to favor those who are similar or “just like us”

-

Approval of the Short List

After all applications have been reviewed and a short list has been established, it is required that the hiring supervisor must consult with their Dean, Director or Vice President to review the applicant ranking and short list. If the applicant pool seems oddly limited or unrepresentative, the hiring supervisor and their leadership may consider whether taking additional steps to broaden the applicant pool is warranted. If not, leadership may approve the shortlist so that the hiring supervisor and search team may begin interviewing their top candidates in any capacity, which may include Skype or Zoom online interviews, phone or conference call interviews, or other “first round” screening-level interviews.

Stop and Check in with HR: Submit the rationale for finalists chosen to HR before candidates are invited to campus.

Stage 3 - Interviews and Selecting Our Candidate

Interview Strategies

Subject to the position type and the recruitment design, hiring supervisors may choose to develop their interview strategies utilizing one or a variety of different interview styles. Hiring supervisors should work with their search team to plan an interview schedule, questions, and campus visit that ensures an equitable experience for all candidates and provides opportunity for discovery for both the search team and the candidate. In considering the following types of interviews, the search team should seek to mitigate unconscious bias by planning interview questions and an agenda that is drawn directly from the established hiring criteria for the position, the mission, strategic goals and values of the college. Following are a few options to consider when designing your interview experience, and some of the opportunities and risks associated with each:

Unstructured Interviews

Questions asked and topics covered vary considerably from interview to interview, and candidate to candidate. Interviews tend to be more like conversations that meander and are more of a getting to know you journey, rather than matching a candidate's skills against a pre-established set of job criteria.

Opportunities

- Allows the search team to ask questions based on the individual applicant's perceived strengths and weaknesses rather than a rigid series of pre-determined queries
- Can disarm the tension frequently associated with interviews and provide a clearer picture of the candidates affect and personality

Risks

- Can lead to wholly dissimilar experiences for candidates, making equitable comparison and defensible choices a challenge
- Interviewers assess candidates based upon their own personal instincts, rather than objective job/college related criteria
- Can unduly favor candidates with verbal communication skills that may be unrelated to the needs of the position (cult of personality)

- Allowing a false sense of their own interviewing skills to prevent the search team from examining unconscious or implicit bias

Structured Interviews

Agenda and topics covered are pre-planned by analyzing the job in advance and establishing relevant hiring criteria. Questions are formulated that relate directly to the specific duties and demands of the position. Typically, rating scales or point factors are used to evaluate responses against established job criteria. Research favors the use of structure to increase the predictive validity of the interview as a valid selection tool.

Opportunities

- Ensures a relatively equitable experience for all candidates
- Makes documentation of choices more equitable and straight forward and documentation of rationale for choices more easily defensible

Risks

- May also inhibit or intimidate candidates and provide a less engaging, interactive and revealing conversation
- Rating scales or strict point factor systems can have the effect of influencing the search team's objectivity during deliberations if members are influenced by other's opinions
- Unconscious bias and desire to be agreeable with peers may cause search members to rate too high or too low based on non-job related factors

Behavior Based Interviews

A technique that involves asking all candidates the same, standardized questions about how they handled past situations that were similar to situations they may encounter on the job. The interviewer may also ask discretionary questions, probing for details of the situations. Relevant follow-up discussion can help clarify the candidate's behavior in the situation and outcome. Responses are typically scored with behaviorally anchored rating scales relevant to established hiring criteria. Research generally supports this method over others because of the belief that past behavior is an indicator of future behavior.

Opportunities

- Can lead to rich insights related to candidates actual on-the job behavior and actual experiences... or lack of them
- Can provide insight into how candidates dealt with actual successes and failures

Risks

- May be problematic in a fast-moving world where yesterday's approaches quickly become irrelevant
- May give undue advantage to candidates with richer experience as opposed to those with great aptitude who may lack experience, which can lead to disparate impact for diverse populations
- Answers are largely anecdotal, giving advantage to the best storyteller, rather than the best contributor

Recommended Best Practice

Considering interview strategies, many hiring supervisors choose a combination of both structured and behavior based interviews. In today's world, most evidence suggests the best interview results come from a structured approach that keeps questions focused on the essential duties of the job, the institutional mission and strategic goals. Questions can be behavioral based, but should also include situational or hypothetical questions which allow

candidates to demonstrate past experiences, and also project potential strategic or leadership qualities. Structured interviewing can produce more accurate hiring decisions, in part, because it limits the extent in which subjective or unconscious impressions of the candidates, which are prone to bias, may influence hiring outcomes.

Although the flow of conversation during the structured interview may seem rigid, due to posing the same set of questions in the same order to all candidates, this method does not rule out the use of follow up questions. Questions should be seen as a jumping off point for richer discussion and search team members should be encouraged to ask individualized follow-up questions while bearing in mind the need to design equitable experiences for all. Structured interview questions tied to the essential duties of the job can also help candidates obtain a more realistic view of the job, which can enhance the dialogue that should occur between the candidate and search team during interviews. Search team members should be prepared to probe for additional, job specific information that will provide deeper understanding of the candidate's qualifications and bring to light the comparisons between candidates.

Develop Interview Questions

One of the core components of the structured approach is designing effective interview questions and asking those questions to all candidates for a given position or role. While many hiring supervisors are already on board with this concept, there are still challenges to execute it in practice. Hiring supervisors, working with their search team, should begin work early in the recruitment to identify the key components of the position and develop interview questions that foster open discussion, while also being mindful to potential unconscious or implicit bias that can occur. All interview questions should:

- Be directly related to the role and hiring criteria of the position
- Be clearly defined and measurable, probing for the knowledge, skills and abilities needed to successfully carry out essential duties of the job
- Address basic workplace competencies such as workplace ethics, problem solving and interpersonal skills
- Include behavior based questions that focus on job-related experience, but also encourage the candidate to offer hypothetical responses when they lack direct experience in a particular area
- Include diversity related questions that represent real-world experiences and situations, and allow candidates to demonstrate their potential contribution to the college's commitment to equity and inclusion.
- Be open-ended to allow the candidate to elaborate on their experiences and ideas
- Be considerate of perceptions and potential bias that may occur toward candidates of color, minorities and other underrepresented groups
- Have alternative means to ask questions and engage with candidates whose first language is not English. Focus on equity, rather than an exact equal experience for each candidate.
- Have more than one appropriate answer or acceptable means of answering questions
- Be delivered consistently to all candidates, including those candidates who are internal or known to us. Note that candidates who are known to search team members may present many special challenges and should be disclosed and discussed with the hiring supervisor prior to interviews.

Avoid bias risks that may come from...

- Insufficient planning resulting in poorly developed questions. Questions that are unrelated to the purpose and essential duties of the job. No clear understanding of what appropriate responses for each question will look like.
- Posing all questions from the dominant culture perspective, failing to consider how questions are perceived by candidates from different cultures, perspectives and experiences
- Evaluating answers based on your first impressions of the candidate. Neglecting to anticipate and engage in follow-up questions from candidates who are initially less favorable
- Just 'going through the motions' when discussing diversity and values related questions. Relying solely on the Diversity Advocate rather than the entire search team to engage in diversity and values related discussions.
- Asking any illegal or inappropriate questions. You know what they are, and if not, click here for a list of what NOT to ask.
- Failing to examine our unconscious bias toward or against known candidates equally with external candidates.
- Neglecting to prepare for and discuss equitable versus equal evaluations for minorities, people of color, and people from underrepresented groups in the workforce.

Stop and Check in with HR: Confirm the interview questions and feedback matrix are approved before candidates are interviewed.

The Campus Visit

Based upon the position, elements of the recruitment process may differ widely, especially in the method and manner in which we conduct on-campus interviews. Naturally, a campus visit and interview process for an English faculty position will look different from a Heavy Equipment Diesel faculty? and rightly so. While there are many valid reasons and purposes for the difference in interview types, schedules and agenda's, one over-arching goal should remain the same. All candidates should leave LBCC feeling unequivocally welcomed and valued.

If a candidate leaves feeling less than appreciated, that impression will surely be shared with others, whether with friends, family or colleagues, or posted publically to job search websites such as Glassdoor, Indeed, and LinkedIn. A bad review or comment from an unhappy candidate will reach a global audience within minutes, potentially damaging our reputation as a quality employer and educator, and undermining our ability to recruit all other job seekers who learn of that negative experience. Consistent with the earlier steps in this guideline, hiring supervisors should purposely implement strategies to meet our candidates that center on [our mission, values and strategic goals](#).

As you prepare for the campus interviews and forums, keep in mind that a candidate's visit constitutes a two-way courtship. In today's technological world, most candidates will have researched our college and our communities. They are deciding whether LBCC's professional landscape will support their occupational needs and endeavors, as well as provide them with a fair and respectful environment in which they and their families can flourish. It is important to remember that while LBCC is both interviewing and evaluating the candidate, each candidate in turn is also evaluating LBCC. The campus visit and interview is our opportunity to show them, in very real terms, how we live up to the values we expound.

Scheduling Campus Interviews and Candidate Forums

As you develop the campus visit and interview schedule, consider our values of equity and inclusion as you plan and coordinate the schedule and agenda. Whenever possible, plan to:

- Confirm the schedule and agenda provides ample time for the candidate to arrive and find the campus location or conference room. Provide a welcome packet, including a campus map, or arrange to meet them at a central location if needed.
- If the candidate is from out of the area, offer information and assistance with area lodging and accommodations. For any potential reimbursement, please see the “Interview Expense Reimbursement Procedure” document.
- Confirm whether the candidate needs any special assistance. If food or drink is provided during interviews, confirm whether the candidate has any special considerations.
- Where appropriate, arrange meetings with key staff members who are not a part of the recruitment or search teams. If the Dean or Director is not the hiring supervisor, plan a brief meeting or drop in so the candidate can meet them.
- Offer a brief tour of campus, be mindful of the weather and make sure the candidate is dressed warmly in winter months.
- Allow appropriate breaks between meetings or long interviews. Let the candidate rest and regroup when needed. Prepare greeters, facilities and all parties involved for any special needs, both known and unforeseen, to ensure a smooth and welcoming experience for each candidate.
- Plan a final check-in the last working day prior to the interview day to confirm the candidate has everything they need.

Be aware of and avoid potential for bias that may occur from...

- Neglecting to reach out to candidates in advance to provide them with needed information as a means of testing their cleverness.
- Treating candidates differently based on first interactions over the phone and pre-established rapport, providing more assistance to one candidate over the others.
- Making assumptions based upon the candidates appearance, whether dressed to formal or too casual, facial piercings or tattoos, reacting to differences in appearance and attire based on non-work related criteria.
- Being non-forgiving when candidates experience unexpected difficulty, such as arriving late for justified reasons.
- Offering some candidates opportunities, such as campus tours and meeting additional staff members, but skipping that step on others.
- Not preparing in advance for candidates with special needs, such as access to elevators and ramps for tours, or any other accommodation required.

Engage in Final Deliberations

So now, you are almost there. Campus visits, interviews and forums are complete and it's time to gather the search team to deliberate and select the one, or perhaps two candidates who stood above the others and to whom you will check references and consider for an offer of employment. As with every stage of the search process, we need to be mindful of potential pitfalls and proactively engage countermeasures to prevent unconscious bias from influencing our hiring decisions.

The pitfalls are all still there. The hiring supervisor and search teams have already received training, reviewed and discussed the potential for biases, such as in-group favoritism and conflict avoidance. They have developed and agreed upon hiring criteria and determined a means of preventing uncritical or unarticulated departures from it. They have developed relevant interview questions that helped to align the candidates knowledge, skills and abilities with those established in the position description and the previously agreed upon hiring criteria.

Here's the bottom line: this is not the time for the search committee to go rogue. All of the good work put in by the hiring supervisor and search team can go up in smoke if the team does not hold true to our [Mission, Values and Strategic Goals](#).

Remember what we said at the outset of this document: Equity, diversity, and inclusion are not obstacles to merit. To the contrary, they are essential ingredients that help ensure that our hiring processes live up to our values of equity and excellence.

In addition to the bias preventions we have already covered, we've included a few additional tips and tools to store in your cache. Because you know your recruitment and search needs better than anyone, we invite you to consider how best to utilize the following countermeasures during your final deliberations.

Remember and practice what you have learned:

You've taken notes, filled out rubrics, and questioned your initial judgments. Now, individually and collectively, recall your objectives and the articulated job criteria, review the ground rules for deliberation, refer back to your notes, and keep an open mind.

Assign each finalist a champion and a devil's advocate:

The goal is not to advocate for any particular candidate, but rather to make sure that no one falls through the cracks by lack of a champion, and that no one gets a free pass due to support from an influential search member or hiring authority.

Take the time you need to engage in full, open debate:

By slowing down and canvassing more opinions and perspectives, we are less likely to fall victim to in-group favoritism, confirmation bias, or implicit biases that undermine our assessments of merit.

Embrace the friction that is often generated by meaningful diversity:

Ideally, differing perspectives will arise during final deliberations. Do not shy away from the conflicting viewpoints. Instead, embrace it as a virtue that should foster meaningful discussion and support better hiring decisions.

Follow up with all search team members:

Take the time to check back with all of the search team members to assure they were able to speak freely about their thoughts and observations for each candidate. Convey your appreciation and offer any tips or tools for future recruitments or search activities of which they may be involved. Remind search team member of their vow of confidentiality, which continues after the hiring process has completed.

Personally notify the candidates who will not receive an offer:

How we say no to a candidate is a direct reflection of our values. We must leave each candidate with a positive and respectful view, which a timely and personal notice will achieve. This positive impression may affect our ability to draw future candidates as an employer of choice.

Record and retain the rationale for your hiring decision:

All recruitment and hiring documentation is retained pursuant to public records retention statutes and serves to support our hiring decisions. If your hiring decision is challenged, your explicit rationale will be examined and scrutinized for both lawful and equitable hiring practice.

Reference Checking

References are an invaluable component to the interview process, allowing hiring supervisors and search team members to gain further understanding of candidates' professional accomplishments and approach. A consistent method of obtaining and reviewing references will contribute to a more thorough and fair assessment of candidates. In many recruitment scenarios, reference calls are made after the individual has been interviewed and before the negotiation of an offer, but the exact timing of reference checks may vary and possibly occur prior to and after the top candidates(s) are identified.

By now, search teams have gathered broad, well-balanced information about each candidate through application screening, phone, skype or in-person-interviews. Conducting thorough reference checks provides opportunity to research questions and concerns that arose during screening and/or interviews. When planning and conducting reference conversations, it is equally important to maintain the same careful considerations of bias as have been considered through each of the previous sections of the search process. Reference questions and topics for discussion must be related to the candidate's ability to perform the responsibilities of the job. Remember that questions that are not suitable to ask candidates during interviews are also not appropriate to ask of their references.

Phone calls to candidates' references should never come as a surprise. LBCC's online employment application form includes authorization for the college to conduct reference calls as part of the screening process. However, as a courtesy, the hiring supervisor and/or search team should notify the candidate, during interviews or another time, but prior to making reference calls. In addition, the candidate's should be asked if there is anyone whom should not be contacted, for example, the candidates' current employer. If that is the case, the request should be respected and not necessarily be interpreted as a candidates attempt to evade or elude providing solid references.

Reference checks should be respectful, professional, engaging and consistent for each candidate. To obtain a thorough reference checks, be certain the candidate has provided adequate references, which includes professional and personal contacts. Best results can be achieved by:

- Being equitable in seeking background information on all candidates, including internal or "known" candidates when appropriate
- Deciding in advance, who will conduct the reference checks, taking into account the time, availability, training, and consistency throughout the entire process; and having more than one committee member listen to, correspond with, or evaluate references

- Being prepared to tell each reference the role and key responsibilities of the job you are filling and the essential duties the candidate will be performing
- Including open-ended questions that help to learn about the candidates specific experiences, abilities, and transferrable skills relevant to the job; and evidence crucial to the candidates accomplishments and performance record of working with supervisors, peers, subordinates, students and/or customers
- Designing questions intentionally focused on the candidate's role in supporting the college's mission, values and dedication to diversity, equity, and cultural competency; asking questions about the candidate's experiences and contributions to diversity and culturally inclusive endeavors.
- Allowing the reference to ask you clarifying questions and to offer additional performance, skills or transferrable skills related to the candidates fitness for this specific job
- If relevant, asking the reference if they would rehire the candidate. Then asking why, or why not?
-

Mitigate potential bias that may occur from...

- Failing to obtain permission to contact references, and/or failing to notify the candidate before you contact references which can jeopardize the candidates standing with their current employer, and may impact the accuracy of the reference information received
- Relying only on reference contacts provided by the candidate, failing to investigate additional references from former employers or colleagues, assuming former employers won't provide reference information related to performance
- Poorly constructed reference checks not focusing on relevant job criteria, allowing conversations to lead into inappropriate areas of inquiry
- Inconsistencies in questions that unfairly advantage an already preferred candidate and limit discovery of strengths of unrepresented or less favored candidates
- Biased references against a candidate for reasons not related to performance or ability to do the job, or subtle references in language choices that may indicate an unconscious bias against the candidate that may not be obvious to you or to them
- Reading between the lines or inaccurately forming conclusions about what the reference may be implying but not actually saying, failing to ask for clarification
- Relying only on one person to conduct or hear reference information potentially misunderstanding or misconstruing references statements or opinions, and possibly missing important information

Stop and Check in with HR: VP approval must be obtained prior to advancing to Stage 4 and making the offer.

Stage 4 - Making the Offer

Making the Job Offer

Now, you're ready to make the job offer. And now, to some extent, the tables are turned and the candidate will be interviewing us. While no recruitment process can give candidates everything they want, all candidates should leave feeling like they were treated fairly and equitably. If we have done our job well, the candidate will want to come to work for LBCC, and believe they will be welcomed, included, and that the college will invest in them and their future.

Every interaction matters, particularly for minorities and underrepresented groups who often have genuine concerns about whether they will feel at home at LBCC. Candidates may not openly express these concerns, but they will have been taking mental notes, during their campus visit, interviews, and subsequent communications, one interaction at a time. They will notice actions and omissions, what's been said and what's left unsaid, and they will surely be comparing our performance to other colleges, universities, and employers who are also trying to recruit them.

During this stage, significant pitfalls can occur when hiring supervisors fail to invest equally in recruiting all candidates. Meaning, if certain candidates receive more enthusiasm from the search committee and hiring supervisor than others, this can send subtle, but often negative signals to those candidates who landed in second or third place. Remember, we are being recruited too, and at this point in time, we do not have a guarantee our favorite candidate will accept the position. When a second choice or less popular candidate is ultimately hired, the failure to extend the same level of enthusiasm when offering the job, and preparing to welcome a new employee, can send poignant signals that can invalidate the college's true commitment to equity and inclusiveness.

Typically, a hiring supervisor will notify Human Resources either of their intent to hire a candidate, verbally or electronically through the colleges Applicant Tracking System. Often, a hiring supervisor may have already extended a tentative, verbal offer. It is important to note that all offers of employment are contingent upon acceptance of the terms and conditions stated in the official offer letter.

Drafting the Official Offer Letter

Human Resources will work with the hiring supervisor to draft the appropriate offer letter as quickly as possible. Offers letters may differ based upon several factors, but the most apparent is the positions' classification. Salary ranges, including starting salaries, and all terms and conditions are subject to [Board Policies](#) and [Collective Bargaining Agreements](#) and will be governed by those respective policies and agreements. Remembering all that we have learned, worked and prepared for, and all that is at stake, when extending an offer of employment, hiring supervisors should:

- Confirm initial compensation and benefit information as quickly as possible. If salary placement is pending, notify them when they will receive the official offer letter and whom they will receive it from (i.e. the hiring supervisor or directly from Human Resources).
- Demonstrate enthusiasm and genuinely welcome the candidate. Offer them additional information about the new job and what they can expect in their first days and weeks on the job.
- Offer assistance were possible and provide information and/or access to resources for transition and relocation, if appropriate.
- Provide key contact phone numbers and emails, such as Human Resources, Family Connections, and department administrative assistants for questions that may arise before they begin work.
- Remember to thank them for their interest in our college, our mission and goals, and the time and energy they brought to the recruitment and search process.
- Keep in touch. If the process for salary placement or drafting the official offer letter takes longer than anticipated, keep in contact with the candidate and reassure them, don't assume they will simply wait.

Avoid potential bias that can derail your offer by...

- Taking too long to deliver the official offer letter, and/or not providing complete or accurate terms and conditions.
- Inconsistent terms and conditions, such as requiring background checks for some candidates, but not all candidates.
- Providing too short, or too long of time period for the candidates acceptance, or again, being inconsistent in the response time for all candidates.
- Failing to address potential challenges that may be faced by minority or underrepresented identity candidates as they transition to a new job, company and community .
- Not anticipating and/or not quelling the rumor mill; for example, gossipy statements indicating the candidate was an “affirmative action hire” or “hired only because they are a person of color”.
- Failure to plan for the new hires integration into the department, program or discipline. Not informing your existing staff of the new persons start date and assuring they are supportive and ready to welcome the new hire.

Evaluating the Search Process and Selecting Our Candidate

With the invaluable time and assistance of the search team and all other stakeholders involved throughout the search process, you have evaluated, interviewed, deliberated over, and confirmed references for your top candidates. The time has now come to make your decision. The search team does not select the appointee, but their role is still not complete. In every department and program, our search teams do LBCC a great service when they reflect upon the search they just led. By documenting, debriefing and sharing the lessons learned throughout the search process, we assure we have taken appropriate steps to mitigate bias and provided equity and inclusive consideration of all applicants. In addition, this helps ensure our future searches will follow consistent practices that will continue to recruit high quality and diverse faculty and staff for the college and the students we serve.

Hiring supervisors and search teams should ask themselves the following questions to evaluate the search process. Although this may seem a repetitive exercise, the stakes are high and the outcome of our hiring decisions a crucial component in the pursuit of our collective Mission. The team should feel free to include any other questions it feels are pertinent to evaluating and assuring an equitable and inclusive search is accomplished.

- Was the position description and search criteria constructed in a way that brought in a broad and diverse pool of candidates?
- Was the advertising and outreach to minorities, diverse and underrepresented job seekers sufficient? If minority applicants did not rise to top ranking order, did we discuss thoroughly and document the reasons? Did we assure the reasons were directly relevant to the essential duties of the job?
- Did the search process honor and value candidates with demonstrated commitment to enhancement of diversity, equity and inclusive practices in teaching and learning?
- Were all members of the search team able to openly express their opinion and concern about all candidates? Was anyone silenced or overwhelmed by majority opinion?

- Were qualified Veteran candidates given the full measure and consideration required under Veterans Preference laws? Has the hiring supervisor and/or search team clearly documented that process?
- Is the hiring supervisor and/or search team prepared to articulate the reasons non-selected candidates did not rise to the top and/or were not selected?
- In the event the appointee does not accept the job offer, is there a clear second choice? Have you developed a strategy if that happens?
- Have you informed the Dean, Director, or Vice President of your division the results of the search process and the choice of candidate? Have you received their approval?

Stop and Check in with HR: Confirm New Employee Orientation and other misc. onboarding plans. Confirm recruitment and search documents are all submitted.

Stage 5 - Hiring Success!

Document Hiring Rationale and Summary

Our search process has ended, the candidate has accepted the job, and has arrived on campus. The search is over, but the search team's job is not complete. By this time, the search team has spent hours, days, and weeks getting to know the candidate and are a valuable and integral asset to help integrate them into their position and the broader LBCC community. Welcoming our newest faculty or staff and assuring they receive the full support of a new hire demonstrates our genuine commitment, not just to diversity on campus, but to our greater goals of creating opportunity and prosperity for our communities and the world.

Search team members are well positioned to anticipate the potential challenges faced by newly hired staff and serve as campus leaders in shaping the post-hire climate for all new hires, and especially those from underrepresented identity groups. It is vitally important for hiring supervisors and search teams to think about retention as we continue the work toward achieving [our Mission, Values and Strategic Goals](#) of building a richer, more inclusive, and excellent learning community.

In Closing

We are proud of and grateful for the dedication of our hiring supervisors and search teams and know their hard work today will impact the landscape of LBCC's faculty, leadership, and staff for years to come. Without a doubt, the stakes are high. With this in mind, we created this guide to equip search teams with strategies and tools that, if thoughtfully and diligently employed, will promote a more equitable search process. We realize, however, that everything can and should be improved. We welcome your feedback, questions, critique, or anything else you would like to share concerning this document. Above all, thank you for reading all the way through and demonstrating your personal commitment to LBCC's collective mission to build equity, diversity, and inclusion for all.

Veterans Preference Employment Information

The Oregon Veterans' Preference in Public Employment (ORS 408.230)

Oregon law requires that public employers grant certain preferences in the hiring and promotion of veterans and disabled veterans. As such, Linn Benton Community College extends an affirmative preference at each stage of the hiring process to all individuals who self-identify as qualifying veterans and who meet the minimum qualifications listed in a position description.

All job postings will instruct veteran applicants to attach proof of honorable discharge (Form DD 214) to receive preference. Human Resources will conduct an initial screening of all applicants, if the applicant meets the minimum qualifications and has attached their DD-214, they will be flagged as "Qualified Veterans" in the applicant tracking system.

The search committee will then evaluate application materials from all candidates to determine the extent to which each applicant meets preferred qualifications and shows evidence of job related knowledge, skills and experience. The hiring supervisor will invite qualified veterans to interview along with other top candidates. Candidates will be rated and the appropriate veterans' preference score will be applied using the scoring examples below.

Scored selection process:

Veteran and disabled veteran candidates eligible for preference should be awarded an additional 5 (veteran) or 10 (disabled veteran) percentage points of the total possible points in calculating their scores.

For example: If using a scored tool with a total of 60 possible points, a veteran will receive an additional 3 points (5% of total possible points) and a disabled veteran will receive an additional 6 points (10% of total possible points). It is recommended that the preference be applied to either the total combined or total average score and not to individual reviewer scores. If possible, preference should be applied by one individual to ensure it is applied consistently.

- **Total combined score method:** If 3 people are scoring using a tool with 60 possible points and the combined scores are used to rank the applicants, then there is a total of 180 possible points and a veteran will receive an additional 9 points and a disabled veteran will receive 18 additional points; or
- **Total average score method:** If, out of 60 possible points, the results of 3 scorers are 40, 35, and 30, the average score is 35. Again, because there is a total possible score of 60, the veteran will receive 3 additional points and the disabled veteran will receive 6 additional points.

Advance any veteran whose score, with or without the preference, is at least equal to that

of other candidates being advanced.

Non-scored selection process:

Develop a methodology that ensures “special consideration” of veterans and disabled veterans. While not defined in the legislation, this will generally mean giving case-by-case consideration to veteran or disabled veteran qualifications to assess whether they are roughly equivalent to the qualifications of those being advanced – “roughly” meaning within about 5% (for veterans) or about 10% (for disabled veterans). One method of giving “special consideration” is to categorize, rank or rate applicants and then consider whether a 5% or 10% preference would move the qualified veteran up into the next category, rank or rating. Advance any veteran or disabled veteran who, with or without special consideration, is at approximately the same relative level as other candidates being advanced.

Selection following interviews

The final selection decision should be based on the application review and interviews, with the veterans’ preference again applied for any veteran or disabled veteran candidates after the final interviews and deliberation. The Oregon Veterans Preference in Employment legislation does not require that a public employer appoint a veteran to the open civil service position. However, if a veteran’s or disabled veteran’s score, rank, rating or other qualitative assessment, with required preference, is equal to or higher than the results for a non-veteran applicant, then the veteran or disabled veteran shall be appointed.

Documentation

The legislation requires that if a public employer does not appoint a veteran or disabled veteran to a vacant position, the employer shall, upon written request of the veteran or disabled veteran, provide in writing the employers’ reasons for the decision not to appoint the veteran or disabled veteran to the position. The decision not to appoint the veteran or disabled veteran may be based solely on the veteran’s or disabled veteran’s merits or qualifications with respect to the position.

For questions regarding Veterans Preference please contact the HR office at (541) 917-4436 or email employ@linnbenton.edu

UCLA Implicit Bias Video Series

https://cdnapisec.kaltura.com/index.php/extwidget/preview/partner_id/601682/uiconf_id/38865202/entry_id/0_dd98gqsb/embed/dynamic

Hiring Guide Presentation

The lofty mission of Linn-Benton Community College, and our strategic goal of Equity demand an intentional approach to recruitment and hiring. If we are to engage in an education that truly enables ALL OF US to participate in, contribute to, and benefit from the CULTURAL RICHNESS and economic vitality of our communities, we have work to do to ensure our workforce reflects the demographic makeup of our communities. Our students have shared this with us loud and clear, that...*"if I see more people who look like me it would add to my educational experience and make it more likely that I stay and complete my degree/certificate."* Statistically speaking, colleges with more diverse workforces have lower rates of attrition and turnover among students of color. Our hiring practices not only determine whether we successfully recruit the best talent, but also signal whether our commitment to equity, diversity, and inclusion is alive and well.

This training introduces hiring managers to structural changes that are intended to mitigate our human tendency toward unconscious bias in favor of "sameness". This is just the beginning of a collaborative dialog that we hope will include all levels of staff, and focus on how we can recruit and hire in a way that supports learning and completion for all.

https://cdnapisec.kaltura.com/index.php/extwidget/preview/partner_id/601682/uiconf_id/28127352/entry_id/0_1bsk1alj/embed/dynamic

CLASSIFIED APPRAISAL PROCESS

Who is responsible for conducting the appraisal?

The immediate supervisor is responsible for each classified employee's performance appraisal. The official position description designates the immediate supervisor. The employee and the supervisor should agree on the position's major duties and responsibilities. To maximize the effectiveness of this mutual identification, the supervisor and the employee should discuss and agree on behavioral indicators of performance as well. However, identifying job duties and responsibilities as well as performance indicators is, in the final analysis, a supervisory responsibility.

What is the process?

1. The employee should be encouraged to do a self appraisal utilizing the classified appraisal form. The supervisor completes his/her appraisal independent of the employee's self assessment.
2. At a prearranged time, the employee and supervisor should meet to compare their thoughts and ratings using their draft copies. Both should be prepared with specific concrete examples to substantiate their ratings.
3. The final copy is then completed by the supervisor (see instructions below).
4. Following the review and discussion of the assessment, both the employee and the supervisor should sign the finalized form. The employee should then make a copy for his/her personnel file.

The employee's signature does not necessarily indicate agreement with the appraisal. It indicates that the appraisal has been discussed with him/her.

5. The employee is encouraged to add any additional comments in the form on an addendum. If an addendum is added, it must be signed, dated, and copies provided to the supervisor and the reviewing authority.
6. The final copy is then routed to the appropriate administrator for review. After signing and dating, the form is then forwarded to Human Resources for review and placement in the employee's personnel file.

How are the new appraisal forms used?

There are three sections to the Classified Staff Performance Appraisal form:

- Section I - Work Habits and Standards

Work habits and standards listed in this section are a number of factors which are important for successful performance in most jobs.

1. Relate each standard to the current job duties as found on the job description. Carefully

review each major job duty and responsibility performed during the period being rated as it pertains to each work habit and standards.

2. If the supervisor would like to include feedback from peers, customers and/or colleagues, they should use Form A: Input from Peers/Colleagues/Customers for Contracted Classified.
3. Indicate the performance level for each factor with a rating of 3 to 1, using the definitions of performance standards below. Make comments regarding specific job performance (positive or needing improvement) in the box below each standard.
4. For a position requiring an extensive training program, consider the employee's relative length of service in making the assessment of past performance.
5. Ratings of "Needs Improvement" should be addressed in Section II with specific examples and concrete objectives for future performance.

Definitions of Appraisal Categories

(3) **Exceeds Expectations** Performs with little or no supervision. Looks for ways to achieve excellence.

(2) **Meets Expectations** Performs consistently well with supervision. Completes assignments and tasks on time.

(1) **Needs Improvement** Requires much supervision. Inconsistent performance.

(NA) **Not Applicable or Observed**

- Section II – Job Strengths/Weaknesses and Goals

This section is provided for comments/explanations by the supervisor. Such comments should accurately describe the employee's strong and weak points. For example, this section may be used as positive reinforcement for the employee's strong points and to identify how weak points can be strengthened.

Indicate in what specific area(s) the employee could gain additional career growth or Professional Development and identify specific goals to be undertaken during the next evaluation period.

- Section III – Overall Assessment

The supervisor summarizes the overall assessment of the employee's performance by checking the appropriate box. If the supervisor's overall appraisal of an employee's performance is "Needs Improvement," a work improvement plan is required.

Performance Review Do's and Don'ts

1. DO be intentional about creating an honest two-way dialogue

The most common mistake that managers make in performance review is to create or allow a one-way dialogue. Even the most observant and intuitive manager cannot know everything that is going on with their employee. Likewise, if the employee does all the talking, the manager can be shut out of giving important developmental guidance. Only with a foundation of trust and honest two-way communication can real performance development take place. Anything else is lop-sided communication that at best is a waste of time, and at worst leads to a diminished relationship and diminished results.

2. DON'T fall prey to 'halo effect'

Managers sometimes allow a single characteristic to influence their ratings of other unrelated factors. For example, an employee is willing and capable of taking on any project. That outstanding trait can cause the supervisor to ignore a worker's shortcomings. It just feels wrong to give Joyce a 3 on initiative and a 2 on everything else. But it may be accurate.

Advice: Eliminate the halo effect by considering each review element independently.

3. DON'T be overly lenient

Managers often either feel uneasy about criticizing employees' efforts or may allow emotion to cloud their judgment of their long-term employees. Leniency hurts company performance because it fails to flag weaknesses. Plus, in court, employees fired for poor performance will point to positive reviews as proof of discrimination.

4. DON'T be overly harsh

Overly harsh assessments are demoralizing for workers who make relatively consistent positive contributions. The antithesis of the halo effect... this tendency to over focus on the rare mistake can result in resentment and diminished motivation.

5. DO go high and low

"Central tendency assessment" occurs when a supervisor gives all workers average ratings. This attitude can depress employee morale and indicate that the supervisor isn't doing his or her job.

Advice: Keep detailed employee logs and record instances of superior and inferior performance.

6. DO focus on pros and cons

Many managers give little credit to excellent work and focus almost exclusively on weaknesses and "needs improvement" areas. Review forms are famous for encouraging this type of behavior. Give equal time to each aspect of the performance review, regardless of the assessment. Don't nitpick or try to find something wrong where no problems exist.

7. DON'T compare workers

There's no need to discuss how other workers achieve their goals. This allows the discussion to shift away from the core issue: his or her work. Drawing comparisons among workers only builds resentment. Assume that all your employees are capable of superior performance and talk only about ways to enhance their efforts.

8. DO stay on track

Because reviews are stressful, it's human nature to want to talk about anything except the subject at hand. But it's important not to let the discussion get sidetracked. Have scheduled, uninterrupted time and a written agenda prepared that you can refer to frequently. You're there for only one reason. Stick to it.

9. DON'T contradict yourself

One of the most damaging mistakes you can make during a review is to send the employee mixed messages. Know what you want to say, put it on paper and talk it through in advance so that you can catch any errors in your logic. Contradictory messages erode your credibility and do nothing to improve the employee's performance

LINN-BENTON COMMUNITY COLLEGE
CLASSIFIED STAFF PERFORMANCE REVIEW

Name: _____

ID#: _____

Title: _____

Department: _____

Employee Status: Trial Service

Regular

Temporary

Date completed form is due in Human Resources: _____

GENERAL INSTRUCTIONS: This appraisal is based on the employee's job duties and responsibilities and the Colleges standards for the work performed. If additional pages are necessary, the employee and supervisor must initial each page.

SECTION I: WORK HABITS AND STANDARDS

- (3) **Exceeds Expectations** Performs with little or no supervision. Looks for ways to achieve excellence.
- (2) **Meets Expectations** Performs consistently well with supervision. Completes assignments and tasks on time.
- (1) **Needs Improvement** Requires much supervision. Inconsistent performance.
- (N/A) **Not Applicable or Observed**

Please use the codes above for your responses to rate the employee's performance. Relate each standard to the current job duties as found on the attached job description. Make comments regarding job performance (positive or needing improvement) in the box below each standard.

STANDARD

SCORE

3 - 1

| | |
|---|--|
| 1. Initiative/Self Motivation – Assesses what needs to be done to accomplish job responsibilities, and with a minimum of supervision, takes appropriate action to complete assigned tasks. | |
|---|--|

| | |
|--|--|
| 2. Adaptability/Flexibility – Responds to changing conditions and requirements in a positive and constructive manner. | |
|--|--|

| | |
|---|--|
| 3. Judgment/Professional Behavior – Makes sound decisions and bases actions on fact rather than emotion. | |
|---|--|

| | |
|---|--|
| 4. Confidentiality – Keeps in confidence information encountered in the working environment. | |
|---|--|

| | |
|---|--|
| 5. Interpersonal Relationships/Teamwork – Demonstrates what to do and/or say to keep good relations with others and a willingness to work within a group approach to achieve an efficient operation; responds in a positive and constructive manner. | |
|---|--|

| | |
|---|--|
| 6. Completes Assigned Work Accurately – Accomplishes tasks accurately, neatly, thoroughly, and efficiently; completes work in allocated time under normal circumstances. | |
|---|--|

| | |
|--|--|
| 7. Attendance & Punctuality – Complies with absence, tardiness, break and attendance rules. | |
|--|--|

| | |
|--|--|
| 8. College Procedures – Follows applicable Board policies, appropriate use of technology and other regulations. Follows safety regulations. | |
|--|--|

9. Communication

- a. Writes in an effective manner.
- b. Speaks in an effective manner.
- c. Actively listens in an effective manner.

SECTION II

Comments concerning job strengths and/or weaknesses relating to the specific performance of job duties as outlined on attached job description.

In what specific area(s) could the employee gain additional career growth or professional development? Identify specific goals to be undertaking during the next evaluation period.

SECTION III

Supervisor's overall evaluation of employee's performance:

- Exceeds Expectations Meets Expectations Needs Improvement

This is to certify that this appraisal has been discussed with me. I understand that my signature does not necessarily indicate agreement and I can attach an addendum to this evaluation.

I have reviewed my job description with my supervisor and I know what responsibilities I will be appraised on at my next anniversary appraisal.

Employee Signature: _____ Date: _____

Immediate Supervisor Signature: _____ Date: _____

Administrator Signature: _____ Date: _____

Human Resources Signature: _____ Date: _____

- Original job description attached with no changes.
- Revised job description attached with changes indicated

**LINN-BENTON COMMUNITY COLLEGE
PERFORMANCE REVIEW FOR TRIAL SERVICE EMPLOYEES**

This form is **ONLY** to be used three months after date of employment. A more detailed Classified Staff Performance Review form is used for six months, yearly, and all other reviews.

Employee Name:

LBCC ID #:

Department:

- | | | |
|---|-----|----|
| 1. Employee understands job duties: Specific Strengths: | YES | NO |
| 2. Employee is meeting department job standards: | YES | NO |
| 3. Employee is progressing on schedule at this point: If not, explain: | YES | NO |

4. Supervisor and employee have discussed job problems, if any, and specific plans for improvement include:

Supervisor Signature

Date

Employee Signature

Date

♦ Return to Human Resources, CC-108.
or email to employ@linnbenton.edu

INPUT FROM PEERS / COLLEAGUES / CUSTOMERS FOR CONTRACTED CLASSIFIED

FORM A

Appraisal of:

Your name:

- (3) **Exceeds Expectations** Performs with little or no supervision. Looks for ways to achieve excellence.
- (2) **Meets Expectations** Performs consistently well with supervision. Completes assignments and tasks on time.
- (1) **Needs Improvement** Requires much supervision. Inconsistent performance.
- (NA) **Not Applicable or Observed**

Please use the codes above for your responses.

SCORE 3 - 1

1. Initiative / Self Motivation - Assesses what needs to be done to accomplish job responsibilities, and with a minimum of supervision, takes appropriate action to complete assigned tasks.

2. Adaptability / Flexibility - Responds to changing conditions and requirements in a positive and constructive manner.

3. Judgment / Professional Behavior - Makes sound decisions and bases actions on fact rather than emotion.

4. Confidentiality - Keeps in confidence information encountered in the working environment.

5. Interpersonal Relationships / Teamwork - Demonstrates what to do and/or say to keep good relations with others and a willingness to work within a group approach to achieve an efficient operation; responds in a positive and constructive manner.

6. Completes Assigned Work Accurately - Accomplishes tasks accurately, neatly, thoroughly, and efficiently; completes work in allocated time under normal circumstances.

7. Attendance & Punctuality - Complies with absence, tardiness, break and attendance rules.

8. College Procedures - Follows applicable Board Policies, appropriate use of technology and other regulations. Follows safety regulations.

9. Communication

- a. Writes in an effective manner.
- b. Speaks in an effective manner.
- c. Actively listens in an effective manner.

Comments:

Faculty Performance Appraisal Handbook

Updated 5/2021

The primary purpose of the faculty performance appraisal process is the continuous improvement and professional growth of faculty. The following principles are at the core of the process:

- Is collaborative in nature in order to maintain strong working relationships and accountability for managers and faculty.
- Is based on collaborative goal setting for the appraisal period.
- Is multi-sourced and tailored to the individual rather than a "one size fits all" model.

Considerable effort is undertaken to employ faculty members who are fully qualified in their discipline, who have demonstrated or shown potential for significant professional growth, and who are committed to the mission, values, and goals of Linn-Benton Community College.

It is expected that faculty members, whatever qualifications or experience they possess upon initial employment, will mature as professionals and continue to grow throughout their careers. The appraisal system nurtures new faculty by providing opportunities to enhance understanding of the vision, mission, philosophy, and goals of the department, division, and college.

Professional growth is the primary purpose for faculty appraisal at LBCC. Secondly, the appraisal process establishes a pattern of performance over time that may be used for personnel decisions in accordance with Article 22 of the Faculty Association Agreement. The faculty appraisal process will not be used in place of any of the discipline steps outlined in Article 23 of the Faculty Association Agreement.

Information gathered for the appraisal process comes from many sources- learners/clients, peers/colleagues, support staff, administrators, and self-reflection. It is ongoing, formal or informal, wide-ranging, and provides a basis for professional growth. It is through professional growth that the college maintains and strengthens the quality of faculty at the institution.

In keeping with LBCC's commitment to continuous improvement, there is also the need for ongoing development of the appraisal system. Throughout the process of refining and revising, the appraisal system will continue to adhere to these objectives:

- Assess the strengths and weaknesses of faculty for the purpose of encouraging continuous improvement and professional growth.
- Assess teaching and learning effectiveness through a comprehensive, purposeful, and meaningful process.
- Assess performance of trial service faculty for the purposes of retention and/or awarding non-trial service status.
- Assess performance of all faculty to ensure faculty excellence.

Process

The following four components of the appraisal process will be completed every year by trial service faculty and every three years by non-trial service faculty.

1. Faculty Observation
2. Feedback from Others
3. Reflection
4. Goal Setting

Instructions for completing each of these four components comprise the bulk of this handbook. As faculty are completing their reflections and goal setting, they should keep in mind the six faculty roles and the college-wide values, strategic goals, and core themes (see Appendix F).

The handbook contains the following additional materials:

- Appendix A: Peer/Colleague Input Form
- Appendix B: Sample Observation Report
- Appendix C: Sample Peer/Colleague Input
- Appendix D: Sample Reflection
- Appendix E: Sample Goal Setting
- Appendix F: Six faculty roles and college-wide values, goals, and core themes.
- Appendix G: Faculty Appraisal Summary

Appraisal Year Timeline

Trial Service Faculty

Throughout the year

- Learner/client feedback will be gathered on a regular basis.
- Student evaluations of faculty shall be distributed and collected no later than two weeks before the end of every term.

Spring term (the year before the appraisal is due)

- Faculty member and supervisor meet to discuss goals, work plan, and the appraisal process, especially observation plans and feedback sources.

Fall term

- Complete observation and gather feedback from others.

Winter term

- By February 15, Trial Service faculty member submits the Reflection to their supervisor. Feedback from others is also due at this time.
- Following submission of Reflection and feedback from others, appraisal conference between faculty member and supervisor.
- The Faculty Appraisal Summary form completed by supervisor (and optionally by the faculty member). The supervisor will provide the faculty member with a copy and forward the original to the Academic Affairs office for review by March 10. The Faculty Appraisal Summary is subsequently forwarded to Human Resources for inclusion in the faculty member's personnel file.

Non-Trial Service Faculty

Throughout the year

- Learner/client feedback will be gathered on a regular basis.
- Student evaluations of faculty shall be distributed and collected no later than two weeks before the end of every term.

Spring term (the year before the appraisal is due) or Fall term (year of the appraisal)

- Faculty member and supervisor meet to discuss goals, work plan, and the appraisal process, especially observation plans and feedback sources.

Fall and/or Winter term

- Complete observation and gather feedback from others.

Spring term

- By the end of the second week of term, faculty member submits the Reflection to their supervisor. Feedback from others is also due at this time.
- Following submission of Reflection and feedback from others, appraisal conference between faculty member and supervisor.
- The Faculty Appraisal Summary form completed by supervisor (and optionally by the faculty member). The supervisor will provide the faculty member with a copy and forward the original to the Academic Affairs office for review by the end of the eighth week. The Faculty Appraisal Summary is subsequently forwarded to Human Resources for inclusion in the faculty member's personnel file.

*Each non-appraisal year, the faculty member will meet with their supervisor to discuss goals, work plan, professional development, etc. Faculty members are also encouraged to participate in observation on non-appraisal years.

I. Faculty Observation

Rationale

The purpose of these observation guidelines is to help ensure that faculty receive meaningful feedback during the observation process. Observation feedback is meant to provide a description and/or analysis of an instructional/learning support experience; it is not intended to be explicitly evaluative.

Requirements

Faculty will be formally observed **at least once per appraisal cycle** (multiple observations, by multiple people are encouraged) according to the following requirements:

- Observation is expected to be done by the supervisor, although this requirement can be waived by mutual agreement between the supervisor and the faculty member.
- In the case of waiving the supervisor's observation, the faculty member will be observed by another faculty member(s) or other designee(s) determined by mutual agreement between the supervisor and the faculty member.
- Observers will complete a written observation report and discuss it with the faculty member after the observation (see details below).

Prior to observation

The faculty member will select a mutually agreeable time for the formal observation for the appraisal, identify the specific areas for which the faculty member is most interested in receiving feedback, and provide the observer with any necessary context for the observation (including relevant materials).

After the observation

The faculty will have a follow-up meeting with their observer as soon as possible after the observation, ideally within one week. This will be an opportunity for both persons to reflect on the experience and consider how the feedback can be most useful to the faculty member's pursuit of continuous improvement.

Observation report

The observer should complete the observation report before the follow-up meeting described above. In the case of an observation conducted by another faculty member or other designee, the observation report will be given to the faculty member only, not to the faculty member's supervisor, although this does not preclude the faculty member from submitting it to the supervisor if they choose. Below is a list of possible areas the observer may draw from to produce an observation report. This list is not meant to be exhaustive *nor is it expected to be covered in its entirety*. As mentioned above, specific criteria for the observation should be agreed-upon by the faculty member and observer(s) prior to the observation.

- Teaching style and methods of engagement

- Content knowledge
- Faculty-student interactions
- Use of technology
- Faculty demeanor, persona, presence
- Verbal presentation
- Instructional materials
- Organization and time management
- Student engagement and performance

II. Appraisal Feedback from Others

In order to provide the most complete picture of faculty performance, the appraisal process will gather performance feedback from multiple sources. Feedback sources should include input from peers/colleagues and from students/clients.

Input from Peers/Colleagues

The supervisor will gather feedback from a minimum of three responses from colleagues who have had substantive interaction with the faculty member. These colleagues may include faculty, classified staff, managers, and/or community partners. At least one colleague should be from outside the faculty member's department. These colleagues will be chosen by the faculty member and their supervisor. The tool(s) for gathering input should be determined by mutual agreement between the faculty member and their supervisor. Examples of feedback-gathering tools may include the Peer/Colleague Input Form (Appendix A), other written feedback, a conversation, email, etc.

Input from Students/Clients

Input gathered from students/clients during the appraisal period will be reviewed by the faculty member and their supervisor for overall themes and patterns. The following guidelines will be adhered to when gathering input from students/clients:

- Instructional Faculty (45 credit) faculty:
 - In most cases, feedback will be gathered using the Student Evaluation of Teaching.
- Non-Instructional (33 hour) faculty
 - One or more tools for gathering input from clients may be used by mutual agreement between the faculty member and their supervisor. The tools for gathering feedback should be tailored to each faculty member's job assignment, by mutual agreement between the faculty member and their supervisor. These tools will be used to gather information on client/learner interactions or teaching assignments outside the traditional classroom. These feedback tools are typically used for counselors, librarians, consultants, and faculty members with similar assignments.

III. Reflection

The purpose of reflection during the appraisal process is for faculty to reflect on and make observations about their professional growth, performance as a faculty member, and future direction. Listed below are some items that faculty may choose to reflect upon; however, it is up to individual faculty to include what makes most sense for their specific job assignment. What is included will help inform the faculty member's supervisor of current and future work as it relates to the faculty roles. All six roles do not need to be included in your reflection if one or more of them is not pertinent to the faculty member's current job assignment. However, the following components are required:

- Thoughts on the results of peer/supervisor observation.
- Reflection on goals from the current appraisal cycle (e.g. what got in the way and what worked?).
- Goals for the next appraisal cycle

The format for this reflection is up to individual faculty members, but it may be helpful to keep LBCC's values, strategic goals, and core themes in mind while writing the reflection. The reflection should be submitted to the faculty member's supervisor by the end of the second week of Spring term.

Below are suggestions to reflect upon, although faculty do not have to reflect on *all* of these items, and they reflect on others not listed here:

- Trends or patterns in student evaluations over the course of the appraisal period.
- Progress toward meeting goals established at the last formal evaluation.
- Areas for more training or professional development.
- Emphasis on new or existing pedagogical and/or professional approaches.
- Involvement in campus-wide work and/or community involvement.
- Reflection on relationships within the department, division, college, and community.

IV. Goal Setting

The purpose of goal setting during the appraisal process is to pull together information reflecting the overall goals of the faculty member over the length of the faculty appraisal cycle and in alignment with the six faculty roles. Progress in achieving these goals will be reviewed annually during a “Yearly Check In” with the supervisor. Conversation topics may include the following:

- Workload review and work plan.
- New course/current course development. (e.g. What are you working on?)
- Professional development plans.
- Planning for new materials, new equipment, and other resources.
- End-of-term course outcome report comments.
- Additional relevant topics.

Goals will be developed based on the yearly discussion between faculty members and their supervisors. Faculty may find it helpful to refer to the college-wide values, strategic goals, and core themes while developing their goals. Faculty should include these goals when turning in their Reflection.

Appendix A: Peer/Colleague Input Form

Appraisal of:

Your name:

Based on your direct observations, please give your appraisal of this person's performance of the faculty roles (see other side). You may not be able to respond to some questions because of insufficient opportunity to observe. All responses will be handled in a confidential manner. Note: This is not a rating of the department chair role.

1. Please comment upon the faculty member's performance in the area of Collaboration, Communication, and Professionalism.

2. Please comment upon the faculty member's performance in the area of Learner Support and Development and/or Advising.

3. Please comment upon the faculty member's performance in the areas of Teaching, Community Partnerships, and/or Professional Development.

4. Any additional comments about the faculty member's performance?

Appendix A: Peer/Colleague Input Form

Faculty Roles

Teaching

Responsible for subject matter mastery, curriculum development, instructional design and delivery, assessment of student learning, establishing a positive learning environment and completing related administrative requirements.

Learner Support and Development

Activities which result in a student's personal, social, academic, or career-oriented growth. These may include, but are not limited to, program-related administrative tasks, instructional support, testing, retention/recruitment, consultation, counseling and special event coordination.

Advising

Activities which provide consultation and direction to students regarding their academic and career planning. For Teaching Faculty, responsible for understanding program requirements in the faculty's field of instruction and other programs as mutually agreed upon by the individual faculty member and their dean. For Professional Faculty, responsible for understanding program requirements as assigned.

Communication, Collaboration and Professionalism

Involvement with internal and external constituencies to improve the quality of teaching and learning and the work environment at the College. Responsible for demonstrating professional and collegial attitudes and abilities, as evidenced by participation in college activities – which may include committee and council assignments, department and division responsibilities, appropriate College inservice activities, and other professional duties relating to the assignment - which contribute to the growth and well-being of the department, division and College.

Community Partnerships

Active in developing partnerships with individuals, groups and organizations outside the College. Activities may include the development and management of grants and contracts, provide leadership and management of joint activities, plan and implement coordinated services, plan and present workshops and serve on boards and job-related committees.

Professional Development

Activities which contribute to the continuing development of content expertise, scholarship, skill, and/or professional behavior. These may include participation in short and long term professional organizations, and participation in College and program accreditation activities.

Appendix B: Sample Observation Report

Faculty Member: Professor X

Observer: Dean Z

Title/Description of Instructional Experience: Underwater Basket Weaving Class

Date: MMY Y

Summary of instructional experience: Professor X's underwater basket weaving class began promptly at 1:00 PM with 22 students present. The main objective of the class session--how to properly construct a basket handle--was identified on a computer slide projected at the front of the classroom. After greeting students, Professor X began with a brief review of the previous class period's lesson. She posed several questions to students, who responded eagerly for the most part. Occasionally Professor X asked students to clarify or expand upon their responses. The review session lasted about 10 minutes and ended with a reminder about an accompanying assignment due for next class period.

Professor X then transitioned to the main lesson for the day. She spent 20 minutes delivering a lecture on the two most common techniques for constructing basket handles: vertical crosshatch and horizontal overlay. The lecture was supplemented with computer slides and a short instructional video that demonstrated some of the principles covered in her lecture. During the lecture most students appeared engaged in the presentation; some chose to take notes, while others simply listened. Twice during the lecture, Professor X paused to ask if any students had questions; none did.

The remainder of the class period was devoted to an ungraded assessment that asked students to begin creating their own basket handles. Professor X provided students with their working materials and explained that those on the left side of the classroom would be practicing vertical crosshatch, while students on the right side would be practicing the horizontal overlay. 25 minutes would be allotted for individual work on basket handles, and the remaining 20 minutes of the period would be devoted to students examining and critiquing the progress their peers made on their basket handles.

A few minutes into the activity, Professor X began to meander around the classroom to check on student progress. In some cases, she asked questions about students' techniques and/or pointed out areas of concern regarding certain aspects. In one case she modeled a technique for a student who was noticeably struggling. Most students made steady progress, although a few seemed frustrated with their lack of progress in comparison to some of their peers. At one point a student asked if Professor X could replay one of the instructional videos used during lecture. Professor X initially declined, stating that the student should rely instead on his lecture notes, although she then changed her mind and played the video with the sound lowered so as to not distract other students. Several students stopped working to compare their work to the example in the video.

After 25 minutes, Professor X asked students to stop their work and set their handles in a row on one of the classroom tables. She then asked each group to spend a few minutes examining each handle and offering feedback on it. Some students were initially a bit hesitant to do this, perhaps out of uncertainty in their knowledge or trepidation in pointing out weaknesses in their peers. In both groups, a few vocal students seemed to lead the feedback. Student work ran the gamut. A few handles were nearly completed, while others were only barely begun. Professor X spent a few minutes observing each group, occasionally offering her own feedback on some of the student models. She was careful to phrase her comments in a supportive way, emphasizing that students were just being introduced to these techniques and that several opportunities for additional practice were planned for upcoming class sessions.

The student group working on horizontal overlay finished their feedback session quickly, and their conversation seemed to stray off-topic. The other group was still discussing their feedback when the class period came to an end. As students packed up, Professor X reminded them of the assignment due for next class and that the required reading for the next meeting could be found on the syllabus.

Additional notes and observations:

- It was quickly apparent that Professor X knows her students' names.
- During the lecture portion of the class period, Professor X varied her movement throughout the classroom; she didn't stay fixed behind the computer cabinet.
- A few students were occasionally distracted by their electronic devices (i.e., covert texting under the table).
- At least one student in the back row seemed to have difficulty reading the text on some of the computer slides that were projected.
- During the lecture portion, Professor X's voice was loud enough to be heard by everyone, although at times a few students appeared to have some difficulty in taking notes quickly enough to keep up with her speaking rate.

Questions:

- Do the same vocal students tend to dominate class discussion?
- Could the peer-review portion of the in-class activity be enhanced by providing students with a checklist of criteria on which to evaluate their peers' work? Perhaps this could be a rubric that is similar to what will be used to formally evaluate students' own work?
- Could the in-class activity be adapted in some way so that groups could interact with each other? This would allow students to see examples of both techniques for construction basket handles.

Appendix C: Sample Peer/Colleague Input

Appraisal of: Professor X

Your name: Professor Y

Based on your direct observations, please give your appraisal of this person's performance of the faculty roles (see other side). You may not be able to respond to some questions because of insufficient opportunity to observe. All responses will be handled in a confidential manner. Note: This is not a rating of the department chair role.

1. Please comment upon the faculty member's performance in the area of Collaboration, Communication, and Professionalism.

I serve on the Campus Beautification and Employee Ego-boosting committees with Professor X. As the chair of the Campus Beautification committee, Professor X is very organized and skilled at keeping the group on track and moving forward. She is very careful to ensure that all voices are heard and that committee decisions are communicated to all stakeholders.

2. Please comment upon the faculty member's performance in the area of Learner Support and Development and/or Advising.

Professor X is one of the most knowledgeable advisors on campus. I have gone to her several times for clarification on course transfer, graduation requirements, etc. and she has always been able to quickly answer my questions. She mentored a CWE student employee last year, overseeing their planning, curation, publicity, and set-up of an exhibit of local artists. Her patient guidance of this student not only led to a successful show, but also much growth for the student. She has an open door for her own advisees and appears to have good rapport with them. Professor X makes sure that her knowledge of the career choices for students remains current so she can correctly advise them, and her confidence and knowledge is appreciated by all the students she helps, as well as other faculty.

3. Please comment upon the faculty member's performance in the areas of Teaching, Community Partnerships, and/or Professional Development.

I have not had the opportunity to observe Professor X's teaching or work in community partnerships. However, I am familiar with her commitment to professional development. Last summer, Professor X moved to Mexico to learn new basket weaving techniques and improve her Spanish language skills. As a result, LBCC now offers sections of Meso-American basket weaving in both English and Spanish.

4. Any additional comments about the faculty member's performance?

The Library's exhibit of baskets by her Underwater Basketweaving students is always amazing. It is clear that she is talented in nurturing students' artistic expression.

Appendix D: Sample Reflection

Student evaluations over the past three years have shown that most students consider my classes above average. Student comments are very favorable especially regarding my lecture style and study guides. One area that students have expressed a concern in is that the material I lecture on isn't what they feel is necessarily what they are tested on. I plan to work to resolve this in the future by creating assessments and test questions directly related to the outcomes of the class and then to develop my lectures from this. Additionally, I would like to seek professional development in the area of creating assessments to learn different methods of assessing students rather than the traditional "paper and pencil" test.

Last year I created a flipped classroom environment for my Underwater Basket Weaving class and am continuing to use this model. Students were given readings, research, and assignments to complete individually outside of the classroom. As a group we met face-to-face four times throughout the term. During these face-to-face meetings, students demonstrated weaving techniques they have learned in the class as well as new techniques they have developed with the strategies and training they have received. Student test scores and those meeting the outcomes of the class have risen by 20% and 25% respectively. I am very pleased with the results of the pedagogical shift and will continue to incorporate new ideas and strategies such as this into my classes in the coming year.

During this appraisal period I have not had as much overall department responsibility as another member who has filled the role of department chair for us. My role has been to be supportive of this leadership and the model we have adopted for our department. I have helped to create schedules, courses, outcomes, and strategic initiatives to advance our department. My relationship with others in the department is excellent and we work very collaboratively within our department to continuously improve our programs. I have been a mentor to two new part-time faculty in our department and am available any time they have questions or concerns. We have had many conversations regarding what is and is not working in their classes, and I have offered suggestions on different ways to engage the students.

I have been engaged at LBCC by serving on the ACME Committee for almost 3 years, and I have chaired that committee for the past 2 years. I typically spend between 2 and 10 hours per week on this committee work. In addition I have been an early adopter, supporter, and innovator in the area of OER and have applied for and received two grants for OER materials development for my courses. My department currently has a higher percentage of required textbooks that are OER than any department on campus. The result has been increased student satisfaction and a smaller financial burden for all of them. I serve on the LBCC committee which is designated to control and implement standards and guidelines for the use of OER materials on our campus.

I am very involved with our department's advisory committees. I communicate with many of these committee members outside of our advisory committee meetings through phone calls, emails, and visits to their places of employment and make sure to connect with these community partners at least once per term. To be active in the programs of our department, advisory committee members must remain engaged in the program. I consider myself a form of cheerleader whose job it is to encourage that engagement.

During the school year, our local professional organization, YOU MAKE IT HAPPEN, meets monthly to provide for education as well as to conduct the business of the organization. Once each year, it is my job to provide this education. I generally attend all of these educational and business meetings. During this appraisal period I have served as the YOU MAKE IT HAPPEN president and was nominated for "Instructor of the Year" by the parent organization - WE ALL WORK TOGETHER. In addition, my Acme certification requires me to receive 12 hours of continuing education every year to maintain my certification. Also, every other year I attend the national convention and state convention of this organization.

Last but not least, I am currently enrolled in "Leadership LBCC" which is an educational opportunity for LBCC employees and is this year focused on the subject of diversity. I have very much enjoyed my days that have been spent in the Fireside Room with the rest of this year's cohort and have learned a great deal. What an excellent opportunity.

Appendix E: Sample Goal Setting

Appraisal Cycle Goals:

1. Work with the Oregon Association of Professional Basket Weavers to upgrade curriculum to meet the new weaving materials requirements.
2. Attend National Conference on Basket Weaving in next year.
3. Create partnership with Linn and Benton County cooperative Basket Weaving Associations to expand opportunities for internships (CWE) and employment.

Yearly Check In:

1. Current Workload review.

Department classwork/teaching load: 80%

Professional/Industry organizations: 10%

Department Chair load: 10%

2. New course/current course development.

Two current laboratory classes are being redesigned. These courses will be updated to meet industry standards and incorporate new laboratory equipment.

One new course is being developed. This new laboratory class is being proposed to bring student skills to a higher level. Currently working with industry representatives to focus both topics and skill sets for this class.

3. Professional Development plans.

Attend National Laboratory Conference.

Attend equipment supplier seminar covering the operation and maintenance of new equipment.

4. Planning for new materials, new equipment, other resources.

Identify new equipment needs for laboratory classes under development. Investigate alternatives for financing equipment purchase.

5. Additional Topics

Expansion of CWE opportunities for program students.

Appendix F

Faculty Roles

- **Teaching**

Responsible for subject matter mastery, curriculum development, instructional design and delivery, assessment of student learning, establishing a positive learning environment and completing related administrative requirements.

- **Learner Support and Development**

Activities which result in a student's personal, social, academic, or career-oriented growth. These may include, but are not limited to, program-related administrative tasks, instructional support, testing, retention/recruitment, consultation, counseling and special event coordination.

- **Advising**

Activities which provide consultation and direction to students regarding their academic and career planning. For Teaching Faculty, responsible for understanding program requirements in the faculty's field of instruction and other programs as mutually agreed upon by the individual faculty member and their dean. For Professional Faculty, responsible for understanding program requirements as assigned.

- **Communication, Collaboration and Professionalism**

Involvement with internal and external constituencies to improve the quality of teaching and learning and the work environment at the College. Responsible for demonstrating professional and collegial attitudes and abilities, as evidenced by participation in college activities - which may include committee and council assignments, department and division responsibilities, appropriate College inservice activities, and other professional duties relating to the assignment - which contribute to the growth and well-being of the department, division and College.

- **Community Partnerships**

Active in developing partnerships with individuals, groups and organizations outside the College. Activities may include the development and management of grants and contracts, provide leadership and management of joint activities, plan and implement coordinated services, plan and present workshops and serve on boards and job-related committees.

- **Professional Development**

Activities which contribute to the continuing development of content expertise, scholarship, skill, and/or professional behavior. These may include participation in short and long term professional organizations, and participation in College and program accreditation activities.

Values

- Opportunity
- Excellence
- Inclusiveness
- Learning
- Engagement

Strategic Goals

- Productivity: Increase Completion
- Equity: Completion for All
- Quality: Completion Leading to Better Lives

Core Themes

- Educational Attainment
- Economic Vitality
- Cultural Richness

Faculty Appraisal Summary

*Please note that emphasis should align with the faculty member's work plan.

Name:

Dept/Division:

ID#: X

Supervisor:

Appraisal period:

TEACHING

LEARNER SUPPORT AND DEVELOPMENT

COMMUNICATION, COLLABORATION, AND PROFESSIONALISM

PROFESSIONAL DEVELOPMENT

ADVISING

COMMUNITY PARTNERSHIPS

OVERALL SUMMARY AND IDEAS FOR THE FUTURE

This is to certify that this appraisal has been discussed with me. I understand that my signature does not necessarily indicate agreement and I can provide additional written comments if I so desire.

Faculty Signature

Date

Supervisor Signature

Date

Vice President or President

Date

Human Resources

Date



Management/Exempt and Confidential Staff Performance Review Process

Philosophy and Purpose

The Management/Exempt and Confidential performance review is focused on two primary goals:

1. Personal professional growth and development for the reviewee, and
2. Intentional goal setting/action planning in alignment with the college's strategic goals and objectives.

Note: Except to the extent that coaching or discipline shared within the review period is reflected, performance review is not a replacement for or a component of the performance management or disciplinary continuum as expressed in Board Policy 6040.

Components:

The review/goal setting and action plan process has only three (3) components:

1. A narrative performance self-review document to be completed by the reviewee.
2. A brief narrative summary performance review document to be completed by the reviewer, to cover the reporting period, highlighting strengths, accomplishments (including the successful completion of stated goals), opportunities for improvement, etc.
3. Goal setting and action plan documents to be completed for each of the reviewed employees' major goal areas. There is no prescribed number of goals to document here. This is to be determined collaboratively between the reviewer and the reviewed.

Frequency Schedule:

This process calls for annual reviews for all management/exempt and confidential employees regardless of their time of service.

The annual review schedule encourages more frequent and ongoing communication between manager and their direct report relative to overall performance and progress on annual goals. While the annual review is clearly not intended to be the only time that managers and their supervisor check-in with their staff to assess the state of work and progress on goals, it is

intended to keep both parties more frequently focused on collaborative work in sync with our mission, core themes and strategic goals.

Steps of Review Administration:

1. Review forms and goal setting/action plan forms are available online. Human Resources will send out a reminder in the spring that completed reviews are due to be received in Human Resources no later than July 31st of the current year.

2. At or about the time of this initial notice, the reviewer should ask the reviewee to complete and return the self-review form, and begin to gather other review data.

*Note: Helpful forms, such as the **Administrative Traits and Tally Forms** are available on the [HR Website](#) for any manager who chooses to employ them as part of their information gathering process. These forms, however, are not a required component of the review process.*

3. Once the self-review is received and other data gathered, the reviewer can draft the narrative review document, and schedule the review meeting.

4. Conduct the review meeting, finalize the draft review document collaboratively and return the completed form to Human Resources for retention in the personnel file.

Note: During this review meeting, you should begin a dialog about the goal setting and action planning process to follow.

5. Human Resources will send email notices to all managers at the beginning of August, reminding them that goal setting and action plan documents for the coming academic year (created in conjunction with and after the review interview), are due to be completed and sent to the appropriate vice president for review by September 1st.

6. Collaborate with the reviewee to complete goal setting and action planning forms. Managers and their direct reports should meet at regular intervals (at least quarterly) to check-in on progress toward goals. Goal setting and action plan forms are not submitted to HR, but retained by the reviewer and reviewee as reminder of their work over the course of the coming year.

Note: Performance reviews may be conducted outside of the prescribed schedule/timelines described in this document if, in the opinion of the supervisor, the circumstances warrant that such action be taken for the good of the employee or the college.

Records Retention

1. Human Resources will retain only the narrative performance review document in the employee personnel file.

2. Annual goal setting and action plan documents will be retained by the reviewer and the reviewed, and forwarded for review by the applicable Vice-President or President.

Linn-Benton Community College
Management / Confidential Staff
Performance Review

| | |
|------------------------|---------------------------------|
| Reviewed Employee Name | Position Title |
| Reviewer's Name | _____ to _____ Review Period |
| Review Discussion Date | |

Dear (Reviewed Employee):

To review this past year, I would like to offer a short narrative, to include a brief recap of both your work, and the progress/performance of your work group. It is my hope that this feedback, together with the dialogue that will ensue, will lay the foundation through which our work together will continue to be both effective and enjoyable. **(Example-Personalize)**

Summary Performance Review

(Include a brief narrative to include both positive feedback and feedback on “opportunities for improvement,” with specific examples to support each. Review performance related to annual goals, as well as both personal performance / behavior items and items associated with the performance of the work group that the employee leads/serves within.)

Direction(s) for this coming year.

(Set a “big picture,” leadership direction for items to focus on in coming year(s). In the employee’s Goal Setting and Action Plan document (below), you will collaborate with the employee to develop a responsible approach to achieving these goals. Think of this statement as the “why” behind the “what” and the “How” that will be articulated in the goal setting process)

Annual Goal Setting & Action Plan

On the date indicated below, we will get back together to collaborate on producing your goal setting and action plan. This plan will work to achieve two main purposes: 1) to advance your personal professional development, and 2) to assist in focusing our work group’s efforts, assuring alignment with the College’s mission, core themes and strategic goals.

At that same time we can also look together at your position description to assure that it is an accurate representation of your duties, moving forward. When completed, both products will be attached to this summary and retained in the record.

GSAP date

In closing, I just want to thank you for your service, and for the spirit in which you deliver it.
(Example-Personalize)

Sincerely,

(Reviewer's Printed Name)

(Reviewer's Position Title)

Linn-Benton Community College

Acknowledgement of Receipt: By signing below, I acknowledge receipt of the review document. I have also been apprised of my right to attach my own comments, if I so choose.

Employee Signature

Date



Dental Assistant - *Fall 2022*

PROGRAM OVERVIEW: The Dental Assistant program at Linn-Benton Community College provides students with theory, performance-based and expanded function skills, and clinical experience. Completion of LBCC's one-year Dental Assistant Program will provide you with a certificate in Dental Assisting. For more information go to <http://www.linnbenton.edu/dental-assistant>.

PROGRAM FORMAT: The four-term program accepts one class beginning each Fall Term. It is your responsibility to be informed and adhere to all requirements, procedures and deadlines as they may change from year to year. New applicants as well as applicants from previous years must complete the following application process.

ESTIMATED PROGRAM COST: \$10,000 (subject to change)

PROGRAM DATES: Fall Term 2022 through Summer Term 2023

MANDATORY APPLICATION INFORMATION SESSION: Follow this link to find additional instructions for requirement completion:

https://drive.google.com/file/d/118udwLM1qOk8uysbhdv_NjKL_cKCXUzz/view?usp=sharing

APPLICATION DATES: Online application opens: **May 9, 2022, 9:00 AM** ~ Still Accepting Applications ~

Application closes: **September 12, 2022** (subject to closing earlier if the cohort fills sooner)

APPLICATION DECISION: Application decision emails will begin to go out **during the week of June 6, 2022**

POST-ADMISSION REQUIREMENTS DEADLINE: **August 2022** (Date TBA; see last page)

CLASS SELECTION PROCESS: Applications are accepted on a first-come first-served basis with preference given to residents of the Linn-Benton Community College (LBCC) Tax District. It is your responsibility to be informed on and adhere to all requirements, procedures and deadlines as they may change from year to year. New applicants to LBCC as well as previously admitted LBCC students must complete the following application process.

Resident Priority will be first given to qualified applicants who are residents of the Linn-Benton Community College (LBCC) tax district followed by in-state, out-of-state and then international applicants between May 9 - 13, 2022. After these dates Resident Priority will no longer be considered. To determine whether or not you live at such an address (whether you rent or own), please refer to your property tax statement, or inquire at your county tax assessor's office. Some addresses at or near the Linn or Benton county lines, though inside the county lines, may not be within the LBCC District. **NOTE:** Not all student Visas allow students to claim USA permanent residential status and/or be admitted to this type of program. International students need to consult LBCC International Admissions to determine whether they are eligible to apply. For more information go to <http://www.linnbenton.edu/international-students>.

CANCELLATION: Sessions are subject to cancellation if a minimum number of eligible students are not admitted. Students must reapply for later sessions.

ADMISSION LIMITATIONS

Applicants should be aware of the following Admission Limitations; failure to comply may result in application denial:

- **PREVIOUSLY ADMITTED STUDENTS:** Applicants who have previously been admitted to this program are no longer eligible to apply if they exited the program based on safety concerns or if they exited the program two previous times based on unsuccessful attempts to pass academic and/or clinical requirements not directly related to safety (includes withdrawal in lieu of failing grades).
- **APPLICATION COMPLETION:** Applicants must submit proof of completing all Minimum Application Requirements by the deadlines given to be considered for admission to this program. Applicants are responsible for ensuring LBCC's Admission department has up-to-date transcripts and course information for transfer credits they want considered.
- **HOLDS*:** Applicants must have no registration Holds at LBCC during the entire application and admissions process to be considered for admission to this program.
- **ACADEMIC STANDING*:** Applicants' [Academic Standing](#) must be in Good Standing at LBCC during the entire application and admissions process to be considered for admission to this program.
- **STUDENT STATUS*:** Applicants must be in good Student Status with Student Services at LBCC during the entire application and admissions process to be considered for admission to this program.

* To view your Overall Academic Standing and Student Statuses at LBCC: 1) Log in to WebRunner through [Single Sign-On](#), 2) Select "Student," 3) Select "Student Profile," then 4) Select "Registration Notices" in the upper right corner of the page. Contact your LBCC advisor if you have questions about your status.

NOTE REGARDING FINANCIAL AID: The Federal Financial Aid standards and policies regarding Satisfactory Academic Progress (SAP) are not identical to the college's standards on admission/registration eligibility. Poor Financial Aid SAP status will not limit your potential admission into this program, but may severely affect your funding options. To view your current SAP status: 1) Log in to WebRunner, 2) Select "Financial Aid," 3) Select "Your Financial Aid Status," 4) Select "academic progress." To find out more about applying for Financial Aid through LBCC go to:

<https://www.linnbenton.edu/tuition-and-admission/financial-aid/>

CIVIL RIGHTS

Request for Special Needs or Accommodations

Direct questions about or requests for special needs or accommodations to the LBCC Director, Center for Accessibility Resources (CFAR), RCH-105, 6500 Pacific Blvd. SW, Albany, Oregon 97321, Phone [541-917-4789](tel:541-917-4789) or via Oregon Telecommunications Relay TTD at [1-800-735-2900](tel:1-800-735-2900) or [1-800-735-1232](tel:1-800-735-1232). Make sign language interpreting or real-time transcribing requests 2-4 weeks in advance. Make all other requests at least 72 hours prior to the event. LBCC will make every effort to honor requests. LBCC is an equal opportunity educator and employer.

LBCC Comprehensive Statement of Nondiscrimination

LBCC prohibits unlawful discrimination based on race, color, religion, ethnicity, use of native language, national origin, sex, sexual orientation, gender, gender identity, marital status, disability, veteran status, age, or any other status protected under applicable federal, state, or local laws. For further information see Board Policy 1015 in our [Board Policies and Administrative Rules](#), Title II, Title IX (employee cases), & Section 504: Scott Rolan, Director of Human Resource Development and Support, CC-108, 541-917-4425; Title IX (student cases): Jill Childress, Manager for Student Conduct and Retention, WH-215, 541-917-4806, LBCC, Albany, Oregon. If you feel you have been discriminated against in any interaction at Linn-Benton Community College, or have been harassed by another person while at LBCC, or wish to report any concern or complaint, please navigate to this page to make a report: linnbenton.edu/report-it. This and additional information can be found at <https://www.linnbenton.edu/about-lbcc/administration/policies/equal-opportunity.php>.

This and additional information can be found at

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2022 DENTAL ASSISTANT MINIMUM APPLICATION REQUIREMENTS

If you satisfy the minimum application requirements and do not have any other admission limitations, you will be considered a qualified applicant. Course numbers noted below refer to LBCC courses as described in the LBCC Catalog. Spring term enrollment will be accepted pending completion by June 18, 2022. Courses must be completed with a grade of “C” or higher at a regionally accredited institution. Official transcripts from original institutions are required for proof of transfer course completion. Transfer course equivalency is considered on a case by case basis and is not guaranteed.

| MINIMUM APPLICATION REQUIREMENTS: | |
|--|---|
| | MANDATORY APPLICATION INFORMATION SESSION See page 1 for the link to the online version of the Mandatory Information Session) <u>NOTE</u> : Submission of the online form is required following completion of session. |
| | CHECK FOR ADMISSION LIMITATIONS (see page 2) |
| | SUBMIT OFFICIAL TRANSCRIPTS from all non-LBCC institutions (www.linnbenton.edu/transcripts) <u>NOTE</u> : Unofficial transcripts will NOT be accepted to show proof of course completion. |
| | ONLINE APPLICATION (see page 4) |
| | ONLINE SUPPLEMENTAL INFORMATION FORM After completing the online application, a link to the Online Supplemental Information Form will be sent to applicants via email. Information regarding the following will be required to be provided within that form. <u>NOTE</u> : Applicants will be required to supply the following for the required course: course number, college or university where each course was completed, month and year course was completed, and the grade received. |
| | ➤ Residency (see page 5) |
| | ➤ Understanding and Compliance (see page 5) |
| | ➤ High School graduation or GED As part of the Online Supplemental Information Form completion, all applicants will be required to upload an electronic copy of their high school diploma, GED certificate or accredited equivalent. |
| | ➤ Minimum Application Requirement Courses |
| | CS 120 - Digital Literacy* |
| | MTH 050 – Number Sense & Critical Thinking** (completed since September 2017) |
| | WR 115 - Introduction to College Writing** |

* Successfully passing LBCC’s CS 120 Waiver Test PRIOR TO APPLYING TO THE PROGRAM may be used to meet the Digital Literacy requirement (www.linnbenton.edu/student-assessment).

** Successfully placing **above** this course via the LBCC Placement Tests (www.linnbenton.edu/student-assessment) PRIOR TO APPLYING TO THE PROGRAM may be used to meet the Minimum Application Requirement. “Self” Placement will not be considered in this application. Time restrictions still apply.

Application Questions

Lorraine Lara

Academic Planning Specialist

HealthcarePrograms@linnbenton.edu

When applying for the Dental Assistant Program, you are required to apply online. Applications will open online on May 9, 2022 at 9:00 am. Online applications receive an automatic time/date stamp. Early applications will not be considered. Resident Priority ends May 13, 2022 at midnight (see page 1). Application close date to be determined.

Online Application Instructions:

1. Go to <http://www.linnbenton.edu/apply>
2. Select “See Steps to Apply”
3. Select “High school graduates without some previous college credit”
- or - “High school graduates with some previous college credit”
4. Select “Create a WebRunner Account”
5. Select “Show Application Form”
6. Create your **Login ID**, your **PIN**, and verify your **PIN**
7. Select “Login”
8. Select the **Dental Assistant Program** from the Application Type drop down options (See **NOTE** below)
9. Select “Continue”
10. Select “Fall 2022” from the Admission Term drop down options
11. Enter at least your **first** and **last name** into the appropriate boxes
12. Select “Fill Out Application”
13. Complete all online application checklist items:
 - ✓ Name
 - ✓ Permanent Address
 - ✓ Personal Information¹
 - ✓ Mailing Address, if different from permanent
14. Select “Application is Complete”²

RETURNING/EXISTING LBCC STUDENTS: Log in to your WebRunner account, select the “Student” tab, select “Admissions”, select “Apply with an online application”, select “New” to create a new application, and then, *beginning at step 8*, follow the rest of the above online application steps. (See **NOTE** below)

NOTE: Selecting any other application type will prevent you from being able to proceed through this program’s application processes, thus may forfeit your admission consideration. If you are applying within the appropriate application dates but are unable to view this program on the Application Type drop down list, create a new application by starting at Step 1 (using a new Login ID and password). Be sure to select the appropriate program type from the drop down list. Do NOT select *A New Student* nor *Transfer Student*.

Remember: After completing the Online Application for Admission you will receive an email with a link to the Online Supplemental Information Form with a response deadline included. See pages 3 and 5 for additional information.

Tips: ¹ Date of Birth (DOB) and Social Security Numbers (SSN) are used, in part, to help ensure applications are not mismatched between LBCC applicants with the same names. During this step of the application process entry of DOB will be required and entry of SSN will be optional. Both may be required for other admission requirements.

² Once you submit your application a time/date stamp will be applied electronically. If additional information is needed to process your online application, you will be contacted by a staff member from the Admissions department. Failure to provide accurate information will result in your application being delayed and may result in it being denied.

RESIDENCY INFORMATION FOR SPECIAL ADMISSION PROGRAMS

For admission to limited enrollment programs, a resident is defined as someone who established permanent residency 90 days before the first day applications are accepted for that program. Permanent residency is defined as the home a person intends to return to after any absence, and in which one's dependents reside for an unlimited period of time. As part of the application process you will be required to submit information regarding your residency for the entire 90 day period leading up to the application. Information you will be required to provide includes legal name, phone number, LBCC student ID or Social Security Number, program of choice, street address, city, state, ZIP, and time period at the applicable address(es). You may be required to submit additional documentation upon request to show proof of your permanent residence. Misrepresentation of your permanent residence may result in forfeiture of your application status with this program. **NOTE:** Not all student Visas allow students to claim USA permanent residential status and/or be admitted to this program. International students need to consult International Admissions to see if they are eligible to apply. Go to <http://www.linnbenton.edu/international-students> for more information.

2022 STATEMENTS OF UNDERSTANDING AND COMPLIANCE

When applying to this program, you will be required to affirm that you understand all of the following:

- Dental Assistant Program is a technically challenging science based program of study.
- Students admitted to this program must be the age of 18 or older prior to the scheduled start date.
- LBCC's Student Right to Know information located at www.linnbenton.edu/student-rights
- Admission Limitations, Financial Aid's Satisfactory Academic Progress, and Student Civil Rights outlined on page 2.
- Applicants must comply with all application criteria and deadlines.
- Communication from LBCC regarding your program application will be sent to your LBCC email account. If you do not yet have an LBCC email, LBCC will send information via your personal email until an LBCC email has been assigned.
- Some occupational health hazards in this program include the wearing of latex gloves and masks, and working conditions which can intensify Carpal Tunnel Syndrome. Meet with the Dental Assistant advisor if you have any skin, breathing or other risk factors to consider.
- If you have a communicable disease which may be transmitted under normal Dental Assistant activities, you will be required to have documentation of completing medical treatment prior to participating in clinical/lab assignments.
- Admitted students will be required to complete all LBCC admissions processes and graduation requirements.
- Admitted students will be required to pay for and complete the LBCC approved criminal background check. The results will determine, in part, your eligibility to remain in the program but will not guarantee your eligibility to be licensed or employed in this career field. Neither previously completed nor alternative background checks will suffice.
- Eligibility to take the national Dental Assistant National Board (DANB) exams may be restricted if you have been convicted of, or pled guilty or no contest to, a felony or any crime punishable by confinement in a state or federal prison for any length of time. Contact DANB as soon as possible to receive more information on their criminal background requirements and processes (1-800-FOR-DANB). If applicable, admitted students will be required to confirm contact with DANB prior to starting the program.
- Admitted students will have their social security number (SSN) matched against the US Department of Health & Human Services list of individuals who are barred from any participation in federally funded health programs. If on the list, you will not be eligible to participate in this program.
- Admitted students may be required to clear a program approved drug test as a condition for continued admission in this program.
- Admitted students will be required to pay for, submit proof of, and keep current all post-admission requirements, including immunizations, medical screens, and CPR certification as per the criteria and deadlines which will be specified in the admission materials.
- Admitted students will be required to submit proof of being fully vaccinated for COVID-19 as one of the post-admission requirements. "Fully vaccinated" means two weeks post vaccination completion. Completion deadline to be determined. At this time, exemptions are not being considered by our clinical partner healthcare sites for students who will have direct patient contact.
- Admitted students will be required to maintain a minimum "C" grade in each certificate required course, and courses must be taken in the specified sequence.

POST-ADMISSION REQUIREMENTS

Please do not turn in proof of the items listed below with your application packet. Only students who are admitted to this program will be required to complete all Post-Admission Requirements. Additional instructions will be provided with the admission offer emails. The estimated costs of the following are NOT included in the program's tuition and fees. The following are subject to change:

- **SPRING TERM COMPLETION:** If applicable, submit proof of Spring term minimum application course completion with a "C" grade or better. If completed at another institution, submit an official transcript
- **REGISTRATION:** Students will be required to register for and complete with a grade of "C" or higher COMM 111 (Fall term 2022 or sooner) and MTH 075 (Winter term 2023 or sooner)
- **INFORMATION RELEASE:** All admitted students will be required to complete and submit an Information Release form
- **CRIMINAL BACKGROUND CHECK:** All admitted students will be required to complete and pass the LBCC approved criminal background check to remain eligible for this program (estimated cost: \$66)
- **HEALTH AND TRAINING DOCUMENTATION:** Electronically submit the appropriate immunization, medical screening, CPR and First Aid documentation (estimated review and tracking cost is \$43; cost of immunizations, medical screenings, CPR and First Aid certifications vary).
 - **Positive Hepatitis B surface antibody titer*** – blood test; vaccinations alone will not meet the criteria
NOTE: Early action on this item is necessary. Completion of the required vaccines and required antibody test can take 6-8 months to complete. It is recommended to have official proof of your entire HepB vaccine series completion prior to applying to this program. Proof of the entire HepB vaccine series AND the follow-up HepB Surface Antibody Titer will be required by July 2022. In the event of a NON-positive Antibody Titer proof of the original vaccine series, proof of the NON-positive titer, AND new HepB vaccines must be submitted by August 2022. Additional documentation may be required.
 - **MMR (Measles, Mumps, Rubella)*** – positive antibody titers for all three components or 2 vaccines
 - **COVID-19*** – proof of being fully vaccinated; documentation must include the vaccine manufacturer(s)
 - **Negative Tuberculosis (TB) test*** – Either a Negative TB Blood Test (Quantiferon Gold or T-Spot) or Negative 2-Step TB Test (involves 2 separate Negative TB skin tests completed 1-3 weeks apart); must have been completed within the last 12 months and kept current while in the program
 - **CPR** – ONLY American Heart Association's BLS for healthcare providers or American Red Cross' Professional Rescuer certifications (with the in-person skills test) will be accepted. Other certifications will be denied. Certification must contain an in-person test component and be kept current.
 - **First Aid** - training must contain an in-person test component; certifications must be kept current.
- **MANDATORY MEETING:** All admitted students will be required to attend the July Mandatory Meeting
- **ADMISSION FEE:** Students who have never paid the admission fee will be required to prior to program start
- **ADDITIONAL COSTS:** Admitted students will receive additional details. Student costs may include the completion of a N-95 mask Fit screen/test through an Occupational Medicine facility (est. cost: \$70 - \$275) and the purchase of field specific student liability insurance (costs vary).

RECOMMENDED IMMUNIZATIONS: The following immunizations are recommended. Some clinical sites in Oregon require one or more of these immunizations for clinical placement acceptance, thus not completing these might result in fewer clinical placement options while in the program. (costs vary)

- **Influenza (flu)*** – Current flu vaccine & updated annually
- **Polio*** – positive antibody titers or 3 doses
- **Tdap (Tetanus, Diphtheria and Pertussis)*** – 1 dose within the last 10 years and updated every 10 years
- **Varicella (Chicken Pox)*** – positive antibody titer or 2 doses

* Documentation must be either a copy of an official immunization card or original immunization/medical screening document. Documentation must include: 1) Your name, 2) Date of Birth, 3) Name of administering Agency or provider, 4) Name of injection, test, etc., and results, if applicable, 5) Date of injection, test, etc., 6) Healthcare Provider's signature, official stamp or letterhead.

Diagnostic Imaging - Summer 2022

PROGRAM OVERVIEW: The purpose of this program is to prepare students to practice as proficient, multi-skilled professionals in culturally diverse health care settings, to demonstrate outcomes required by the American Registry of Radiologic Technologists (ARRT) and program guidelines and to prepare students for application and completion of ARRT certification examinations. Upon completion of the program and the general education requirements students will be eligible to apply for an Associate of Applied Science degree. Please note: Diagnostic Imaging is a program of the Radiologic Sciences.

PROGRAM FORMAT: Students attend classes approximately 40 hours a week. The program does not follow the traditional college terms. Classes are conducted in real time using a “Virtual Classroom” and a robust online course management system. Lab experiences will take place at the Lebanon lab and/or local healthcare facilities (for specific distance education students). Currently the program has distance labs located in the BMCC, COCC, Clatsop CC, and TVCC areas. Individuals applying to one of the aforementioned Distance Education (DE) areas should reside in the associated Community College district prior to application and should expect to make a *minimum* of 7 to 9 trips to the LBCC campus in Lebanon, Oregon during the course of the program. All other applicants should expect to be in Lebanon, Oregon a minimum of 3 to 4 times per week during the first three terms of the program. Once enrolled in the Diagnostic Imaging Program, students are LBCC students and are supported by LBCC.

ESTIMATED PROGRAM COST: \$23,743.08 (subject to increase; see last page)

PROGRAM DATES: June 2022 through March 2024

PRE-APPLICATION INFORMATION SESSION: Review this recorded lecture (<https://youtu.be/1NDU631hSwc>) fully, then complete the information session acknowledgement form <https://forms.gle/4daSBRFRUF3PWxhN7>.

APPLICATION DATES: Online application opens: **January 3, 2022, midnight**

Online application deadline: **January 14, 2022, midnight**

POINTS EMAIL: Scheduled to be sent via email **by the week of February 7, 2022**

MULTIPLE MINI-INTERVIEW: February 25, 2022 (See Admission Interview info below)

APPLICATION DECISION: Scheduled to be sent via email by the week of **March 14, 2022**

CLASS SELECTION PROCESS: Admission to the program is based first on residency then the point system, and NOT on a first-come, first-served basis. Resident Priority is given to in-state, out-of-state, then international applicants respectively. In the event of a tie the selection process will be based as follows: (a) number of points for documented work experience, (b) number of points for Anatomy & Physiology, then (c) accumulative GPA for complete Anatomy & Physiology series. Only qualified applicants will have their points evaluated. It is your responsibility to be informed on and adhere to all requirements, procedures and deadlines as they may change from year to year. The program is subject to cancellation if there is an insufficient number of clinical sites or eligible students. Students admitted to a canceled session must reapply when the program is offered again.

ADMISSION INTERVIEW: 18 points possible. The top ranked qualified Traditional LBCC applicants will go through a mandatory Multiple Mini-Interview (MMI) during which they will rotate through three separate interview stations, answering 1 question at each station. Qualified applicants will be ranked based first on residency then on points (see page 3 for other points categories). Distance Education (DE) applicants will be notified via email of their specific MMI time/date if applicable. See page 5 for the list of DE cohort areas.

NOTE: Although job shadows are not required and do not apply toward points, the program faculty strongly encourage completing a job shadow prior to applying. Additional information located at: (linnbenton.edu/diagnostic-imaging).

ADMISSION LIMITATIONS

Applicants should be aware of the following Admission Limitations; failure to comply may result in application denial:

- **APPLICATION COMPLETION:** Applicants must submit proof of completing all Minimum Application Requirements by the deadlines given to be considered for admission to this program. Applicants are responsible for ensuring LBCC's Admission department has up-to-date transcripts and course information for transfer credits they want considered.
- **HOLDS*:** Applicants must have no registration Holds at LBCC during the entire application and admissions process to be considered for admission to this program.
- **ACADEMIC STANDING*:** Applicants' [Academic Standing](#) must be in Good Standing at LBCC during the entire application and admissions process to be considered for admission to this program.
- **STUDENT STATUS*:** Applicants must be in good Student Status with Student Services at LBCC during the entire application and admissions process to be considered for admission to this program.

* To view your Overall Academic Standing and Student Statuses at LBCC: 1) Log in to WebRunner through [Single Sign-On](#), 2) Select "Student," 3) Select "Student Profile," then 4) Select "Registration Notices" in the upper right corner of the page. Contact your LBCC advisor if you have questions about your status.

NOTE REGARDING FINANCIAL AID: The Federal Financial Aid standards and policies regarding Satisfactory Academic Progress (SAP) are not identical to the college's standards on admission/registration eligibility. Poor Financial Aid SAP status will not limit your potential admission into this program, but may severely affect your funding options. To view your current SAP status: 1) Log in to WebRunner, 2) Select "Financial Aid," 3) Select "Your Financial Aid Status," 4) Select the Aid Year. To find out more about applying for Financial Aid through LBCC go to: <https://www.linnbenton.edu/tuition-and-admission/financial-aid/>

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This and additional information can be found at
<https://www.linnbenton.edu/about-lbcc/administration/policies/equal-opportunity.php>

2022 APPLICATION CHECKLIST

If you satisfy the minimum application requirements and do not have any other admission limitations, you will be considered a qualified applicant. Course credits must be completed with a grade of "C" or higher at a regionally accredited institution prior to the application deadline. Course numbers noted below refer to LBCC courses as described in the LBCC Catalog. Official transcripts from original institutions are required for proof of transfer course completion. Transfer course equivalency is considered on a case by case basis and is not guaranteed. Applicants will be required to supply the following for each course they want considered: course number, institution where each course was completed, month and year of completion, and the grade received.

| | |
|---|-------------------|
| PRE-APPLICATION INFORMATION SESSION (<i>see page 1</i>) Must have been completed within last 3 years. | |
| CHECK FOR ADMISSION LIMITATIONS (<i>see page 2</i>) | |
| SUBMIT OFFICIAL TRANSCRIPTS for all transfer courses <i>by January 14, 2022</i> (linnbenton.edu/transcripts) | |
| ONLINE APPLICATION (<i>see page 4</i>) <i>Neither early nor late applications will be accepted.</i> | |
| ONLINE SUPPLEMENTAL INFORMATION FORM After completing the online application, a link to the Online Supplemental Information Form will be sent via email within 3 business days. Information regarding the following must be provided in the form. | |
| ➤ Residency & Cohort Selection (<i>see page 5</i>) | |
| ➤ Understanding and Compliance (<i>see page 6</i>) | |
| ➤ Minimum Application Requirement Courses* | |
| WR 121 – English Composition | |
| MTH 111 – College Algebra math credits (completed since June 2017)** | |
| Medical Terminology 1 <u>or</u> pass the LBCC Challenge Exam (CRS 131, AH 111, CMA 101 <u>or</u> MO. 630 accepted) | |
| BI 231 – Anatomy & Physiology 1 | |
| Communications *** (COMM 218 is recommended) | |
| Human Relations course *** (a course from the Humanities points category below will be accepted) | |
| ➤ Support Courses for Points (only one course per points category will be considered) | |
| BI 232 - Anatomy & Physiology II (strongly recommended) | 2 points |
| BI 233 - Anatomy & Physiology III (strongly recommended) | 2 points |
| Biology with Lab | 1 point |
| Chemistry with Lab | 1 point |
| Physics with Lab | 1 point |
| Humanities (only: HST 201, 202 or 203; or HUM 101, 102 or 103; or R 101, 102, 103, or 202; or SOC 204, 205, 206 or 222; or WS 280) | 1 point |
| General Science with Lab (only: GS 104, GS 105, or GS 106) | 1 point |
| Digital Literacy (only: CS 120 or CIS 125) | 1 point |
| General Psychology (only: PSY 201, PSY 202, or PSY 203) | 1 point |
| College Level Career Exploration Course (2+ credits of multi-career exploration) | 1 point |
| ➤ Alternate Points for 2021 DI Alternates who were not previously admitted to the program | 2 points |
| ➤ Work Experience Form Submission , if applicable (<i>see page 7</i>) | 4-9 points |

NOTE: Some of the above courses (ex: BI231) may first require completion of one or more prerequisites. See LBCC's catalog (linnbenton.edu/catalog) for additional information regarding course prerequisites.

* Students admitted to this program will be required to meet the Diagnostic Imaging degree requirements as outlined in the 2022-23 LBCC catalog which might not match the above minimum application requirement courses list.

** IF your math credits are at or above the required skill level but older than 5 years, an [LBCC Math Placement Test](#) into or above MTH 112 within the last 5 years and achieved PRIOR TO APPLYING TO THIS PROGRAM may be used in addition to the older math credits. Math placement tests alone will not be accepted.

*** For a list of acceptable courses see [LBCC's 2021-22 Associates of Applied Science in Diagnostic Imaging](#).

ONLINE APPLICATION INFORMATION

When applying for the Diagnostic Imaging Program you are required to apply online. Applications will open online on January 3, 2022 at midnight. The deadline is January 14, 2022 at midnight. Online applications will receive an automatic time/date stamp once submitted. Neither early nor late applications will be considered.

Online Application Instructions:

1. Go to <http://www.linnbenton.edu/apply>
2. Select **"See Steps to Apply"**
3. Select **"High school graduates without some previous college credit"**
- or - **"High school graduates with some previous college credit"**
4. Select **"Create a WebRunner Account"**
5. Select **"Show Application Form"**
6. Create your **Login ID**, your **PIN**, and verify your **PIN**
7. Select **"Login"**
8. Select the **Diagnostic Imaging Program** from the Application Type drop down options (See **NOTE** below)
9. Select **"Continue"**
10. Select **"Summer 2022"** from the Admission Term drop down options
11. Enter at least your **first** and **last name** into the appropriate boxes
12. Select **"Fill Out Application"**
13. Complete all online application checklist items:
 - ✓ Name
 - ✓ Permanent Address
 - ✓ Personal Information¹
 - ✓ Mailing Address, if different from permanent
14. Select **"Application is Complete"**²

RETURNING/EXISTING LBCC STUDENTS: Log in to your WebRunner account, select the **"Student"** tab, select **"Admissions"**, select **"Apply with an online application"**, select **"New"** to create a new application, and then, *beginning at step 8*, follow the rest of the above online application steps. (See **NOTE** below)

NOTE: Selecting any other application type will prevent you from being able to complete the application process, thus may forfeit your admission consideration for this program. If you are applying within the appropriate application dates but are unable to view this program on the Application Type drop down list, create a new application by starting at Step 1 (using a new Login ID and password). Be sure to select the appropriate program from the drop down list and not to select *A New Student* nor *Transfer Student*.

Remember: After completing the Online Application for Admission you will receive an email within 3 business days with a link to the Online Supplemental Information Form with a response deadline included. See pages 3, 5 and 6 for additional information.

Tips: ¹ Date of Birth (DOB) and Social Security Numbers (SSN) are used, in part, to help ensure applications are not mismatched between LBCC applicants with the same names. During this step of the application process entry of DOB will be required and entry of SSN will be optional. Both may be required for other admission requirements.

² Once you submit your application a time/date stamp will be applied electronically. If additional information is needed to process your online application, you will be contacted by a staff member from the Admissions department. Failure to provide accurate information will result in your application being delayed and may result in it being denied.

RESIDENCY INFORMATION FOR SPECIAL ADMISSION PROGRAMS

For admission to special programs, a resident is defined as someone who established permanent residency 90 days before the first day applications are accepted for that program. Permanent residency is defined as the home a person intends to return to after any absence, and in which one's dependents reside for an unlimited period of time. As part of the Online Supplemental Information Form you will be required to submit information regarding your residency for the entire 90 day period leading up to the application. Information you will be required to provide includes legal name, phone number, LBCC student ID or Social Security Number, program of choice, street address, city, state, ZIP, and time period at the applicable address(es). You may be required to submit additional documentation upon request to show proof of your permanent residence. Misrepresentation of your permanent residence may result in forfeiture of your application status with this program. **NOTE:** Not all student Visas allow students to claim USA permanent residential status and/or be admitted to this program. International students need to consult International Admissions to see if they are eligible to apply. Go to <http://www.linnbenton.edu/international-students> for more information.

2022 DIAGNOSTIC IMAGING - PARTICIPATING AREA CONTACTS

Applicants are only allowed to select ONE of the following participating college cohorts on their application. For application questions please contact the application advisor listed under the partner college area toward which you plan to apply. All applicants are required to adhere to the application steps and criteria outlined in this bulletin.

Currently the program has distance labs located in the BMCC, COCC, Clatsop CC, and TVCC areas. Individuals applying to one of the aforementioned Distance Education (DE) areas should reside in the associated Community College district prior to application and should expect to make a *minimum* of 7 to 9 trips to the LBCC campus in Lebanon, Oregon during the course of the program. All other applicants should expect to be in Lebanon, Oregon a minimum of 3 to 4 times per week during the first three terms of the program.

TRADITIONAL LBCC APPLICANTS

Academic Planning Specialist: Lorraine Lara
HealthcarePrograms@linnbenton.edu
541-917-4923

CENTRAL OREGON COMMUNITY COLLEGE

Advisor: Diana Kalanquin
dlkalanquin@cocc.edu
541-383-7286

COLUMBIA GORGE COMMUNITY COLLEGE

Lorraine Lara, LBCC
HealthcarePrograms@linnbenton.edu
541-917-4923

OREGON COAST COMMUNITY COLLEGE

Advisor: Carol Martin
carol.martin@oregoncoast.edu
541-867-8521

TILLAMOOK BAY COMMUNITY COLLEGE

Advisor: John Sousa
johnsousa@tillamookbaycc.edu
503-842-8222

BLUE MOUNTAIN COMMUNITY COLLEGE

Advisor: Bryant Cardenas
bcardenas@bluecc.edu
541-278-5932

CLATSOP COMMUNITY COLLEGE

Advisor: Cole Evans
cevans@clatsopcc.edu
503-338-7679

LANE COMMUNITY COLLEGE @ FLORENCE

Lorraine Lara, LBCC
HealthcarePrograms@linnbenton.edu
541-917-4923

SW OREGON COMMUNITY COLLEGE

Advisor: Patrick Platt
pplatt@socc.edu
541-888-7298

TREASURE VALLEY COMMUNITY COLLEGE

Lorraine Lara, LBCC
HealthcarePrograms@linnbenton.edu
541-917-4923

2022 STATEMENTS OF UNDERSTANDING AND COMPLIANCE

When applying to this program, you will be required to affirm that you understand all of the following:

- **Prior to becoming a registered technologist the American Registry of Radiologic Technologists (ARRT) requires all registry applicants to have a Social Security Number (SSN).** Questions should be directed to ARRT at 651-687-0048.
- Students admitted to this program must be the age of 18 or older prior to the scheduled start date.
- LBCC's Student Right to Know information located at www.linnbenton.edu/student-rights
- Admission Limitations, Financial Aid Satisfactory Academic Progress, and Student Civil Rights outlined on page 2
- Applicants must comply with all application criteria and deadlines as outlined in this bulletin.
- Applicants may only apply toward one partner college area cohort (see page 5)
- Communication from LBCC regarding your program application will be sent to your LBCC email account. If you do not yet have an LBCC email, LBCC will send information via your personal email until an LBCC email has been assigned.
- Some occupational health hazards in this program include heavy lifting, exposure to bodily fluids and the use of latex gloves and masks. Meet with the Diagnostic Imaging Program Director if you feel you have any risk factors to consider.
- If you are suspected of or known to have a communicable disease which may be transmitted under normal Diagnostic Imaging activities, you will be required to have documentation of completing medical treatment prior to participating in clinical/lab assignments.
- Admitted students will be required to meet all the physical requirements for imaging students and technologists: <https://tinyurl.com/8askz6uv>
- Admitted students will be required to complete all LBCC admissions processes and graduation requirements.
- Admitted students will be responsible to gain and maintain all of the Diagnostic Imaging Technical Requirements to successfully complete this training.
- Admitted students will be required to pay for, submit proof of, and keep current Professional Liability Insurance as a "Radiologic Tech Student". Information will be provided to admitted students.
- Admitted students will be required to complete and pass all post-admission requirements by the deadlines specified in the admission materials.
- Admitted students will be required to pay for and complete the LBCC approved criminal background check. The results will determine, in part, eligibility to remain in the program but will not guarantee eligibility to be licensed or employed in this career field. Neither previously completed nor alternative criminal background checks will suffice.
- If you have ever been *charged with or convicted* in court of a misdemeanor or felony (including conviction of a similar offense in a military court-martial), your eligibility for registration by the American Registry of Radiologic Technologists (ARRT) following graduation may be restricted. Admitted students to whom any of the above applies will be required to submit proof of clearing the American Registry of Radiologic Technologist (ARRT) Ethics Review Pre-Application IN ADDITION TO the LBCC approved criminal background check. For additional ethics review info call 651-687-0048.
- If admitted, your social security number (SSN) will be matched against the US Department of Health & Human Services list of individuals who are barred from any participation in federally funded health programs. If on the list, you will not be eligible to participate in this program.
- If admitted, you will be required to cooperate with the drug testing policies of the program as well as any clinical experience or cooperative teaching site as a condition for continued enrollment in the course and/or related academic program. You may also be required to comply with a non-LBCC site's policy. Testing may be random and unannounced or conducted when there is reasonable suspicion that performance and/or behavior may be the result of the presence of a drug. The presence, as determined by the program approved test procedures, of prescription or non-prescription drugs, controlled substances or cannabis may result in immediate dismissal from the work site and disenrollment from the course and related academic program. You may also be subject to appropriate disciplinary action for violating the Standards of Conduct as noted in LBCC's Students Rights and Responsibilities.
- If admitted, you will be required to pay for, submit proof of, and keep current the required immunizations, medical screens, and CPR certification as per the criteria and deadlines which will be specified in the admission materials.
- Admitted students will be required to submit proof of being fully vaccinated for COVID-19 as one of the post-admission requirements. At this time, exemptions are not being considered by our clinical partner healthcare sites for students who will have direct patient contact.
- If admitted, you will be required to maintain a minimum of 75% which is considered a "C" grade in each degree required course, and courses must be taken in the specified sequence.

WORK EXPERIENCE VERIFICATION FORM

You may receive points for showing proof of **75 hours or more of direct patient work experience** within the last 5 years (does not include in-home health care). Work experience may only be verified using this form and the lower portion must be completed by the Supervisor or Human Resources representative of the facility in which you received your work experience. You may duplicate this form as needed to show proof of the minimum hours, but only ONE Work Experience Category will be considered toward points. Incomplete forms will not be considered for points. To submit this form, an electronic copy may be uploaded during submission of the Online Supplemental Information Form (see page 3).

Dear Supervisor/Human Resources,

I am in the process of applying to the Diagnostic Imaging Program offered through Linn-Benton Community College. The points process requests verification of applicable paid work experience in a patient care setting for a minimum 75 hours within the last 5 years (may be from more than one location).

I, _____ (program applicant’s name), authorize the college to contact the individuals listed on this form to verify the information provided.

Applicant’s Signature: _____ **Date:** _____

- - - - The portion below is to be completed by your Supervisor/Human Resources Representative - - - -

A. Work Experience Category: (Select one)

___ **Certification in a certified health care field (4 pts)** (ie: CNA, CMA, EMT, etc.)

- Minimum hours don’t apply in this category
- Training must have included internship/externship hours
- Must submit proof of certification/license with this form

___ **Combination of Volunteer and Paid Employment (4 pts)** (volunteer hours alone will not suffice)

___ **Paid Employment (5 pts)**

___ **Paid Employment in a certified health care field (8 pts)** (ie: CNA, CMA, EMT, etc.)

- Must submit proof of certification/license with this form.

___ **Paid Employment in a Diagnostic Imaging Facility (9 pts)**

B. Applicant’s Position Title: _____

C. Description of Duties: _____

D. Dates of Service: _____ **Total Paid hours:** _____
mm/dd/yy - mm/dd/yy and/or

Total Volunteer hours: _____

E. Name of Facility: _____ **Phone:** _____

Facility Address: _____

F. Site Representative’s Name: _____ **Title:** _____

Contact Email: _____

Site Representative's Signature: _____ **Date:** _____

DIAGNOSTIC IMAGING PROGRAM TECHNICAL REQUIREMENTS

Linn-Benton Community College offers both a “hybrid” instructional program and a “distance education” program for Diagnostic Imaging. Using a combination of clinical instruction, online courses in LBCC’s eLearning System and the synchronous virtual classroom environment, both traditional and distance education students can receive dynamic instruction to help them achieve their learning goals. ALL students in the Diagnostic Imaging Program must meet all technical requirements to successfully complete the program.

SKILLS NEEDED TO BE A SUCCESSFUL DIAGNOSTIC IMAGING LEARNER:

This is both an asynchronous and synchronous (real time) training environment. ALL students will log into their computers at program designated times via their webcam and their home internet into a “virtual classroom” in which the instructor provides a live lecture in real time. Lectures WILL NOT be recorded, so attendance is mandatory. Homework, assignments, and online resources will be available via the course management system. Mandatory labs for various courses will be scheduled throughout the term. For learning to occur, learners must actively participate in the training experience and will be responsible for completing the designated activities/ assignments within the prescribed timelines.

Travel to LBCC’s Healthcare Occupations Center in Lebanon, will be required of all students in this program. During the first 3 terms of the program, courses will be offered in a hybrid instructional manner: live, virtual face-to-face instruction with additional online resources and mandatory lab attendance. This education is provided in a variety of learning technologies which include streamed video and audio, email, web-conferencing, video conferencing, and virtual classroom.

Currently the program has distance labs located in the BMCC, COCC, Clatsop CC, and TVCC areas. Individuals applying to one of the aforementioned Distance Education (DE) areas should reside in the associated community college tax district prior to application and should expect to make a *minimum* of 7 to 9 trips to the LBCC campus in Lebanon, Oregon during the course of the program. All other applicants should expect to be in Lebanon, Oregon a minimum of 3 to 4 times per week during the first three terms of the program. Days in Lebanon require attendance for labs, hands-on instruction, lab practice time, and exams.

Course lectures and labs are delivered via a web based conferencing platform accessed through the Learning Management System. **Positioning lab** instruction includes demonstration of skills and experiments related to course content. Students will complete a portion of the lab exercises and practice (approximately 8 hours/week) in the hospital setting working with a clinic staff mentor/preceptor and/or at the Lebanon lab.

Clinical education provides the students with hands-on application of theory and demonstration of skills from all instructional methods. Students will complete program specific competencies in the clinical setting.

Web-based instruction is offered via a web browser, an email account, and the use of LBCC's eLearning System. Interaction with the instructor and classmates is through the forum, internet, email, virtual classroom, and web or phone conferencing. Students need to have high speed internet services available in their homes. Listed below are the requirements and skills necessary for web-based instruction.

LEARNERS MUST COMPLETE A VARIETY OF ACTIVITIES:

- Read and view information resources online
- Participate in the class discussion questions using the online forum
- Interact with fellow learners and the instructor in a respectful manner
- Complete exercises and homework as assigned by the designated due date
- Participate equally in the completion of team projects
- Take quizzes and tests online
- Attend and participate in live lecture in real time via the virtual classroom

TO BE ABLE TO PARTICIPATE AS AN ACTIVE LEARNER, YOU MUST MEET THESE TECHNICAL PREREQUISITES:

- Basic familiarity with computers and the web environment
- Access to reliable DSL or broadband / high speed internet via your own Internet Service Provider (ISP). You need an ISP that seldom times out or drops your connection.
- Have multiple web browsers. Specifics will be provided upon admittance. (Example: Chrome and FireFox)
- Ability to read and print online documents
- Ability to type responses and to post to the online learning environment
- Allocation for the time required to complete the online activities of this program
- Have access to and be skilled in the use of Microsoft Word and PowerPoint
- Ability to attach and email Word documents
- Ability to use other applications in the Microsoft Office Suite is desirable
- Access to a web camera and headset with microphone

TO ACCESS THE PROGRAM EARNING SYSTEMS YOU MUST HAVE ACCESS TO THE FOLLOWING EQUIPMENT:

Basic familiarity with the following prior to joining the program is also strongly encouraged.

Internet Access/Software:

- **High Speed Internet** – LBCC does not provide home internet access.
- **Email** – Admitted students are required to utilize their LBCC Email accounts linnbenton.edu/lbcc-email
- **Web Browser** – Firefox is recommended though Internet Explorer, Safari, Chrome, and other browsers may be used. Browsers must be kept updated. Pop-up windows, ActiveX and cookies must be enabled. If applicable, firewall settings must allow access to LBCC's eLearning Systems.
- **Adobe Acrobat Reader** (pdf files) – updated
- **Google Apps** – To edit and view documents from any computer, tablet, or smartphone

Computer Hardware:

- **Computer** – Equipped with Windows 8 or higher or a Macintosh running System OS X 10.6 or higher
- **Processor** – Recommended: Pentium dual-core (Windows) or Mac (G5 or Intel); 1 GHz or better
- **Screen Resolution** – Minimum of 800 x 600 @ thousands of colors
- **Memory** - Minimum of 128 MB of RAM; 256 is better, 512 or greater would be best
- **Hard Drive Space** – Enough to store files on your computer as needed
- **Modem** – Access to high speed internet is required. Drops in connections may require reconnecting to an online course. Time outs after four hours of inactivity is standard. If you experience frequent drops in service, check with your ISP for solutions.
- **Webcam and Headset with Microphone** – You will need a webcam and separate headset with microphone to participate in the virtual classroom.
- **16 GB Flash Drive**

COMMON INTERNET BROWSER PLUG-INS: Some classes may contain files which require one of the following:

- **Adobe Acrobat Reader** (pdf files)
- **Microsoft Word Viewer** (doc, docx files)
- **Microsoft Excel Viewer** (xls, xlsx files)
- **Microsoft PowerPoint Viewer** (ppt files)
- **Quicktime** (mov files)
- **Windows Media Player 10 or higher** (wma, mp3 & mp4 files)
- **RealAudio RealPlayer** (rp, mp3 files)
- **Java ***

* In some cases you may be prompted to download a plug-in for Java Runtime. This is normal.

NOTE: Despite meeting all technical recommendations you may still encounter difficulty accessing course content from your computer. It is required to locate an alternate computer to use and have a plan for backup technical support in case you encounter difficulties which cannot be resolved with your instructor and LBCC Support Services. **Personal computer problems will not excuse completing coursework on time.**

POST-ADMISSION REQUIREMENTS

Do NOT turn in proof of the items listed below with your program application. Only students who are selected for admission to this program will be required to complete all Post-Admission Requirements. Additional instructions will be provided with the admission offer emails. The estimated costs of the following are not included in the cost of program tuition and fees. The following are subject to change:

- **DEPOSIT:** A non-refundable tuition deposit of \$2,500 (subject to increase) will be due in May 2022
 - **MANDATORY ORIENTATION:** June 2022 in Lebanon, Oregon (date TBA)
 - **INFORMATION RELEASE:** Instructions will be provided to admitted students with the admission materials
 - **PROFESSIONAL LIABILITY INSURANCE:** Admitted students will receive additional details
 - **CRIMINAL BACKGROUND CHECK:** Passing the LBCC approved criminal background check will be required (estimated cost is \$66). NOTE: Admitted students who have ever been *charged with or convicted* in court of a misdemeanor or felony (including conviction of a similar offense in a military court) will be required to submit proof of clearing the [American Registry of Radiologic Technologist \(ARRT\) Ethics Review Pre-Application](#) in addition to the LBCC approved criminal background check. (Estimated cost is \$100)
 - **HEALTH AND TRAINING DOCUMENTATION:** Electronic submission of appropriate health and training documentation will be required (estimated review and tracking cost is \$43; health and training costs vary)
 - **Positive Hepatitis B surface antibody titer*** – blood test; vaccinations alone do NOT meet this criteria
NOTE: EARLY ACTION ON THIS ITEM IS REQUIRED. COMPLETION OF THE REQUIRED VACCINES AND REQUIRED ANTIBODY TEST CAN TAKE 6-8 MONTHS. It is recommended to have official proof of your entire HepB vaccination series completion prior to applying to this program. Proof of the entire HepB vaccination series AND the follow-up HepB Surface Antibody Titer will be required by April 2022. In the event of a NON-positive Antibody titer proof of the original vaccine series, proof of the NON-positive titer, AND at least 2 new vaccines must be submitted by May 2022. Additional documentation may also be required. **NO EXCEPTIONS.**
 - **MMR (Measles, Mumps, Rubella)*** – positive antibody titers for all three components or 2 vaccines
 - **Varicella (Chicken Pox)*** – positive antibody titer or 2 vaccines
 - **Tdap (Tetanus, Diphtheria and Pertussis)*** – 1 dose within the last 10 years and updated every 10 years
 - **COVID-19*** – proof of being fully vaccinated; documentation must include the vaccine manufacturer(s)
 - **Negative Tuberculosis (TB) test*** – Negative QuantiFeron Gold blood test or Negative 2-Step TB skin test (consists of two separate Negative TB skin tests completed 1-3 weeks apart); updated annually
 - **CPR** – ONLY the American Heart Association BLS Provider CPR will be accepted; alternative CPR certifications, even through AHA, will be denied; must be kept current
 - **Physical Requirements** – Admitted students will complete and submit the program's Physical Requirements form (<https://tinyurl.com/8askz6uv>)
- * Must include either a copy of an official immunization card or original immunization/medical screening document. Official documentation must include: 1) Your name, 2) Date of Birth, 3) Name of administering Agency or provider, 4) Name of injection, test, etc., and results, if applicable, 5) Date of injection, test, etc., 6) Healthcare Provider's signature, official stamp or letterhead.*
- **RECOMMENDED IMMUNIZATIONS:** Electronic submission of the following will not be required but is recommended. Since some clinical sites in Oregon may require one or both of these immunizations for clinical placement acceptance, not completing these might result in fewer clinical placement options while in the program. (cost varies; not included in estimated program cost.)
 - **Flu shot** – Current flu vaccine & repeated annually
 - **Polio** – Positive antibody titers or 3 doses
 - **DRUG TEST:** Passing the LBCC approved drug test will be required (estimated cost is \$55).
 - **TECHNICAL REQUIREMENTS:** Gaining the technical requirements prior to the start of the program and maintaining them throughout the training will be required (cost varies; not included in estimated cost)
 - **ADMISSION FEE:** Students who have never paid the admission fee will be required to prior to program start
 - **ADDITIONAL COSTS:** Admitted students will receive additional details. Student costs may include the completion of a N-95 mask Fit screen/test through an Occupational Medicine facility (est. cost: \$70 - \$275).

ESTIMATED TUITION, FEES, and PROGRAM FEES

THE ESTIMATED COST of the 2022-24 Diagnostic Imaging Program is \$23,743.08 (subject to increase). This cost consists of both the estimated LBCC Tuition & Fees and the Program Fees. Both will be paid to LBCC. This program is eligible for financial aid, however, Financial Aid cannot be used towards the deposit due to disbursement schedules. To apply for aid you must file a FAFSA each year and include LBCC as a receiving school (006938). Financial Aid is disbursed in payments each term; students might not receive a Financial Aid credit until a year's entire Program Fees shows a zero balance on their LBCC student account.

Estimated LBCC Tuition & Fees (\$11,675.88; subject to increase) refer to the cost of the Diagnostic Imaging Program specific course credits (all courses with a "DI" prefix; as per 2021-22 In-State [per credit table](#); Out-of-state and Foreign/International per credit tuition is higher). LBCC Tuition & Fees are charged by a per term credit count. For LBCC Tuition & Fee payment information go to: <https://www.linnbenton.edu/about-lbcc/departments-and-contacts/business-office.php>.

Estimated Program Fees (\$12,067.20; subject to increase) refer to the Diagnostic Imaging Program's remaining required non-refundable instructional costs, books, and laboratory fees. Payment plans will be available for those who qualify.

Students who will be utilizing a Program Fees payment plan will be required to submit a Deferred Note Contract (DNC) and pay the non-refundable \$2,500 deposit. The deposit is due before any financial aid is received. Additional documentation may be required from students receiving Financial Aid and/or other third party tuition assistance awards. Program Fees are divided equally between the first and second academic year. A payment plan will be made available to admitted students. **The second Program Fees payment of \$883.40 will be due in June 2022.**

ESTIMATED COST by year (subject to increase):

First-Year Estimated LBCC Tuition & Fees AND Program Fees

Year 1 Tuition & Fees (50 cr)
= \$6,787.50

Year 1 Program Fees
= \$6,033.60

**YEAR 1 ESTIMATED COST
= \$12,821.10**

Second-Year Estimated LBCC Tuition & Fees AND Program Fees

Year 2 Tuition & Fees (36 cr)
= \$4,888.38

Year 2 Program Fees
= \$6,033.60

**YEAR 2 ESTIMATED COST
= \$10,921.98**

CANCELLATION: This program is subject to cancellation if there are an insufficient number of clinical sites or eligible students. In the event of cancelation, applicants must reapply for later sessions.

1-Year Medical Assistant - *Fall 2022*

PROGRAM OVERVIEW: The Medical Assistant Program trains students in office administrative and medical skills, to work well with people, and to prepare for taking the American Association of Medical Assistants certification exam. This education pathway will incorporate the cognitive knowledge, psychomotor, and affective domain training to prepare students for their practice as medical assistants. Medical assistants perform a variety of basic medical duties primarily in the outpatient setting. These duties may include taking patient histories; recording patients' vital signs; collecting and preparing laboratory specimens; preparing patients for exams, X-rays and procedures; taking patient EKGs; phlebotomy, wound dressing and other duties. Medical assistants may also have clerical duties, which may include completing insurance forms, scheduling appointments, billing, and bookkeeping.

Medical Assistant students are responsible for determining their own ability to meet the program's physical demands and working conditions (cognitive, motor, physical, and sensory). See page 6 of this bulletin for the current list of Physical Demands and Working Conditions.

LBCC's Medical Assistant program is accredited by the Commission on Accreditation of Allied Health Education Programs (CAAHEP), on the recommendation of the Medical Assistant Education Review Board (MAERB). CAAHEP may be reached at the Commission on Accreditation of Allied Health Education Programs, 9355 113th St. N, #7709, Seminole, FL 33775; 727-210-2350: or at www.caahep.org.

PROGRAM DATES: Fall Term 2022 through Summer Term 2023 at LBCC's [Healthcare Occupations Center](#)

APPLICATION DATES: Online application opens: **June 13, 2022, 9:00 AM** ~ **Still Accepting Applications** ~
(Early applications will not be considered)
Application closes: **September 12, 2022** (*subject to closing earlier if the cohort fills sooner*)

APPLICATION DECISION: Application decision emails will begin to go out **during the week of June 27, 2022**

POST-ADMISSION REQUIREMENTS DEADLINE: **August 2022** (Date TBA; see last page)

CLASS SELECTION PROCESS: Applications are accepted on a first-come, first-served basis with preference given to residents of the Linn-Benton Community College (LBCC) Tax District. It is your responsibility to be informed and adhere to all requirements, procedures and deadlines as they may change from year to year. New applicants to LBCC, as well as previously admitted LBCC students, must complete the following application process.

Resident Priority will be first given to qualified applicants who are residents of the Linn-Benton Community College tax district, followed by in-state, then out-of-state, then international applicants between June 13 - 17, 2022. After these dates Resident Priority will no longer be considered. To determine whether or not you live at such an address (whether you rent or own), please refer to your property tax statement, or inquire at your county tax assessor's office. Some addresses at or near the Linn or Benton county lines, though inside the county limits, might not be within the LBCC tax district. **NOTE:** Not all international student Visas allow students to claim USA permanent residential status and/or to be admitted to this program. International students need to consult LBCC International Admissions to determine if they are eligible to apply. For more information go to <http://www.linnbenton.edu/international-students>.

CANCELLATION: Sessions are subject to cancellation if a minimum number of eligible students are not admitted. Students of canceled sessions must reapply for later sessions.

ADMISSION LIMITATIONS

Applicants should be aware of the following Admission Limitations; failure to comply may result in application denial:

- **APPLICATION COMPLETION:** Applicants must submit proof of completing all Minimum Application Requirements by the deadlines given to be considered for admission to this program. Applicants are responsible for ensuring LBCC's Admission department has up-to-date transcripts and course information for transfer credits they want considered.
- **HOLDS*:** Applicants must have no registration Holds at LBCC during the entire application and admissions process to be considered for admission to this program.
- **ACADEMIC STANDING*:** Applicants' [Academic Standing](#) must be in Good Standing at LBCC during the entire application and admissions process to be considered for admission to this program.
- **STUDENT STATUS*:** Applicants must be in good Student Status with Student Services at LBCC during the entire application and admissions process to be considered for admission to this program.

* To view your Overall Academic Standing and Student Statuses at LBCC: 1) Log in to WebRunner through [Single Sign-On](#), 2) Select "Student," 3) Select "Student Profile," then 4) Select "Registration Notices" in the upper right corner of the page. Contact your LBCC advisor if you have questions about your status.

NOTE REGARDING FINANCIAL AID: The Federal Financial Aid standards and policies regarding Satisfactory Academic Progress (SAP) are not identical to the college's standards on admission/registration eligibility. Poor Financial Aid SAP status will not limit your potential admission into this program, but may severely affect your funding options. To view your current SAP status: 1) Log in to WebRunner, 2) Select "Financial Aid," 3) Select "Your Financial Aid Status," 4) Select the Aid Year. To find out more about applying for Financial Aid through LBCC go to: <https://www.linnbenton.edu/tuition-and-admission/financial-aid/>

CIVIL RIGHTS

Request for Special Needs or Accommodations

Direct questions about or requests for special needs or accommodations to the LBCC Director, Center for Accessibility Resources (CFAR), RCH-105, 6500 Pacific Blvd. SW, Albany, Oregon 97321, Phone [541-917-4789](tel:541-917-4789) or via Oregon Telecommunications Relay TTD at [1-800-735-2900](tel:1-800-735-2900) or [1-800-735-1232](tel:1-800-735-1232). Make sign language interpreting or real-time transcribing requests 2-4 weeks in advance. Make all other requests at least 72 hours prior to the event. LBCC will make every effort to honor requests. LBCC is an equal opportunity educator and employer.

LBCC Comprehensive Statement of Nondiscrimination

LBCC prohibits unlawful discrimination based on race, color, religion, ethnicity, use of native language, national origin, sex, sexual orientation, gender, gender identity, marital status, disability, veteran status, age, or any other status protected under applicable federal, state, or local laws. For further information see Board Policy 1015 in our [Board Policies and Administrative Rules](#). Title II, Title IX (employee cases), & Section 504: Scott Rolen, Director of Human Resource Development and Support, CC-108, 541-917-4425; Title IX (student cases): Jill Childress, Manager for Student Conduct and Retention, WH-215, 541-917-4806, LBCC, Albany, Oregon. If you feel you have been discriminated against in any interaction at Linn-Benton Community College, or have been harassed by another person while at LBCC, or wish to report any concern or complaint, please navigate to this page to make a report: linnbenton.edu/report-it. This and additional information can be found at <https://www.linnbenton.edu/about-lbcc/administration/policies/equal-opportunity.php>.

This and additional information can be found at
<https://www.linnbenton.edu/about-lbcc/administration/policies/equal-opportunity.php>

2022 MEDICAL ASSISTANT MINIMUM APPLICATION REQUIREMENTS

If you satisfy the minimum application requirements and do not have any other admission limitations, you will be considered a qualified applicant. Course numbers noted below refer to LBCC courses as described in the LBCC Catalog. Summer term enrollment (pending completion by September 8, 2022) or placing **above** the course via the LBCC Placement Tests (www.linnbenton.edu/student-assessment) will be accepted. Courses must be completed with a grade of “C” or higher at a regionally accredited institution. Placement Tests must be completed prior to program application. Official transcripts from original institutions are required for proof of transfer course completion. Transfer course equivalency is considered on a case by case basis and is not guaranteed.

| MINIMUM APPLICATION REQUIREMENTS: | |
|-----------------------------------|---|
| | <p>MANDATORY APPLICATION MEETING All applicants must meet with LBCC’s Healthcare Program Academic Planning Specialist regarding this program prior to applying to this program. Email HealthcarePrograms@linnbenton.edu to receive appointment and drop-in dates/times. Appointments often must be made 2 weeks in advance.</p> |
| | <p>CHECK FOR ADMISSION LIMITATIONS (<i>see page 2</i>)</p> |
| | <p>SUBMIT OFFICIAL TRANSCRIPTS from all non-LBCC institutions (www.linnbenton.edu/transcripts) NOTE: <u>Unofficial</u> transcripts will NOT be accepted to show proof of course completion.</p> |
| | <p>ONLINE APPLICATION (<i>see page 4</i>)</p> |
| | <p>MATH PLACEMENT TEST Complete the LBCC Math Placement Test as required for Admission consideration at LBCC or show proof of completing MTH 050 or higher math credits</p> |
| | <p>ONLINE SUPPLEMENTAL INFORMATION FORM After completing the online application, a link to the Online Supplemental Information Form will be sent to applicants via email within 1-3 business days. Information regarding the following will be required to be provided within that form.</p> |
| | <p>➤ Understanding and Compliance (<i>see page 5</i>)</p> |
| | <p>➤ Residency (<i>see page 6</i>)</p> |
| | <p>➤ Minimum Application Requirement Course You will be required to provide the course number, college or university where each course was completed, month and year each course was completed, and the grade received.</p> |
| | <p>WR 115 - Intro to College Writing*</p> |

* Successfully **placing into WR 121 via the LBCC Placement Tests** (www.linnbenton.edu/student-assessment) PRIOR TO APPLYING TO THIS PROGRAM may be used to meet this Minimum Application Requirement. “Self” Placement will not be considered in this application.

Application Questions:

Lorraine Lara

Academic Planning Specialist

HealthcarePrograms@linnbenton.edu

For additional information on the Medical Assistant Program, program success rates, and more go to linnbenton.edu/medical-assistant.

When applying for the 1-YEAR Medical Assistant Program, you are required to apply online. Applications will open online on June 13, 2022 at 9:00 am. Online applications receive an automatic time/date stamp. Early applications will not be considered. Resident Priority ends June 17, 2022 at midnight (see page 1). Application close date to be determined.

Online Application Instructions:

1. Go to <http://www.linnbenton.edu/apply>
2. Select “See Steps to Apply”
3. Select “High school graduates without some previous college credit”
- or - “High school graduates with some previous college credit”
4. Select “Create a WebRunner Account”
5. Select “Show Application Form”
6. Create your Login ID, your PIN, and verify your PIN
7. Select “Login”
8. Select the **Medical Assistant Program** from the Application Type drop down options (See **NOTE** below)
9. Select “Continue”
10. Select “Fall 2022” from the Admission Term drop down options
11. Enter at least your **first** and **last name** into the appropriate boxes
12. Select “Fill Out Application”
13. Complete all online application checklist items:
 - ✓ Name
 - ✓ Permanent Address
 - ✓ Personal Information¹
 - ✓ Mailing Address, if different from permanent
14. Select “Application is Complete”²

RETURNING/EXISTING LBCC STUDENTS: Log in to your WebRunner account, select the “Student” tab, select “Admissions”, select “Apply with an online application”, select “New” to create a new application, and then, *beginning at step 8*, follow the rest of the above online application steps. (See **NOTE** below)

NOTE: Selecting any other application type will prevent you from being able to proceed through this program’s application processes, thus may forfeit your admission consideration. If you are applying within the appropriate application dates but are unable to view this program on the Application Type drop down list, create a new application by starting at Step 1 (using a new Login ID and password). Be sure to select the appropriate program type from the drop down list. Do NOT select *A New Student* nor *Transfer Student*.

Remember: After completing the Online Application for Admission you will receive an email with a link to the Online Supplemental Information Form with a response deadline included. See pages 3 and 5 for additional information.

Tips: ¹ Date of Birth (DOB) and Social Security Numbers (SSN) are used, in part, to help ensure applications are not mismatched between LBCC applicants with the same names. During this step of the application process entry of DOB will be required and entry of SSN will be optional. Both may be required for other admission requirements.

² Once you submit your application a time/date stamp will be applied electronically. If additional information is needed to process your online application, you will be contacted by a staff member from the Admissions department. Failure to provide accurate information will result in your application being delayed and may result in it being denied.

2022 STATEMENT OF UNDERSTANDING AND COMPLIANCE

When applying to this program you will be required to affirm that you understand all of the following:

- Students admitted to this program must be the age of 18 or older prior to the scheduled start date.
- LBCC's Students Right to Know information located at www.linnbenton.edu/student-rights.
- Admission Limitations, Financial Aid Satisfactory Academic Progress, and Student Civil Rights outlined on page 2.
- Applicants must comply with all application criteria and deadlines in this bulletin.
- Communication from LBCC regarding your program application will be sent to your LBCC email account. If you do not yet have an LBCC email, LBCC will send information via your personal email until an LBCC email has been assigned.
- Some occupational health hazards include the use of latex gloves and masks. Meet with the Medical Assistant advisor if you have any skin, breathing, or other risk factors to consider.
- Participation in this program requires you to not have color blindness and to be able to lift/carry/push/pull and move heavy objects, patients, supplies and equipment (at least 50 lbs.); demonstrate manual dexterity and eye-hand coordination; stand and walk for prolonged periods; reach, stoop, bend, kneel, crouch, stretch and squat; distinguish letters and symbols; and, with corrected normal vision and hearing, be able to distinguish changes in a patient's vitals.
- If you have a communicable disease which may be transmitted under normal Medical Assistant activities, you will be required to have documentation of completing medical treatment prior to participating in clinical/lab assignments.
- Admitted students will be required to complete all LBCC admissions processes and graduation requirements.
- Admitted students will be required to pay for and complete the LBCC approved criminal background check. The results will determine, in part, eligibility to remain in the program but will not guarantee eligibility to be licensed or employed in this career field. Neither previously completed nor alternative background checks will suffice.
- Admitted students will have their social security number (SSN) matched against the US Department of Health & Human Services list of individuals who are barred from any participation in federally funded health programs. If on the list, you will not be eligible to participate in this program.
- Admitted students will be required to cooperate with the drug test policies of any work experience, clinical or cooperative teaching site as a condition for continued enrollment in this program and/or related academic courses. A student may be required to comply with the non-LBCC site's policy. Testing may be random and unannounced or conducted when there is reasonable suspicion that performance and/or work behavior may be the result of the presence of a drug. The presence, as determined by the program's test procedures, of prescription or non-prescription drugs, controlled substances or cannabis may result in immediate dismissal from the work site and disenrollment from the course and/or related academic program if the course is a requirement for program completion. The student may also be subject to appropriate disciplinary action for violating LBCC's Student Standards of Conduct.
- Admitted students will be required to pay for, submit proof of, and keep current all post-admission requirements, including immunizations, medical screens, and CPR certification as per the criteria and deadlines which will be specified in the admission materials.
- Admitted students will be required to submit proof of being fully vaccinated for COVID-19 as one of the post-admission requirements. Completion deadline to be determined. At this time, exemptions are not being considered by our clinical partner healthcare sites for students who will have direct patient contact.
- Admitted students will be required to maintain a minimum "C" grade in each degree required course, and courses must be taken in the specified sequence.

RESIDENCY INFORMATION FOR SPECIAL ADMISSION PROGRAMS

For admission to special programs, a resident is defined as someone who established permanent residency 90 days before the first day applications are accepted for that program. Permanent residency is defined as the home a person intends to return to after any absence, and in which one's dependents reside for an unlimited period of time. As part of the Online Supplemental Information Form you will be required to submit information regarding your residency for the entire 90 day period leading up to the application. Information you will be required to provide includes legal name, phone number, LBCC student ID or Social Security Number, program of choice, street address, city, state, ZIP, and time period at the applicable address(es). You may be required to submit additional documentation upon request to show proof of your permanent residence. Misrepresentation of your permanent residence may result in forfeiture of your application status with this program.

PHYSICAL DEMANDS AND WORKING CONDITIONS

Students admitted to Linn-Benton Community College's (LBCC) Medical Assistant Program are responsible for determining their own ability to meet the below mentioned cognitive, motor, physical, and sensory requirements. Admitted students must inform the program faculty of any related potential problem areas. Questions about or requests for special needs or accommodations must be directed to LBCC's Center for Accessibility Resources (phone: 541-917-4789; or via Oregon Telecommunications Relay TTD at 1-800-735-2900 or 1-800-735-1232; or Albany LBCC Campus, room RCH-105, 6500 Pacific Blvd. SW, Albany, Oregon 97321). Requests must be made at least 72 hours prior to the start of an event. Students with disabilities who enter the program do so with the understanding that they will be expected to meet all classroom, lab, and clinical partner site requirements with any REASONABLE accommodations that may be provided by the college. The Physical Demands and Working Conditions for Medical Assistants include but are not limited to:

- Frequently work in a standing position and do frequent walking.
- Lift and transfer patients up to six inches (6") from a stooped position, then push or pull the weight up to three feet (3').
- Lift and transfer patients from a stooped to an upright position to accomplish exam table-to-chair and chair-to-exam table.
- Physically apply up to ten pounds (10#) of pressure to bleeding sites, or in performing CPR.
- Respond and react immediately to verbal instructions/requests and to auditory signals from monitoring equipment; perform auditory auscultation without impediment.
- Physically perform up to a twelve-hour shift clinical laboratory experience.
- Physically close and distance visual activities involving objects, persons, and paperwork, as well as discriminate depth and color perception.
- Discriminate between sharp/dull and hot/cold when using both hands.
- Perform mathematical calculations for medication preparation and administration.
- Communicate effectively, both orally and in writing, using appropriate grammar, vocabulary, word usage, and interpersonal skills.

POST-ADMISSION REQUIREMENTS

Please do not turn in proof of the items listed below with your application packet. Only students who are admitted to this program will be required to complete all Post-Admission Requirements. Additional instructions will be provided with the admission offer emails. The estimated costs of the following are NOT included in the program's tuition and fees. The following are subject to change:

- **MANDATORY ORIENTATION:** Admitted students will be required to attend (August 23rd, 5:30 - 6:30 PM)
- **SUMMER TERM COMPLETION:** If applicable, submit official proof of Summer term minimum application course completion with a "C" grade or better.
- **RECORD RELEASE:** All admitted students will be required to complete and submit a Record Release form
- **CRIMINAL BACKGROUND CHECK:** All admitted students will be required to complete and pass the LBCC approved criminal background check to remain eligible for this program (estimated cost: \$66)
- **DRUG TEST:** Instructions regarding the drug test (completing and clearing) as a requirement for continued admission will be provided with the admission email (estimated cost is \$55)
- **REQUIRED HEALTH AND TRAINING DOCUMENTATION:** All admitted students will be required to electronically submit the appropriate immunization, medical screening, and CPR documentation (estimated review and tracking cost is \$43; cost of immunizations, medical screenings, and CPR certification varies).
 - **Positive Hepatitis B surface antibody titer*** – blood test; vaccinations alone do NOT meet this criteria
NOTE: Early action on this item is necessary. Completion of the required vaccines and required antibody test can take 6-8 months. It is recommended to have official proof of the entire HepB vaccine series completion prior to applying to this program. Proof of the entire HepB vaccine series AND the follow-up HepB Surface Antibody Titer will be required by July 2022. In the event of a NON-positive Antibody Titer proof of the original vaccine series, of the NON-positive titer, AND proof of new HepB vaccines must be submitted by August 2022. Additional documentation may be required.
 - **MMR (Measles, Mumps, Rubella)*** – positive antibody titers for all three components or 2 vaccines
 - **Varicella (Chicken Pox)*** – positive antibody titer or 2 vaccines
 - **Tdap (Tetanus, Diphtheria and Pertussis)*** – 1 dose within the last 10 years and updated every 10 years
 - **COVID-19*** – proof of being fully vaccinated; documentation must include the vaccine manufacturer(s)
 - **Negative Tuberculosis (TB) test*** – Negative QuantiFeron Gold blood test or Negative 2-Step TB skin test (consists of two separate Negative TB skin tests completed 1-3 weeks apart); updated annually
 - **Physical Demands and Working Conditions** – See page 6
 - **CPR** – ONLY the American Heart Association BLS Provider CPR will be accepted; alternative CPR certifications, even through AHA, will be denied; must be kept current
- **ADMISSION FEE:** Students who have never paid the admission fee will be required to prior to program start
- **ADDITIONAL COSTS:** Admitted students will receive additional details. Student costs may include the completion of a N-95 mask Fit screen/test through an Occupational Medicine facility (est. cost: \$70 - \$275) and the purchase of field specific student liability insurance (costs vary).

RECOMMENDED IMMUNIZATIONS: The following immunizations are recommended but not required for admission to this program. Since some clinical sites in Oregon require one or both of these immunizations for clinical placement acceptance, not completing these might result in fewer clinical placement options while in the program. (Costs vary)

- **Flu shot*** – Current flu vaccine & updated annually
- **Polio*** – positive antibody titers or 3 vaccines

** Documentation must be either a copy of an official immunization card or original immunization/medical screening document. Documentation must include: 1) Your name, 2) Date of Birth, 3) Name of administering Agency or provider, 4) Name of injection, test, etc., and results, if applicable, 5) Date of injection, test, etc., 6) Healthcare Provider's signature, official stamp or letterhead.*

Nursing Program - Fall 2022

PROGRAM OVERVIEW: The Associate of Applied Science Degree Nursing program is approved by the Oregon State Board of Nursing. This two-year program is designed to train highly skilled nurses. Upon successful completion of all program requirements students will be eligible to apply for an Associate of Applied Science degree and to take the National Council Licensure Examination for Registered Nurse licensing (NCLEX-RN). The Nursing Program courses are scheduled to take place at the Lebanon, Oregon LBCC Healthcare Occupation Center and other healthcare facilities in the Willamette Valley. For additional information on program format, costs, and more, go to www.linnbenton.edu/nursing.

PROGRAM DATES: Fall Term 2022 – Spring Term 2024

APPLICATION DATES: Online application opens: **March 21, 2022, midnight**
(Neither early nor late applications will be accepted.)
Online application deadline: **April 1, 2022, midnight**

TRANSFER CREDIT OFFICIAL TRANSCRIPT DEADLINE: April 11, 2022

POINTS LETTERS: Emailed to your LBCC email account **during the week of April 25, 2022**

APPLICATION DECISION: Emailed to your LBCC email account **during the week of May 9, 2022**

MANDATORY ORIENTATION: June 2022 (Location/Date/Time TBA)

POST-ADMISSION REQUIREMENTS DEADLINE: July 2022 (see last page)

CLASS SELECTION PROCESS: Admission to the program is based on the point system and NOT a first-come, first-served basis. Admission limitations may apply (see page 2). Ties between applicants with the same point totals will be broken based at least upon the applicants' (a) number of points for Work Experience, then (b) accumulative points received for BI231, BI232, BI233. Only qualified applicants will have their points evaluated (see page 3). The number of points needed for admission varies based on the applicant pool. The Nursing Program accepts one cohort per year beginning Fall Term. It is your responsibility to be informed on and adhere to all requirements, procedures and deadlines as they may change from year to year. New applicants as well as applicants from previous years must complete the entire application process. The program is subject to cancellation if there are an insufficient number of clinical sites or eligible students. Students admitted to a cancelled session must reapply to be given consideration for admission to the next session.

RESIDENT POINTS: Qualified applicants who are residents of the Linn-Benton Community College (LBCC) tax district and/or Linn or Benton County will receive 5 Resident Points. To be eligible for Resident Points, you must establish residency at least 90 days prior to the first day applications are accepted. To determine whether or not you live at such an address (whether you rent or own), you may refer to your property tax statement or inquire through your county tax assessor's office. Misrepresentation of permanent residence may result in application forfeiture. **NOTE:** Not all international student Visas allow students to claim USA permanent residential status and/or to be admitted to this program. International students need to consult LBCC International Admissions to see if they are eligible to apply. <http://www.linnbenton.edu/international-students>

ALTERNATE POINTS: 2 points possible; applicable to 2021 Alternates who accepted their alternate status by the 2021 deadline and did not receive a 2021 admission offer

GRADE BASED COURSES: 24 points possible (see page 3)

COLLEGE LEVEL EDUCATION*: 4 points possible; 1 point per category (see page 3) *Consult your advisor about possible Financial Aid consequences of earning a degree prior to Nursing admission.

WORK EXPERIENCE: 5 points possible (see page 6)

ADMISSION LIMITATIONS

Applicants should be aware of the following Admission Limitations; failure to comply may result in application denial:

- **PREVIOUSLY ADMITTED STUDENTS:** Applicants who have previously been admitted to this program are no longer eligible to apply if they exited the program based on safety concerns or if they exited the program two previous times based on unsuccessful attempts to pass academic and/or clinical requirements not directly related to safety (includes withdrawal in lieu of failing grades).
- **APPLICATION COMPLETION:** Applicants must submit proof of completing all Minimum Application Requirements by the deadlines given to be considered for admission to this program. Applicants are responsible for ensuring LBCC's Admission department has up-to-date transcripts and course information for transfer credits they want considered.
- **HOLDS*:** Applicants must have no registration Holds at LBCC during the entire application and admissions process to be considered for admission to this program.
- **ACADEMIC STANDING*:** Applicants' [Academic Standing](#) must be in Good Standing at LBCC during the entire application and admissions process to be considered for admission to this program.
- **STUDENT STATUS*:** Applicants must be in good Student Status with Student Services at LBCC during the entire application and admissions process to be considered for admission to this program.

* To view your Overall Academic Standing and Student Statuses at LBCC: 1) Log in to WebRunner through [Single Sign-On](#), 2) Select "Student," 3) Select "Student Profile," then 4) Select "Registration Notices" in the upper right corner of the page. Contact your LBCC advisor if you have questions about your status.

NOTE REGARDING FINANCIAL AID: The Federal Financial Aid standards and policies regarding Satisfactory Academic Progress (SAP) are not identical to the college's standards on admission/registration eligibility. Poor Financial Aid SAP status will not limit your potential admission into this program, but may severely affect your funding options. To view your current SAP status: 1) Log in to WebRunner, 2) Select "Financial Aid," 3) Select "Your Financial Aid Status," 4) Select "academic progress." To find out more about applying for Financial Aid through LBCC go to:

<https://www.linnbenton.edu/tuition-and-admission/financial-aid/>

CIVIL RIGHTS

Request for Special Needs or Accommodations

Direct questions about or requests for special needs or accommodations to the LBCC Director, Center for Accessibility Resources (CFAR), RCH-105, 6500 Pacific Blvd. SW, Albany, Oregon 97321, Phone [541-917-4789](tel:541-917-4789) or via Oregon Telecommunications Relay TTD at [1-800-735-2900](tel:1-800-735-2900) or [1-800-735-1232](tel:1-800-735-1232). Make sign language interpreting or real-time transcribing requests 2-4 weeks in advance. Make all other requests at least 72 hours prior to the event. LBCC will make every effort to honor requests. LBCC is an equal opportunity educator and employer.

LBCC Comprehensive Statement of Nondiscrimination

LBCC prohibits unlawful discrimination based on race, color, religion, ethnicity, use of native language, national origin, sex, sexual orientation, gender, gender identity, marital status, disability, veteran status, age, or any other status protected under applicable federal, state, or local laws. For further information see Board Policy 1015 in our [Board Policies and Administrative Rules](#). Title II, Title IX (employee cases), & Section 504: Scott Rolen, Director of Human Resource Development and Support, CC-108, 541-917-4425; Title IX (student cases): Jill Childress, Manager for Student Conduct and Retention, WH-215, 541-917-4806, LBCC, Albany, Oregon. If you feel you have been discriminated against in any interaction at Linn-Benton Community College, or have been harassed by another person while at LBCC, or wish to report any concern or complaint, please navigate to this page to make a report: linnbenton.edu/report-it. This and additional information can be found at <https://www.linnbenton.edu/about-lbcc/administration/policies/equal-opportunity.php>.

This and additional information can be found at

<https://www.linnbenton.edu/about-lbcc/administration/policies/equal-opportunity.php>

2022 NURSING APPLICATION CHECKLIST

If you satisfy the minimum application requirements and do not have any other admission limitations, you will be considered a qualified applicant. Course credits must be completed with a grade of “C” or higher at a regionally accredited institution prior to the application deadline. Course numbers listed below refer to LBCC courses as described in the LBCC Catalog. Official transcripts from original institutions are required for proof of transfer course completion. Transfer course equivalency is considered on a case by case basis and is not guaranteed. **Only the first two course completion attempts made within the last 5 years will be considered.**

2022 MINIMUM APPLICATION REQUIREMENTS

| |
|--|
| CHECK FOR ADMISSION LIMITATIONS (see page 2) |
| SUBMIT OFFICIAL TRANSCRIPTS for all transfer courses by April 11, 2022 (linnbenton.edu/transcripts) |
| ONLINE APPLICATION (see page 4) |
| ONLINE SUPPLEMENTAL INFORMATION FORM After completing the online application, a link to the Online Supplemental Information Form will be sent within 3 business days. Information regarding the following will be required within that form. NOTE: Applicants will be required to supply the following for each applicable course: course number, institution where each course was completed, month and year of completion, and the grade received. |
| ➤ Current Unencumbered Oregon CNA (must be kept valid throughout the entire application process) All applicants will be required to submit their Oregon CNA number and date of expiration |
| ➤ Understanding and Compliance (see page 5) |
| ➤ Minimum Application Requirement Courses* |
| MTH 095 – Intermediate Algebra** or higher (completed since September 2017) |
| WR 121 – English Composition |
| BI 231 - Anatomy & Physiology I |

2022 POINT SYSTEM

| | |
|--|---------------------|
| ➤ Grade Based Points Courses* (A = 4 points, B = 3 points, C = 2 points) | |
| BI 231 - Anatomy & Physiology I | 2 - 4 Points |
| BI 232 - Anatomy & Physiology II | 2 - 4 Points |
| BI 233 - Anatomy & Physiology III (completed since September 2017) | 2 - 4 Points |
| BI 234 - Microbiology (completed since September 2017) | 2 - 4 Points |
| NUTR 225 - Nutrition (previously NFM 225) | 2 - 4 Points |
| PSY 215 - Developmental Psychology | 2 - 4 Points |
| ➤ Resident Points (see page 1) | 5 Points |
| ➤ Alternate Points (see page 1) | 2 Points |
| ➤ College Level Education , if applicable (see page 1) | |
| Categories: Associate’s Degree (1 point max), Bachelor’s Degree (1 point max), Master’s Degree (1 point max), PhD/EdD (1 point max) | 1 - 4 Points |
| ➤ Work Experience Form Submission , if applicable (see page 6) | 1 - 5 Points |

NOTE: Some of the above courses (ex: BI231) may first require completion of one or more prerequisites. See LBCC’s catalog (linnbenton.edu/catalog) for additional information regarding course prerequisites.

* Students admitted to this program will be required to complete the above courses and may be required to complete additional Nursing degree requirements as outlined in the 2022-23 LBCC catalog (linnbenton.edu/catalog).

** IF math credits are at or above the required skill level but older than 5 years, then an [LBCC Math Placement Test](#) (NOT “Self Placement”) into or above MTH 111 within the last 5 years and achieved PRIOR TO APPLYING TO THIS PROGRAM may be used in conjunction with the older math credits; a Math Placement Test alone will not suffice.

ONLINE APPLICATION INFORMATION

When applying for the Nursing Program you are required to apply online. Applications will open online on March 21, 2022 at midnight. The deadline is April 1, 2022. Online applications will receive an automatic time/date stamp once submitted. Neither early nor late applications will be considered.

Online Application Instructions:

1. Go to <http://www.linnbenton.edu/apply>
2. Select “See Steps to Apply”
3. Select “High school graduates without some previous college credit”
- or - “High school graduates with some previous college credit”
4. Select “Create a WebRunner Account”
5. Select “Show Application Form”
6. Create your **Login ID**, your **PIN**, and verify your **PIN**
7. Select “Login”
8. Select the **Nursing Program** from the Application Type drop down options (See **NOTE** below)
9. Select “Continue”
10. Select “Fall 2022” from the Admission Term drop down options
11. Enter at least your **first** and **last name** into the appropriate boxes
12. Select “Fill Out Application”
13. Complete all online application checklist items:
 - ✓ Name
 - ✓ Permanent Address
 - ✓ Personal Information¹
 - ✓ Mailing Address, if different from permanent
14. Select “Application is Complete”²

RETURNING/EXISTING LBCC STUDENTS: Log in to your WebRunner account, select the “Student” tab, select “Admissions”, select “Apply with an online application”, select “New” to create a new application, and then, *beginning at step 8*, follow the rest of the above online application steps. (See **NOTE** below)

NOTE: Selecting any other application type will prevent you from being able to proceed through this program’s application processes, thus may forfeit your admission consideration. If you are applying within the appropriate application dates but are unable to view this program on the Application Type drop down list, create a new application by starting at Step 1 (using a new Login ID and password). Be sure to select the appropriate program type from the drop down list. Do NOT select *A New Student* nor *Transfer Student*.

Remember: After completing the Online Application for Admission you will receive an email with a link to the Online Supplemental Information Form with a response deadline included. See pages 3 and 5 for additional information.

Tips: ¹ Date of Birth (DOB) and Social Security Numbers (SSN) are used, in part, to help ensure applications are not mismatched between LBCC applicants with the same names. During this step of the application process entry of DOB will be required and entry of SSN will be optional. Both may be required for other admission requirements.

² Once you submit your application a time/date stamp will be applied electronically. If additional information is needed to process your online application, you will be contacted by a staff member from the Admissions department. Failure to provide accurate information will result in your application being delayed and may result in it being denied.

APPLICATION QUESTIONS

Lorraine Lara, Academic Planning Specialist
Office located on Albany campus
HealthcarePrograms@linnbenton.edu

2022 STATEMENTS OF UNDERSTANDING AND COMPLIANCE

When applying to this program, you will be required to affirm that you understand all of the following:

- The Oregon State Board of Nursing (OSBN) reviews applicants for RN licensure following completion of LBCC's Nursing Program. According to the Oregon State Board of Nursing, per OAR 851-031-0005(1)(a)(b) "licensure may be denied to students with a criminal offense and those with a major physical or mental condition that could affect their ability to practice nursing safely." **OSBN requires all applicants to have a Social Security Number (SSN). Direct related questions to OSBN at: 17938 SW Upper Boones Ferry Rd. Portland, OR, 97224, 971-673-0685.**
- Students admitted to this program must be the age of 18 or older prior to the scheduled start date.
- Applicants who were previously admitted to this program are no longer eligible to apply IF they exited the program based on safety concerns or IF they exited the program two previous times based on unsuccessful attempts to pass academic and/or clinical requirements not directly related to safety (includes withdrawal in lieu of failing grades).
- LBCC's Student Right to Know information located at www.linnbenton.edu/student-rights
- Admission Limitations, Financial Aid's Satisfactory Academic Progress, and Student Civil Rights outlined on page 2.
- Applicants must comply with all application criteria and deadlines in this bulletin.
- Communication from LBCC regarding your program application will be sent to your LBCC email account. If you do not yet have an LBCC email, LBCC will send information via your personal email until an LBCC email has been assigned.
- Some occupational health hazards in this program include heavy lifting, exposure to bodily fluids and the use of latex gloves and masks. Meet with the Nursing Program Administrator if you feel you have any risk factors to consider.
- If you are suspected of or known to have a communicable disease which may be transmitted under normal Nursing Program activities, you will be required to have documentation of completing medical treatment prior to participating in clinical/lab assignments.
- Admitted students will be required to complete all LBCC admissions processes and graduation requirements.
- Admitted students will be required to pay for, submit proof of, and keep current Professional Liability Insurance as a "student nurse". Information will be provided to admitted students during orientation.
- Admitted students will be required to complete and pass all post-admission requirements by the deadlines which will be specified in the admission materials.
- Admitted students will be required to pay for and complete the LBCC approved criminal background check. The results will determine, in part, eligibility to remain in the program but will not guarantee eligibility to be licensed or employed in this career field. Neither previously completed nor alternative criminal background checks will suffice.
- If admitted, your social security number (SSN) will be matched against the US Department of Health & Human Services list of individuals who are barred from any participation in federally funded health programs. If on the list, you will not be eligible to participate in this program.
- If admitted, you will be required to cooperate with the drug test policies of the program as well as any clinical experience or cooperative teaching site as a condition for continued enrollment in the program and/or related academic courses. You may be required to comply with a non-LBCC site's policy. Testing may be random and unannounced or conducted when there is reasonable suspicion that performance and/or behavior may be the result of the presence of a drug. The presence, as determined by the program approved test procedures, of prescription or non-prescription drugs, controlled substances or cannabis may result in immediate dismissal from the work site and disenrollment from the course and related academic program. You may also be subject to appropriate disciplinary action for violating the Standards of Conduct as noted in LBCC's Student Right to Know.
- If admitted, you will be required to pay for, submit proof of, and keep current the required immunizations, medical screens, and CPR certification as per the criteria and deadlines which will be specified in the admission materials.
- If admitted, you will be required to submit proof of the entire Hepatitis B vaccination series AND a positive HepB surface antibody blood test by June 2022. See page 7 of this bulletin for additional details.
- If admitted, you will be required to maintain a minimum "C" grade in all Nursing theory courses, a "Pass" in the clinical courses, and a "C" grade in all other degree course requirements to remain in the program. All courses must be taken in the specified sequence.
- Admitted students will be required to submit proof of being fully vaccinated for COVID-19 as one of the post-admission requirements. At this time, exemptions are not being considered by our clinical partner healthcare sites for students who will have direct patient contact.
- If admitted, you will be required to complete all requirements for an Associates of Applied Science in Nursing degree as per the year and term you are admitted to the program to be eligible for graduation upon completion.

WORK EXPERIENCE VERIFICATION FORM

You may receive points for showing proof of work experience within one of the categories listed below. Work experience may only be verified using this form and the lower portion must be completed by the Supervisor or Human Resources representative of the facility in which you received your work experience. You may duplicate this form as needed to show proof of the minimum hours, but only ONE Work Experience Category will be considered toward points. Incomplete forms will not be considered for points. **NOTE:** To submit the form, an electronic copy of the completed form will need to be uploaded during your completion of the Online Supplemental Information Form submission (see page 3).

Dear Supervisor/Human Resources,
I am in the process of applying to the Nursing Program offered through Linn-Benton Community College. The points process requests verification of applicable work experience within one of the categories listed below (may be from more than one location).

I, _____ (program applicant’s name), attest that the information on this form is true and accurate, and I authorize the college to contact the individuals listed on this form to verify the information provided.

Program Applicant’s Signature: _____ **Date:** _____

- - - - - The portion below is to be completed by your Supervisor/Human Resources Representative - - - - -

A. Work Experience Category: (Select one)

____ **Current Unencumbered LPN License (4 points)**

- Training must have included internship/externship hours
- Must submit proof of current unencumbered license with this form

____ **Paid work experience as a CNA (0 - 5 points)**

- 400 hrs = 5 points; 300 hrs = 3 points; 200 hrs = 2 points; 100 hrs = 1 point
- Position must REQUIRE a CNA certification to be eligible for these points
- Information below must be completed AND signed by the supervisor or human resources representative
- Must submit proof of current unencumbered CNA certification with this form

____ **Paid work experience in a certified allied healthcare field for at least 480 hours within the last year (2 points)**

- Position must REQUIRE an allied healthcare field certification/license to be eligible for these points
- Information below must be completed by the supervisor or human resources representative
- Must submit proof of current unencumbered allied healthcare field certification/license with this form

____ **Military service in a medical Military Occupational Specialty (MOS) within the last 5 years (1 point)**

- Information below must be completed by the unit commander or personnel officer
or submit verification of service record which show proof of medical MOS

B. Applicant’s Position Title: _____

C. Required Certification/License for this position: _____

D. Dates of Service: _____ **Total Paid hours:** _____

E. Name of Facility: _____ **Phone:** _____

Facility Address: _____

F. Site Representative’s Name: _____ **Title:** _____

Site Contact’s Email: _____

Site Representative's Signature: _____ **Date:** _____

POST-ADMISSION REQUIREMENTS

Please do not turn in proof of the items listed below with your application packet. Only students who are admitted to this program will be required to complete all Post-Admission Requirements. Additional instructions will be provided with the admission offer emails. The estimated costs of the following are not included in the cost of program tuition and fees. The following are subject to change:

- **CONFIRMATION:** All admitted students and Alternates will be required to submit a status commitment form by a specific deadline to maintain their 2022 application status
 - **EMAIL:** Admitted students will be required to use their LBCC student email while in the program
 - **CNA CREDENTIALS:** It is highly recommended for admitted students to maintain their Oregon CNA credentials throughout their time in the Nursing Program
 - **MANDATORY ORIENTATION:** Attend the Mandatory Orientation in June 2022 (location/date/time TBA)
 - **COURSE COMPLETION:** Admitted students will be required to have completed BI 232, BI 233, BI 234, NUTR 225, and PSY 215 with a grade of "C" or higher by the end of Summer Term 2022 to remain in the program.
 - **PROFESSIONAL LIABILITY INSURANCE:** Admitted students will receive additional details during Orientation
 - **INFORMATION RELEASE:** Instructions will be provided to admitted students with the admission materials
 - **CRIMINAL BACKGROUND CHECK:** Passing the LBCC approved criminal background check will be required (estimated cost is \$66)
 - **DRUG TEST:** Passing the LBCC approved drug test will be required (estimated cost is \$55)
 - **HEALTH AND TRAINING DOCUMENTATION:** Electronic submission of appropriate health and training documentation will be required (estimated review and tracking cost: \$43; costs vary)
 - **Positive Hepatitis B surface antibody titer*** – blood test; vaccinations alone will not suffice.
NOTE: EARLY ACTION ON THIS ITEM IS REQUIRED. COMPLETION OF THE REQUIRED VACCINES AND REQUIRED ANTIBODY TEST CAN TAKE 6-8 MONTHS. It is recommended to have official proof of your entire HepB vaccination series completion prior to applying to this program. Proof of the entire HepB vaccination series AND the follow-up Positive HepB Surface Antibody Titer will be required by June 2022. In the event of a NON-positive Antibody Titer proof of the original vaccine series, proof of the NON-positive titer, AND at least 2 new vaccines must be submitted by July 2022. Additional documentation may also be required. **NO EXCEPTIONS.**
 - **MMR (Measles, Mumps, Rubella)*** – positive antibody titers for all three components or 2 vaccines
 - **Varicella (Chicken Pox)*** – positive antibody titer or 2 vaccines
 - **Tdap (Tetanus, Diphtheria and Pertussis)*** – 1 dose within the last 10 years and updated every 10 years
 - **COVID-19*** – proof of being fully vaccinated; documentation must include the vaccine manufacturer(s)
 - **Negative Tuberculosis (TB) test*** – Negative QuantiFeron Gold blood test or Negative 2-Step TB skin test (consists of two separate Negative TB skin tests completed 1-3 weeks apart); updated annually
 - **Physical Exam** - Admitted students will receive the program specific physical examination form to have completed by their healthcare provider
 - **CPR** – ONLY AMERICAN HEART ASSOCIATION'S (AHA) BLS PROVIDER CPR CERTIFICATION will be accepted. Alternative certifications, even through AHA, will be denied. CPR must be kept current.
- * Proof of vaccination/medical screening must be a copy of an official immunization card / copy of an original immunization/medical screening document. Documentation must include: 1) Your name, 2) Date of Birth, 3) Agency or provider administering the injection, test, etc., 4) Name of injection, test, etc., and results, if applicable, 5) Date of injection, test, etc., 6) Healthcare Provider's signature, official stamp or letterhead.*
- **ADMISSION FEE:** Students who have never paid the admission fee will be required to prior to program start
 - **RECOMMENDED IMMUNIZATIONS:** Submission of the following are recommended but not required. Some clinical sites in Oregon may require one or both of these immunizations for clinical placement acceptance, thus choosing not to complete these might result in fewer clinical placement options while in the program.
 - **Flu shot** – Current influenza vaccine & repeated annually
 - **Polio** – positive antibody titers or 3 vaccines
 - **ADDITIONAL COSTS:** Admitted students will receive additional details. Student costs may include the completion of a N-95 mask Fit screen/test through an Occupational Medicine facility (est. cost: \$70 - \$275).



Nursing

Assistant Level 1

2022 Fall Term

PROGRAM OVERVIEW: The Nursing Assistant Level 1 Course offers a noncredit 9 week hybrid course. Lecture materials are provided through an online self motivated learning system design to prepare students for the face to face skills labs and clinical rotations. All "skills labs" are held in the Nursing Assistant Lab located on the Linn Benton Community College Healthcare Occupations Center campus at 300 Mullins Drive in Lebanon, OR.

Clinical rotations, consisting of 10 students per each class, are assigned to an Oregon State Board of Nursing approved skilled nursing facility located in Lebanon, Oregon.

The schedules are ready and applications will open tomorrow at 7:30 am. Live link to the application form will be embedded on the last page of this bulletin.

Fall Term Class Schedules (click on the schedule to access the file):

[Schedule #1 - Thursday evening & Friday Days](#)

[Schedule #2 - Skills Labs Tues/Wed Evenings & Sat. Day Clinicals](#)

For additional information, call the Nursing Assistant Dept. at 541-917-4738 or visit our webpage at:

<https://www.linnbenton.edu/educational-options/healthcare/nursing-assistant/index.php>

PROGRAM EXPENSES: [2022 Program Expenses](#)

Before applying to the Nursing Assistant Level 1 course, view the following informational slide presentation, Disqualifying Crimes, and LBCC student rights and responsibilities (students selected for the course are required to self-disclose any/all criminal history to license as a CNA):

1. Nursing Assistant Course Slide Presentation:

<https://drive.google.com/file/d/0ByxYEzLOzaXpN3M3bE5NVjlfRU0/view?usp=sharing>

2. Oregon Department of Human Services criminal history requirements and policies located in Division 7 located at

<https://secure.sos.state.or.us/oard/displayDivisionRules.action?selectedDivision=1626>. I have

also received and read the Oregon Board of Nursing's criminal history requirements and policies found in Division 1 of the Nurse Practice Act located at

http://arcweb.sos.state.or.us/pages/rules/oars_800/oar_851/851_001.html.

3. The student may be subject to appropriate disciplinary action for violating the "Standards of Conduct" as outlined in the *Students' Rights and Responsibilities* document. This document is available at:

<https://www.linnbenton.edu/about-lbcc/administration/policies/student-rights-responsibilities-and-conduct.php>

NURSING ASSISTANT APPLICATION REQUIREMENTS

Students must submit a qualified application to be considered for acceptance to this course. Please refer to the following requirements for applying to this course.

1. *Applicants must have a GED or high school diploma (proof of college degree will be accepted in lieu of diploma).*
2. *Transmit required documentation, listed below, with the application.*

Students will be required to electronically submit the appropriate documentation or a note stating the documents will be forwarded by the deadline posted below to complete their application. There will be a review of the application upon submission. If a document is missing the applicant will receive an email requesting the missing documents be emailed to the sender by a specified date. **DO NOT submit a second application.**

Document Deadline: Emails will be sent to all applicants once applications are reviewed.

CPR/AED Card – Current CPR certification that covers the entire course of instruction; **ONLY** American Heart Association’s BLS CPR certification for healthcare providers is accepted. **All other CPR certifications will be denied.** Use the following link for additional Information on obtaining the correct CPR/AED Card:

https://docs.google.com/document/d/13eCOhuf_mKG_toLt8zAH3kjGaDrXPYw5mR6lheyMaXs/edit?usp=sharing

Negative TB test (Photocopy of results) – The report must be performed within 1 year from the term end date. The report must contain your name, identifying information (date of birth, address); test reading date, statement of a negative result, and an official medical professional (doctor, nurse, or CMA from a licensed practice). Patient Identification Numbers will not be accepted as an identifying marker.

Photo ID – Copy of one of the following:

1. State driver’s license, permit, or ID (front & back)
2. Passport
3. VISA photo ID

GED or high school diploma, unofficial college transcripts, or College degree

Proof of COVID19 Vaccination – As mandated by the Governor and the Oregon Health Authority, all healthcare workers receive the vaccine. Since LBCC healthcare students function as healthcare workers in facilities or hospitals, all applicants must upload a copy of a COVID19 vaccination card. The card must list the number of vaccines required depending on vaccine type and include the vaccine manufacturer. For example: 2x Pfizer, 2x Moderna, 1x J&J(Jansseno.sup). **THERE ARE NO EXCEPTIONS TO THIS REQUIREMENT.**

Social Security Numbers will be requested.

If the individual has one of the following, they may reach out to use when they are ready to apply in order for us to create a number to allow them to complete a new registration and apply through the online licensing portal.

If a person contacts us to say they don't have an SSN but they do have a one of the alternative options:

- A current passport and US Visa showing the entitlement to work in the United States such as an H1B Visa
- I-766 or other current federal government form authorizing the individual to work in the US
- If the applicant is attending school on an F1 visa, they must provide a copy of a valid I94 and I20 which has been signed by the designated school authority
- Tax identification number
- Other federally issued identification numbers.

Applicants using one of the above alternatives to a social security number should be aware that they may be required to obtain a US social security number by the time they first renew their license. Therefore, as soon as they obtain it they will need to provide a copy of the SSN card so that we can update our records and allow the individual to complete their renewal.

HOLDS*: Applicants must be in good standing, no registration holds, at LBCC during the entire application and admissions process to be considered for this course.

Final Steps for all applicants accepted to a class:

ADMISSIONS REQUIREMENTS

- 1. Attend the Mandatory Orientation – Due to COVID19 restrictions, this will be a live ZOOM presentation with a date to be determined.**
- 2. Pass a criminal background check (non-refundable once processed) - Must clear the background history by an assigned deadline prior to the beginning of the course.**
- 3 Pass a drug screen (non-refundable once processed) -- Must pass the screen by an assigned deadline prior to the beginning of the course.**

All admitted students will be provided information to complete the post admissions requirements

CANCELLATION: Sessions are subject to cancellation if a minimum number of eligible students are not admitted or due to unexpected circumstances.

Students, not accepted in a term class, must reapply for future sessions.

CIVIL RIGHTS

Request for Special Needs or Accommodations

Direct questions about or requests for special needs or accommodations to the LBCC Director, Center for Accessibility Resources (CFAR), RCH-105, 6500 Pacific Blvd. SW, Albany, Oregon 97321, Phone [541-917-4789](tel:541-917-4789) or via Oregon Telecommunications Relay TTD at [1-800-735-2900](tel:1-800-735-2900) or [1-800-735-1232](tel:1-800-735-1232). Make sign language interpreting or real-time transcribing requests 2-4 weeks in advance. Make all other requests at least 72 hours prior to the event. LBCC will make every effort to honor requests. LBCC is an equal opportunity educator and employer.

LBCC Comprehensive Statement of Nondiscrimination

LBCC prohibits unlawful discrimination based on race, color, religion, ethnicity, use of native language, national origin, sex, sexual orientation, gender, gender identity, marital status, disability, veteran status, age, or any other status protected under applicable federal, state, or local laws. For further information see Board Policy 1015 in our [Board Policies and Administrative Rules](#). Title II, Title IX (employee cases), & Section 504: Scott Rolen, Director of Human Resource Development and Support, CC-108, 541-917-4425; Title IX (student cases): Jill Childress, Manager for Student Conduct and Retention, WH-215, 541-917-4806, LBCC, Albany, Oregon. If you feel you have been discriminated against in any interaction at Linn-Benton Community College, or have been harassed by another person while at LBCC, or wish to report any concern or complaint, please navigate to this page to make a report: linnbenton.edu/report-it. This and additional information can be found at <https://www.linnbenton.edu/about-lbcc/administration/policies/equal-opportunity.php>.

2021 STATEMENT OF UNDERSTANDING AND COMPLIANCE

As a part of the application process, please review the following information you will be required to affirm that you understand the following policies and procedures:

- LBCC's Students Rights and Responsibilities Handbook, including the Standard of Student Conduct located at www.linnbenton.edu/student-rights
- Applicants must comply with all application criteria and deadlines.
- Communication from LBCC regarding your program application will be sent to your LBCC email account. If you do not yet have an LBCC email, LBCC will send information via your personal email until an LBCC email has been assigned.
- Admitted students will be required to pay for and complete the LBCC approved criminal background check. The results will determine, in part, your eligibility to remain in the program but will not guarantee your eligibility to be licensed or employed in this career field.
- Accepted students will have their social security number (SSN) matched against the US Department of Health & Human Services list of individuals who are barred from any participation in federally funded health programs. If on the list, you will not be eligible to participate in this program.
- Admitted students will be required to cooperate with the drug test policies of any work experience, clinical or cooperative teaching site as a condition for continued enrollment in this program and/or related academic courses. A student may be required to comply with the non-LBCC site's policy. Testing may be random and unannounced or conducted when there is reasonable suspicion that performance and/or work behavior may be the result of the presence of a drug. The presence, as determined by the program's test procedures, of prescription or non-prescription drugs, controlled substances or cannabis may result in immediate dismissal from the work site

and disenrollment from the course and/or related academic program if the course is a requirement for program completion. The student may also be subject to appropriate disciplinary action for violating LBCC's Student Standards of Conduct.

➤ Admitted students will be required to pay for, submit proof of, and keep current all post-admission requirements, including TB Test Reports, and CPR certification as per the criteria and deadlines which will be specified in the admission materials.

ONLINE APPLICATION INFORMATION

When applying for the Nursing Assistant Course, you are required to apply online.

To access the application online form click on the following link above.

Application form link will be posted here.

1. Fill in all of the information and upload the pre-requisite documentation as requested to complete your application.

CLASS SELECTION PROCESS:

Applications are accepted on a ***first-come first-served qualified application basis***. It is your responsibility to be informed on and adhere to all requirements, procedures and deadlines as they may change from year to year.

Application Questions

Pauletta, Nursing Assistant Secretary huffmap@linnbenton.edu

Lorraine Lara, Academic Planning Assistant Call 541-917-4923 to make an appointment

Lisa Hoogesteger, Academic Advisor Call 541-917-4780 to make an appointment

¹ Date of Birth (DOB) and Social Security Numbers (SSN) are required to qualify the applicant for Oregon State Board of Nursing Nursing Assistant Certification as per OR Administrative Rule 851-001-0030.

² Once you submit your application a time/date stamp will be applied electronically. If additional information is needed during the application process, the original stamp will remain and you will be contacted by the Nursing Assistant Secretary. Failure to provide accurate information, by the documentation deadline, will result in denial of the application.

Occupational Therapy Assistant - Fall 2022

IMPORTANT NOTE: The Occupational Therapy Assistant Program leadership has decided to accept qualified applications on a SPECIAL FIRST-COME FIRST-SERVED basis to fill a limited number of seats in the Chemeketa Community College and Clackamas Community College Distance Education areas. See page 6 for additional information on the College Partner Areas and the associated advisors. The program is also considering qualified applications from other areas on a first-come first-served basis to be added to the program's cohort area Alternate lists. Alternates are contacted in the event a vacated seat needs to be filled prior to the start of the program.

PROGRAM OVERVIEW: The purpose of this program is to prepare students to function as competent entry-level occupational therapy assistants in a variety of practice settings and to pass the National Board for Certification in Occupational Therapy (NBCOT) examination.

PROGRAM FORMAT: A maximum of 24 students will move through this program as a cohort. Some students will follow a traditional model of attendance at LBCC and others will follow a distance education (DE) model of accessing the OTA program-specific courses at the same time via the internet (see pages 10-11). The curriculum includes classroom, laboratory, and fieldwork components. This is a 6-term, 91-92 credit program designed to be completed within 2 years. Students must fulfill all requirements within 36 months of admission into the program. Students must complete Level II fieldwork within 15 months of completion of the classroom portion of the program. Fieldwork placements are determined by the Academic Fieldwork Coordinator and will depend on availability of sites. Students travel out of their immediate geographic area to a location in the Pacific Northwest for fieldwork rotations and are responsible for all costs related to travel and/or temporary relocation for fieldwork. Depending on enrollment at distance sites or the availability of lab instructors, students may be required to travel to the nearest lab site, which may or may not be at the student's partner college.

ESTIMATED COST: \$25,200.56 (see page 3 for details; subject to increase)

PROGRAM DATES: Fall Term 2022 – Spring Term 2024

2022 MANDATORY INFORMATION SESSION: The 2022 Information Sessions have now closed. The 2023 OTA application bulletin is projected to be available at linnbenton.edu/bulletins in the coming weeks.

UPDATED APPLICATION DATES: Online application opens: **July 5, 2022, midnight**

(Neither early nor late applications will be considered)

Application close date: **September 12, 2022** (*subject to closing earlier if the cohort fills sooner*)

UPDATED APPLICATION DECISION: Emailed to your LBCC email account **during the week of July 25, 2022**

POST-ADMISSION REQUIREMENTS DEADLINE: August 2022 (Date TBA; IMPORTANT information located on page 11)

CLASS SELECTION PROCESS: Apply to one participating college cohort only (see page 6). Admission consideration during this SPECIAL FIRST-COME FIRST-SERVED APPLICATION WINDOW will be based on a first-come first-served basis, and not points. Only qualified applicants will have their applications considered. It is your responsibility to be informed of and adhere to all requirements, procedures and deadlines as they may change from year to year.

NOTE: Not all student Visas allow students to claim USA permanent residential status and/or be admitted to this type of program. International students need to consult LBCC International Admissions to determine whether they are eligible to apply. For more information go to <http://www.linnbenton.edu/international-students>.

CANCELLATION: This program is subject to cancellation if there are an insufficient number of clinical sites and/or eligible students. In the event of cancellation, individuals must re-apply for a later session.

ADMISSION LIMITATIONS

Applicants should be aware of the following Admission Limitations; failure to comply may result in application denial:

- **PREVIOUSLY ADMITTED STUDENTS:** Applicants who have previously been admitted to this program are no longer eligible to apply if they exited the program based on safety concerns or if they exited the program two previous times based on unsuccessful attempts to pass academic and/or clinical requirements not directly related to safety (includes withdrawal in lieu of failing grades).
- **APPLICATION COMPLETION:** Applicants must submit proof of completing all Minimum Application Requirements by the deadlines given to be considered for admission to this program. Applicants are responsible for ensuring LBCC's Admission department has up-to-date transcripts and course information for transfer credits they want considered.
- **HOLDS*:** Applicants must have no registration Holds at LBCC during the entire application and admissions process to be considered for admission to this program.
- **ACADEMIC STANDING*:** Applicants' [Academic Standing](#) must be in Good Standing at LBCC during the entire application and admissions process to be considered for admission to this program.
- **STUDENT STATUS*:** Applicants must be in good Student Status with Student Services at LBCC during the entire application and admissions process to be considered for admission to this program.

* To view your Overall Academic Standing and Student Statuses at LBCC: 1) Log in to WebRunner through [Single Sign-On](#), 2) Select "Student," 3) Select "Student Profile," then 4) Select "Registration Notices" in the upper right corner of the page. Contact your LBCC advisor if you have questions about your status.

NOTE REGARDING FINANCIAL AID: The Federal Financial Aid standards and policies regarding Satisfactory Academic Progress (SAP) are not identical to the college's standards on admission/registration eligibility. Poor Financial Aid SAP status will not limit your potential admission into this program, but may severely affect your funding options. To view your current SAP status: 1) Log in to WebRunner, 2) Select "Financial Aid," 3) Select "Your Financial Aid Status," 4) Select "academic progress." To find out more about applying for Financial Aid through LBCC go to:

<https://www.linnbenton.edu/tuition-and-admission/financial-aid/>

CIVIL RIGHTS

Request for Special Needs or Accommodations

Direct questions about or requests for special needs or accommodations to the LBCC Director, Center for Accessibility Resources (CFAR), RCH-105, 6500 Pacific Blvd. SW, Albany, Oregon 97321, Phone [541-917-4789](tel:541-917-4789) or via Oregon Telecommunications Relay TTD at [1-800-735-2900](tel:1-800-735-2900) or [1-800-735-1232](tel:1-800-735-1232). Make sign language interpreting or real-time transcribing requests 2-4 weeks in advance. Make all other requests at least 72 hours prior to the event. LBCC will make every effort to honor requests. LBCC is an equal opportunity educator and employer.

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<https://www.linnbenton.edu/about-lbcc/administration/policies/equal-opportunity.php>

OCCUPATIONAL THERAPY ASSISTANT PROGRAM ACCREDITATION

This Occupational Therapy Assistant Program is accredited by the Accreditation Council for Occupational Therapy Education (ACOTE) of the American Occupational Therapy Association (AOTA), located at 6116 Executive Boulevard, Suite 200, North Bethesda, MD 20852-4929. ACOTE's telephone number, c/o AOTA, is (301) 652-AOTA, and its web address is www.ACOTEonline.org. Graduates of the program will be eligible to sit for the national certification examination for the occupational therapy assistant administered by the National Board for Certification in Occupational Therapy (NBCOT). After successful completion of this exam, the individual will be a Certified Occupational Therapy Assistant (COTA). In addition, most states require licensure in order to practice; however, state licenses are usually based on the results of the NBCOT Certification Examination. Note that a felony conviction may affect a graduate's ability to sit for the NBCOT certification examination or attain state licensure.

LBCC TUITION & FEES and PROGRAM FEES

THE ESTIMATED COST of the Occupational Therapy Assistant Program is \$25,200.56 (subject to increase). This cost consists of both the estimated LBCC Tuition & Fees and the estimated Program Fees. This program is eligible for Financial Aid, however, Financial Aid may not be used toward paying the \$2,500 deposit. To apply for aid you must file a FAFSA each year and include LBCC as the receiving school (006938). Financial Aid is disbursed in payments each term; students might not receive a Financial Aid credit until a year's entire Program Fees shows a zero balance on their LBCC student account. Books and materials required for degree required courses which do not begin with the "OTA" prefix as well as certification exam fees are NOT included in the estimated cost of the program.

Estimated LBCC Tuition & Fees (\$11,382.16) refer to the cost of the Occupational Therapy Assistant Program specific course credits (all courses with an "OTA" prefix **and** the other degree required courses; as per the [2022-23 Related Instruction and Program Requirements](#) course lists and the 2022-23 In-State [per credit table](#); Out-of-state and Foreign/International per credit tuition is higher; all are subject to increase). For LBCC Tuition & Fee payment information go to: <https://www.linnbenton.edu/about-lbcc/college-services/business-office/>.

Estimated Program Fees (\$13,818.40) refer to the Occupational Therapy Assistant Program's remaining required instructional costs, books, and laboratory fees for required courses with an "OTA" prefix. A payment plan will be available for those who qualify. Students who will be utilizing the Program Fees payment plan will be required to submit a Deferred Note Contract (DNC) and pay the non-refundable \$2,500 deposit. The deposit is due before any financial aid is received. Additional documentation may be required from students receiving Financial Aid and/or other third party tuition assistance awards. Program Fees are divided equally between the first and second academic year. **The second Program Fees payment of \$1,469.74 will be due on October 3, 2022** (subject to increase).

ESTIMATED COST by year (subject to increase):

First-Year Estimated LBCC Tuition & Fees AND Program Fees

| | | |
|---|-------------------------------------|--|
| Year 1 Tuition & Fees (42 cr) = \$5,973.84 | Year 1 Program Fees = \$6,909.20 | YEAR 1 ESTIMATED COST = \$12,883.04 |
|---|-------------------------------------|--|

Second-Year Estimated LBCC Tuition & Fees AND Program Fees

| | | |
|---|-------------------------------------|--|
| Year 2 Tuition & Fees (38 cr) = \$5,408.32 | Year 2 Program Fees = \$6,909.20 | YEAR 2 ESTIMATED COST = \$12,317.52 |
|---|-------------------------------------|--|

RESIDENCY INFORMATION FOR SPECIAL ADMISSION PROGRAMS

For admission to special admission programs, a resident is defined as someone who established permanent residency 90 days before the first day applications are accepted for that program. Permanent residency is defined as the home a person intends to return to after any absence, and in which one's dependents reside for an unlimited period of time. You will be required to provide the following information: legal name, phone number, LBCC student ID or Social Security Number, street address, city, state, ZIP, and time period at the applicable address(es). You may be required to submit additional documentation upon request to show proof of your permanent residence. Misrepresentation of your permanent residence may result in forfeiture of your application status with this program.

2022 OCCUPATIONAL THERAPY ASSISTANT APPLICATION CHECKLIST

If you satisfy the minimum application requirements and do not have any other admission limitations, you will be considered a qualified applicant. During this SPECIAL FIRST-COME FIRST-SERVED application window, qualified applicants will be considered on a first-come first-served basis only. Course numbers noted below refer to LBCC courses in the LBCC Catalog. Summer term enrollment will be accepted pending completion by September 10, 2022. Courses must be completed with a grade of “C” or higher at a regionally accredited institution. Official transcripts from the original institutions are required for proof of transfer course completion. Transfer course equivalency is considered on a case by case basis and is not guaranteed.

| MINIMUM APPLICATION REQUIREMENTS: | |
|-----------------------------------|---|
| | ATI ONLINE TEST OF ESSENTIAL ACADEMIC SKILLS (TEAS; estimated cost \$115) The <u>online</u> TEAS must be completed BY THE ONLINE APPLICATION DEADLINE (see page 1). Follow the TEAS registration instructions located at: https://tinyurl.com/OTALBCCTEAS to have your test completion scores sent to LBCC for review. The TEAS may be taken twice per 12-month period. |
| | MANDATORY INFORMATION SESSION (see page 1 for the link to the online version of the Mandatory Information Session) NOTE: Submission of the online form is required following completion of session. |
| | CHECK FOR ADMISSION LIMITATIONS (see page 2) |
| | SUBMIT OFFICIAL TRANSCRIPTS from all non-LBCC institutions (www.linnbenton.edu/transcripts) |
| | ONLINE APPLICATION (see page 5) |
| | ONLINE SUPPLEMENTAL INFORMATION FORM After completing the online application, a link to the Online Supplemental Information Form will be sent to applicants via email within 1-3 business days. The following information and documentation will be required. |
| | ➤ Distance Education Advisor Meeting form , if applicable (see page 6) |
| | ➤ Essential Skills for the Occupational Therapy Assistant Program form (see page 7) |
| | ➤ Understanding and Compliance (see page 8) |
| | ➤ Minimum Application Requirement Courses. You will be required to supply the course number, institution name, year of completion, and grade received for each. |
| | WR 121 - English Composition |
| | MTH 075 <u>or</u> MTH 098 <u>or</u> higher Math credits - completed since September 2017* |
| | BI 102 <u>or</u> BI 112 <u>or</u> BI 212 <u>or</u> BI 221 - Human cellular biology course with lab (animal biology will not suffice) |
| | PSY 201 <u>or</u> PSY 202 - General Psychology |
| | CRS 131 – Medical Terminology 1 (NOTE: AH 111, CMA 101, <u>or</u> MO5. 630 are also acceptable) |

* IF math credits are at or above the required skill level but are older than 5 years, an **LBCC** Math Placement Test into or above MTH 095 within the last 5 years and achieved BY THE ONLINE APPLICATION DEADLINE (see page 1) may be used in conjunction with the older math credits. Placement Tests and Waiver Exams must be processed through [LBCC Student Assessment](#). “Self” Placement will not be considered in this application.

Application Questions

Lorraine Lara

Academic Planning Specialist

HealthcarePrograms@linnbenton.edu

ONLINE APPLICATION INFORMATION

When applying for the Occupational Therapy Assistant Program you are required to apply online. **The Special First-Come First-Serve application cycle** will open online on JULY 5, 2022 at midnight. Online applications receive an automatic time/date stamp once submitted.

Online Application Instructions:

1. Go to <http://www.linnbenton.edu/apply>
2. Select **“See Steps to Apply”**
3. Select **“High school graduates without some previous college credit”**
- or - **“High school graduates with some previous college credit”**
4. Select **“Create a WebRunner Account”**
5. Select **“Show Application Form”**
6. Create your **Login ID**, your **PIN**, and verify your **PIN**
7. Select **“Login”**
8. Select the **OTA Program** from the Application Type drop down options (See **NOTE** below)
9. Select **“Continue”**
10. Select **“Fall 2022”** from the Admission Term drop down options
11. Enter at least your **first** and **last name** into the appropriate boxes
12. Select **“Fill Out Application”**
13. Complete all online application checklist items:
 - ✓ Name
 - ✓ Permanent Address
 - ✓ Personal Information¹
 - ✓ Mailing Address, if different from permanent
14. Select **“Application is Complete”**²

RETURNING/EXISTING LBCC STUDENTS: Log in to your WebRunner account, select the **“Student”** tab, select **“Admissions”**, select **“Apply with an online application”**, select **“New”** to create a new application, and then, *beginning at step 8*, follow the rest of the above online application steps. (See **NOTE** below)

NOTE: Selecting any other application type will prevent you from being able to proceed through this program’s application processes, thus may forfeit your admission consideration. If you are applying within the appropriate application dates but are unable to view this program on the Application Type drop down list, create a new application by starting at Step 1 (using a new Login ID and password). Be sure to select the appropriate program type from the drop down list. Do NOT select *A New Student* nor *Transfer Student*.

Remember: After completing the Online Application for Admission you will receive an email with a link to the Online Supplemental Information Form with a response deadline included. See pages 3 - 4 and pages 6 - 8 for additional information.

Tips: ¹ Date of Birth (DOB) and Social Security Numbers (SSN) are used, in part, to help ensure applications are not mismatched between LBCC applicants with the same names. During this step of the application process entry of DOB will be required and entry of SSN will be optional. Both may be required for other admission requirements.

² Once you submit your application a time/date stamp will be applied electronically. If additional information is needed to process your online application, you will be contacted by a staff member from the Admissions department. Failure to provide accurate information will result in your application being delayed and may result in it being denied.

DISTANCE EDUCATION ADVISOR MEETING CONFIRMATION FORM

Applicants choosing to apply toward one of the Distance Education (DE) Participating College areas will be REQUIRED to show proof of meeting with that college's listed contact. Meeting verification **must** be documented using this form. To submit the form, an electronic copy of the completed form must be uploaded during your completion of the Online Supplemental Information Form submission (see page 3). In-person appointments often must be made at least 2-3 weeks in advance. Falsifying this document in any way is grounds for admission denial.

- - - This form is to be completed by the DE Participating College advisor with whom the applicant has met - - -

Applicant's Name: _____ Participating College: _____

Advisor's Name: _____ Meeting Date: _____

Advisor's Signature: _____

2022 OCCUPATIONAL THERAPY ASSISTANT - PARTICIPATING COLLEGE CONTACTS

Applicants are only allowed to select ONE of the following participating college cohorts on their application. For application questions please contact the application advisor listed under the partner college area toward which you plan to apply. All applicants, including Distance Education (DE) applicants, are required to utilize the application steps and criteria outlined in this bulletin.

IMPORTANT NOTE: The number of students admitted to each participating college cohort may vary from year to year. The variation is due in part to the number of qualified applicants within each area and where in the Pacific Northwest the program is able to confirm fieldwork rotations. Due to such variables, all admitted students are required to travel out of their immediate geographic area to a location in the Pacific Northwest for fieldwork rotations and/or lab instruction. Admitted students are responsible for all costs related to travel and/or temporary relocation. Program processes determine student placements for labs and fieldwork rotations, and students may not switch outside those processes.

LINN-BENTON COMMUNITY COLLEGE (Traditional)

Academic Planning Specialist: Lorraine Lara
HealthcarePrograms@linnbenton.edu
541-917-4923

CENTRAL OREGON COMMUNITY COLLEGE (DE)

Advisor: Diana Kalanquin
dlkalanquin@cocc.edu
541-383-7286

CLACKAMAS COMMUNITY COLLEGE (DE)

Advisor: Phil Reid
philr@clackamas.edu
503-594-0623

OREGON COAST COMMUNITY COLLEGE (DE)

Advisor: Carol Martin
carol.martin@oregoncoast.edu
541-867-8521

SOUTHWEST OREGON COMMUNITY COLLEGE (DE)

Advisor: Susan Stuntzner
susan.stuntzner@socc.edu
541-888-1578

BLUE MOUNTAIN COMMUNITY COLLEGE (DE)

Advisor: Bryant Cardenas
bcardenas@bluecc.edu
541-278-5932

CHEMEKETA COMMUNITY COLLEGE (DE)

Advisor: Mike Zunin
mike.zunin@chemeketa.edu
503-399-6560

CLATSOP COMMUNITY COLLEGE (DE)

Advisor: Cole Evans
cevens@clatsopcc.edu
503-338-7679

ROGUE COMMUNITY COLLEGE (DE)

Advisor: Donna D'Inzillo (updated)
ddinzillo@roquecc.edu
541-956-7145

TILLAMOOK BAY COMMUNITY COLLEGE (DE)

Advisor: Mary King (updated)
maryking@tillamookbaycc.edu
503-842-8222, ext. 1075

ESSENTIAL SKILLS FOR THE OCCUPATIONAL THERAPY ASSISTANT PROGRAM

Listed below are essential skills that a student should possess in order to progress satisfactorily through the OTA curriculum. A prospective student with a disability that is concerned that the disability may impact his or her ability to perform one or more of these skills, provide patient care, or participate in other job activities, is encouraged to contact **the Center for Accessibility Resources**, <https://www.linnbenton.edu/cfar>.

CRITICAL THINKING SKILLS: The OTA student must possess critical thinking skills sufficient for clinical judgment. The OTA student must be able to think independently and use the OT process as a basis for solving client problems, such as identifying cause and effect relationships in clinical situations, developing appropriate interventions, exercising good judgment, and safely and effectively providing treatment.

INTERPERSONAL SKILLS: The OTA student must possess interpersonal and self-management skills sufficient to develop positive and effective relationships with individuals, families and groups from a variety of social, emotional, cultural and intellectual backgrounds. The OTA student must be able to establish therapeutic relationships with patients, families and significant others. The OTA student must perform effectively under stress and demonstrate flexibility.

COMMUNICATION SKILLS: The OTA student must possess communication skills sufficient for interaction with clients, caregivers and other professionals in verbal and written form. The OTA student must be able to effectively report and document clinical observations, provide client and caregiver instruction, gather data through interviewing, participate in team meetings and provide in-service presentations.

TECHNOLOGY SKILLS: The OTA student must possess the technology skills needed for effective communication with staff, supervisors, and other professionals. The OTA Student must be able to compose and respond appropriately to email, be able to create and save documents using Microsoft Word, and create slide presentations using PowerPoint. The OTA student must be able to open and read PDF documents as well as be able to scan documents and save as a PDF document. The OTA student must be able to create short videos as needed for class assignments.

MOBILITY SKILLS AND STAMINA: The OTA student must possess physical skills sufficient to maneuver throughout the facility and within small spaces to provide effective intervention. The OTA student must be able to move around in patient rooms, bathrooms and other workspaces to provide effective treatment implementation. The OTA student must be able to judge distance/ surface change/ depth in order to assist clients ambulating on various surfaces. The OTA student must also be able to position, transfer, and transport clients, provide contact guard assistance, and demonstrate physical endurance adequate for the workplace.

MOTOR SKILLS AND BALANCE: The OTA student must possess gross and fine motor skills sufficient to function as an OTA. The student must be able to use equipment, fabricate and use adapted devices, fabricate splints and utilize fine motor activities in client treatment as required by the work site. The OTA Student will be expected to regularly lift and/or move objects ranging from 10 to 50 pounds and routinely lift/move objects greater than 50 pounds using proper body mechanics (i.e. during patient transfers). The OTA student must be able to maintain balance during guarding of unstable clients and maintain balance during lifting/ pivoting of unstable clients.

AUDITORY SKILLS: The OTA student must possess auditory skills sufficient to monitor and assess client needs. The OTA student must be able to hear and recognize monitor alarms, emergency signals, auscultatory sounds (breath and heart sounds) and cries for help.

OBSERVATION AND VISUAL SKILLS: The OTA student must possess visual skills sufficient for observation and assessment necessary in OTA practice. The OTA student must be able to observe patient/client responses to treatment and assess the client's condition including inspecting skin, color, odor, motor function and taking accurate vital signs. , see a change in skin color and be able to detect calibrations on equipment.

TACTILE AND SENSORY SKILLS: The OTA student must possess tactile skills sufficient for physical assessment. The OTA student must be able to perform palpation, functions of physical examination, such as manual muscle testing, and/or functions related to therapeutic intervention. The OTA student must be able to detect safe heat levels on various appliances and tools (e.g. stove, heat gun, etc.).

With my signature below I verify that I have read and fully understand the Essential Requirements for the Occupational Therapy Assistant Program. I also understand that if I have a disability requiring an accommodation in any of the above skill areas, that it is my responsibility to contact the Center for Accessibility Resources (see page 2) **apply and complete the accommodation process**, to determine whether a suitable accommodation can be made that would enable me to effectively provide occupational therapy services.

Applicant Legal Name (Print): _____

DATE: _____

Applicant Signature: _____

2022 STATEMENTS OF UNDERSTANDING AND COMPLIANCE

When applying to this program, you will be required to affirm that you understand all of the following:

- **The State of Oregon Occupational Therapy Licensing Board (OTLB) is authorized to require applicants to provide their Social Security Number.** Questions should be directed to the OTLB at: 800 NE Oregon St. Suite 407, Portland OR, 97232, 971-673-0198.
- **Eligibility for registration by the National Board for Certification in Occupational Therapy (NBCOT) following graduation may be restricted if you have been charged with or convicted of a misdemeanor or felony.** If you have questions about your eligibility, it is recommended to contact the NBCOT (www.oregon.gov/OTLB/index.shtml) prior to applying to this program.
- Students admitted to this program must be the age of 18 or older prior to the scheduled start date.
- Applicants who were previously admitted to this program are no longer eligible to apply IF they exited the program based on safety concerns or IF they exited the program two previous times based on unsuccessful attempts to pass academic and/or clinical requirements not directly related to safety (includes withdrawal in lieu of failing grades).
- LBCC's Student Right to Know information located at www.linnbenton.edu/student-rights
- Admission Limitations, Financial Aid's Satisfactory Academic Progress, and Student Civil Rights outlined on page 2.
- Applicants may only apply toward one partner college area cohort (see page 6)
- Applicants must comply with all application criteria and deadlines outlined in this bulletin.
- Communication from LBCC regarding your program application will be sent to your LBCC email account. If you do not yet have an LBCC email, LBCC will send information via your personal email until an LBCC email has been assigned.
- Some occupational health hazards in this program include heavy lifting, exposure to bodily fluids and the use of latex gloves and masks. Meet with the Occupational Therapy Assistant Program Administrator if you feel you have any risk factors to consider.
- Admitted students will be required to meet the program's technical requirements prior to the start of the program (see pages 9-10). The responsibility for gaining and maintaining access to the required technology is yours.
- Admitted students may be required to travel to the nearest lab site, which may or may not be in your immediate geographic area.
- Admitted students will be required to travel out of your immediate geographic area to a location in the Pacific Northwest for fieldwork rotations, and you will be responsible for all costs related to travel and/or temporary relocation for Fieldwork.
- Lab locations and fieldwork assignments are determined by the program. Admitted students will NOT be allowed to change their lab location and/or fieldwork assignments outside the established program processes.
- If you are suspected of or known to have a communicable disease which may be transmitted under normal Occupational Therapy Assistant Program activities, you will be required to have documentation of completing medical treatment prior to participating in clinical/lab assignments.
- Admitted students will be required to complete all LBCC admissions processes and graduation requirements.
- Admitted students will be required to complete and pass all post-admission requirements by the deadlines which will be specified in the admission materials.
- Admitted students will be required to pay for and clear the LBCC approved criminal background checks, one the first year and another the second year. The results will determine, in part, eligibility to remain in the program but will not guarantee eligibility to be licensed or employed in this career field. Neither previously completed nor alternative background checks will suffice.
- If admitted, your social security number (SSN) will be matched against the US Department of Health & Human Services list of individuals who are barred from any participation in federally funded health programs. If on the list, you will not be eligible to participate in this program.
- Admitted students will be required to cooperate with the drug testing policies of the program as well as any clinical experience or cooperative teaching site as a condition for continued enrollment in the course and/or related academic program. You may also be required to comply with a non-LBCC site's policy. Testing may be random and unannounced or conducted when there is reasonable suspicion that performance and/or behavior may be the result of the presence of a drug. The presence, as determined by the program approved test procedures, of prescription or non-prescription drugs, controlled substances or cannabis may result in immediate dismissal from the work site and disenrollment from the course and related academic program. You may also be subject to appropriate disciplinary action for violating the Standards of Conduct as noted in LBCC's Student Right to Know.
- Admitted students will be required to pay for, submit proof of, and keep current the required immunizations, medical screens, and CPR certification as per the criteria and deadlines which will be specified in the admission materials.
- Admitted students will be required to submit proof of being fully vaccinated for COVID-19 as one of the post-admission requirements. "Fully vaccinated" means two weeks post vaccination completion. Completion deadline to be determined. At this time, exemptions are not being considered by our clinical partner healthcare sites for students who will have direct patient contact.
- Admitted students will be required to maintain a minimum "C" grade in all Occupational Therapy Assistant theory courses to remain in the program.
- Admitted students will be required to maintain a minimum "C" grade in all other degree course requirements, and courses must be taken in the specified sequence.
- Admitted students will be required to complete all requirements for an Associates of Applied Science in Occupational Therapy Assistant degree as per the year and term you are admitted to the program to be eligible for graduation upon completion.

OCCUPATIONAL THERAPY ASSISTANT PROGRAM TECHNICAL REQUIREMENTS

Linn-Benton Community College offers both a “traditional” instructional format and a “distance education” format for Occupational Therapy Assistant. This hybrid design uses a combination of clinical instruction, online courses in LBCC’s eLearning System, and live lecture within the virtual classroom environment to help both traditional and distance education students achieve their learning goals. Homework, assignments, and “online” resources will be available via the course management system. Additional resources for distance education students are available through their partner community college. For learning to occur, all learners must actively participate in class discussions, online forums, and be responsible for completing the designated activities/assignments within the prescribed timelines. All traditional and distance education students in the Occupational Therapy Assistant Program must meet all technical requirements, including access to high speed internet services, to successfully complete the program (See technical requirements and skills necessary for web-based instruction below).

DESCRIPTION OF INSTRUCTIONAL METHODS FOR TRADITIONAL AND DISTANCE EDUCATION STUDENTS:

COVID-19 Update: *In the event of continued social distancing restrictions it is possible that meetings which are typically held in-person (ex: orientation, midterms, final exams, etc.) could be held online and/or relocated. The program will share more specific meeting and class format updates with admitted students.*

Course lectures: All occupational therapy assistant students receive instruction that is delivered via a web-based conferencing platform accessed through the Learning Management System. Traditional students attend classes in-person at the Healthcare Occupations Center campus in Lebanon and distance education students receive academic instruction online. This education is provided through a variety of learning technologies which include streamed video and audio, email, web-conferencing, video conferencing, and virtual classroom. Both traditional and distance students will be required to travel to Lebanon a minimum of 2-3 times per term for midterm and final exams.

Skills lab: Lab instruction is provided by skilled clinicians who serve as lab instructors and includes hands-on demonstration of skills and techniques related to content of courses. Skills lab is offered in spring term of the first year and in the fall term of the second year. Traditional students attend skills lab onsite at the Lebanon campus. Distance education lab locations will be determined in part on applicant numbers and availability of lab instructors/space. Distance Education students may be required to travel to the nearest lab site, which may or may not be at the student’s partner college.

Fieldwork education: Level I and Level II Fieldwork provides students with hands-on application of theory and demonstration of skills from all instructional methods. Students will complete program specific competencies in the clinical setting.

LEARNERS MUST COMPLETE A VARIETY OF ACTIVITIES:

- Read and view information resources online
- Participate in the class discussion questions using the online forum
- Interact with fellow learners and the instructor in a respectful manner
- Complete exercises and homework as assigned by the designated due date
- Participate equally in the completion of team projects
- Take quizzes and tests online
- Attend and participate in live lecture in real time via the virtual classroom

TO BE ABLE TO PARTICIPATE AS AN ACTIVE LEARNER, YOU MUST MEET THESE TECHNICAL PREREQUISITES:

- Basic familiarity with computers and the web environment
- Access to reliable DSL or broadband / high-speed internet via your own Internet Service Provider (ISP). You need an ISP that seldom times-out or drops your connection.

- Have multiple web browsers. Specifics will be provided upon admittance. (Example: Chrome and Firefox)
- Ability to read and print online documents
- Ability to type responses and to post to the online learning environment
- Allocation for the time required to complete the online activities of this program
- Have access to and be skilled in the use of Microsoft Word and PowerPoint
- Ability to attach and email Word documents
- Ability to scan and upload documents
- Ability to use other applications in the Microsoft Office Suite is desirable
- Access to a reliable web camera and separate headset with microphone
- Ability to record, edit, and upload video assignments

TO ACCESS THE ELEARNING SYSTEM YOU MUST HAVE ACCESS TO THE FOLLOWING EQUIPMENT:

- Internet Access/Software:**
 - **High Speed Internet** –LBCC does not provide home internet access.
 - **Email** – Once admitted to the program you must use your LBCC Email account (powered by Google) for all program communication. <http://www.linnbenton.edu/lbcc-email>
 - **Web Browser** – For PC computers: Chrome, Internet Explorer, or Firefox may be used. For Mac computers: Chrome or Firefox is recommended as there may be issues with Safari and Internet Explorer. Browsers must be kept updated. Note: Pop-up windows, ActiveX and cookies must be enabled in any browser. If applicable, your firewall settings must allow you access to LBCC’s eLearning Systems.
 - **Adobe Acrobat Reader** (pdf files) – must be kept updated updated
 - **Google Apps** – to edit and view documents from any computer, tablet, or smartphone; basic familiarity prior to joining the program is strongly encouraged.
- Computer Hardware:**
 - **Computer** – You will need access to a computer equipped with Windows 8 or higher or a Macintosh computer running System OS X 10.6 or higher
 - **Processor** – Recommended: Pentium dual-core (Windows), or Mac processor (G5 or Intel); 1GHz or better.
 - **Screen Resolution** – Minimum of 800 x 600 @ thousands of colors
 - **Memory** - Minimum of 128 MB of RAM; 256 is better, 512 or greater would be best
 - **Hard Drive Space** – Enough to store files on your computer as needed
 - **Modem** – You must have access to high speed internet. (Note: Drops in connections may require you to reconnect to your online course. A time out of four hours of inactivity is standard. If you experience frequent drops in service, check with your ISP for solutions.)
 - **Webcam/Headset/Microphone** – ALL STUDENTS (traditional and distance) will need a webcam and separate headset with microphone to participate in the virtual classroom.
 - **16 GB Flash Drive**

VIDEO CAMERAS: Both traditional and distance education students are required to submit select assignments via audio-video recording. Students may use their own video camera or check one out from the OTA department (if checked out from the OTA department, device instructions will be provided, and responsibility for the device will be assumed by the student during the time they have the device reserved).

NOTE: Please realize that despite meeting all technical recommendations you may still encounter difficulty accessing course content from your computer. It is required that you locate an alternate computer to use and have a plan for backup technical support in case you encounter difficulties which cannot be resolved with your instructor and LBCC Support Services. **Personal computer problems will not be an acceptable excuse for not completing coursework on time.**

POST-ADMISSION REQUIREMENTS

Please do not turn in proof of the items listed below with your application packet. Only students who are admitted to this program will be required to complete all Post-Admission Requirements. Additional instructions will be provided with the admission offer emails. The estimated costs of the following are NOT included in the cost of program tuition and fees. The following are subject to change:

- **SUMMER TERM COMPLETION:** If applicable, submit proof of Summer term minimum application course completion with a “C” grade or better. If completed at another institution, official transcripts are required.
- **REGISTRATION:** Register to complete COMM 218 (Interpersonal Communication) by December 2022
- **DEFERRED NOTE CONTRACT (DNC):** DNCs set up a payment plan for paying the Program Fees (see page 3)
- **DEPOSIT:** Pay your non-refundable deposit of \$2,500 (subject to increase)
- **FIRST-YEAR CRIMINAL BACKGROUND CHECK:** Passing the LBCC approved 1st-Year criminal background check will be required (estimated cost is \$66)
- **DRUG TEST:** Passing the LBCC approved drug test will be required (estimated cost is \$55)
- **MANDATORY ORIENTATION:** Attend the September Mandatory Orientation (location/date/time TBA)
- **TECHNICAL REQUIREMENTS:** Meet the technical requirements prior to the start of the program. The responsibility for gaining and maintaining access to the required technology is that of the student’s.
- **ADMISSION FEE:** Students who have never paid the admission fee will be required to prior to program start
- **FIRST-YEAR HEALTH DOCUMENTATION:** Electronically submit the appropriate health documentation (estimated document tracker cost is \$43; cost of immunizations and medical screenings vary).
 - **Positive Hepatitis B surface antibody titer*** – blood test; vaccinations alone do NOT meet this criteria
NOTE: EARLY ACTION ON THIS ITEM IS REQUIRED. COMPLETION OF THE REQUIRED VACCINES AND REQUIRED ANTIBODY TEST CAN TAKE 6-8 MONTHS. It is recommended to have official proof of your entire HepB vaccination series completion prior to applying to this program. Proof of the entire HepB vaccination series AND the follow-up HepB Surface Antibody Titer will be required by July 2022. In the event of a NON-positive Antibody Titer proof of the original vaccine series, of the NON-positive titer, AND new HepB vaccines must be submitted by August 30, 2022. Additional documentation may be required. **NO EXCEPTIONS.**
 - **MMR (Measles, Mumps, Rubella)*** – positive antibody titers for all three components or 2 vaccines
 - **Varicella (Chicken Pox)*** – positive antibody titer or 2 vaccines
 - **Tdap (Tetanus, Diphtheria and Pertussis)*** – 1 dose within the last 10 years and updated every 10 years
 - **COVID-19*** – proof of being fully vaccinated; documentation must include the vaccine manufacturer(s)
- **ADDITIONAL COSTS:** Admitted students will receive additional details. Student costs may include the completion of a N-95 mask Fit screen/test through an Occupational Medicine facility (est. cost: \$70 - \$275).
- **RECOMMENDED IMMUNIZATIONS*:** Some clinical sites in Oregon may require one or both of the following immunizations for student clinical placement acceptance so choosing not to complete these might result in fewer clinical placement options while in the program. (costs vary)
 - **Flu shot** – Current influenza vaccine & updated annually
 - **Polio** – positive antibody titers or 3 vaccines
- **SECOND-YEAR DOCUMENTATION:** Second-Year students will be required to electronically submit proof of the following (deadline TBA; costs vary).
 - **Negative Tuberculosis (TB) test*** – Negative QuantiFeron Gold blood test or Negative 2-Step TB skin test (consists of two separate Negative TB skin tests completed 1-3 weeks apart); updated annually
 - **CPR** – ONLY American Heart Association’s (AHA) BLS Provider CPR certification will be accepted. Other CPR certifications, even through AHA, will be denied. CPR certification must be kept current
 - **2nd-Year OSP Criminal Background Check** – Following successful completion of the first year in the program, students will be required to complete and clear a second criminal background check.

* Documentation must be either a copy of an official immunization card or original immunization/medical screening document. Documentation must include: 1) Your name, 2) Date of Birth, 3) Name of administering Agency or provider, 4) Name of injection, test, etc., and results, if applicable, 5) Date of injection, test, etc., 6) Healthcare Provider’s signature, official stamp or letterhead.

Phlebotomy - *FALL 2022*

PROGRAM OVERVIEW: A phlebotomist collects blood samples from patients, processes physician orders for laboratory testing, represents the laboratory in a professional manner to patients and staff and effectively communicates in the care and support of the patient. This training results in skills necessary to work successfully as a phlebotomist. Skill areas covered are: Medical Terminology, Basic Anatomy and Physiology, Customer Service, Medical Law and Ethics, Phlebotomy (vacuum collections, arterial specimen collection, devices, syringes, capillary skin punctures, butterfly needles, blood cultures and specimen collection on adults, children and infants) and a clinical practicum. The program prepares students for certification examinations by the American Society of Clinical Pathologists and the National Accrediting Agency for Clinical Laboratory Sciences.

PROGRAM FORMAT: A group of up to 15 students will move through this training as a cohort. Students attend class for approximately 35 hours a week and complete 25 credits. Classes are projected to be held primarily online with some classes taking place at LBCC's Healthcare Occupations Center. Classes are expected to run between 9am and 4pm, Monday through Friday.

Good visual acuity including color perception is vital to phlebotomy. Frequent lifting and carrying of light equipment less than 10 pounds as well as exposure to infection from disease bearing specimens and to odorous chemicals and specimens should be expected.

For additional information visit: www.linnbenton.edu/phlebotomy.

ESTIMATED PROGRAM FEES: \$5,550 (subject to increase; see page 6 for additional information)

PROGRAM DATES: **September 26, 2022 – January 6, 2023** (end date TBA)

MANDATORY ONLINE PRE-APPLICATION INFORMATION SESSION: www.linnbenton.edu/phlebotomy

APPLICATION DATES: Online application opens: **July 11, 2022, 9:00 AM**

(Early applications will not be considered)

Application close date: **September 12, 2022** (*subject to closing earlier if the cohort fills sooner*)

APPLICATION DECISION: Application decision emails will begin to go out during **the week of July 25, 2022**

POST-ADMISSION REQUIREMENTS DEADLINE: **September 12, 2022** (see last page for important information)

MANDATORY ORIENTATION: **September 16, 2022, 2:00 - 4:00 PM** (location TBD)

CLASS SELECTION PROCESS: Applications are considered on a first-come first-served basis with preference given to residents of the Linn-Benton Community College (LBCC) Tax District within the dates noted below. It is your responsibility to be informed on and adhere to all requirements, procedures and deadlines as they may change from year to year. All applicants who want to be considered for admission must complete the entire application process. **Cancellation:** Sessions are subject to cancellation if a minimum number of eligible students are not admitted. Students must reapply for later sessions.

Resident Priority will be first given to qualified applicants who are residents of the Linn-Benton Community College tax district followed by in-state, out-of-state and then international applicants between July 11 - 15, 2022. After these dates Resident Priority will no longer be considered. To determine whether or not you live at such an address (whether you rent or own), refer to the property tax statement, or inquire at your county tax assessor's office. Some addresses at or near the Linn or Benton county lines, though within county lines, might not be within LBCC's district. **NOTE:** Not all student Visas allow students to claim USA permanent residential status and/or be admitted to this program. International students must consult LBCC International Admissions to see if they are eligible to apply: <http://www.linnbenton.edu/international-students>.

NONDISCRIMINATION STATEMENT

LBCC Comprehensive Statement of Nondiscrimination

Linn-Benton Community College does not discriminate based on race, color, religion, ethnicity, use of native language, national origin, sex, sexual orientation, gender, gender identity, marital status, disability, veteran status, age, or any other status protected under applicable federal, state, or local laws in its programs or activities. For further information see Board Policy 1015 and Administrative Rule 1015-01. The following staff members have been designated to handle inquiries regarding the nondiscrimination policies:

For concerns or inquiries regarding disability accessibility and accommodations:

Contact: Carol Raymundo, Director of Center for Accessibility Resources

RCH-101, Albany Campus, Albany, OR 97321

(541) 917-4789

raymundo@linnbenton.edu

For concerns or complaints about the College or an LBCC staff member:

Contact: Scott Rolens, Director of Human Resource Development and Support and Title IX Coordinator

CC-108, Albany Campus, Albany, OR 97321

(541) 917-4425

rolens@linnbenton.edu

For concerns or complaints about a student:

Contact: Jill Childress, Manager for Student Conduct and Retention and Title IX Coordinator

WH-215, Albany Campus, Albany, OR 97321

(541) 917-4806

childrj@linnbenton.edu

Request for Special Needs or Accommodations

Direct questions about or requests for accommodations to the Center for Accessibility Resources, 541-917-4789 or cfar@linnbenton.edu at least three business days in advance for special events and as soon as possible for classroom or other emerging requests. LBCC will make every effort to honor requests. LBCC is an equal opportunity educator and employer.

ADMISSION LIMITATIONS

Applicants should be aware of the following Admission Limitations; failure to comply may result in application denial:

- **PREVIOUSLY ADMITTED STUDENTS:** Applicants who have previously been admitted to this program are no longer eligible to apply if they exited the program based on safety concerns or if they exited the program two previous times based on unsuccessful attempts to pass academic and/or clinical requirements not directly related to safety (includes withdrawal in lieu of failing grades).
- **APPLICATION COMPLETION:** Applicants must submit proof of completing all Minimum Application Requirements by the deadlines given to be considered for admission to this program. Applicants are responsible for ensuring LBCC's Admission department has up-to-date transcripts and course information for transfer credits they want considered.
- **HOLDS*:** Applicants must have no registration Holds at LBCC during the entire application and admissions process to be considered for admission to this program.
- **ACADEMIC STANDING*:** Applicants' [Academic Standing](#) must be in Good Standing at LBCC during the entire application and admissions process to be considered for admission to this program.
- **STUDENT STATUS*:** Applicants must be in good Student Status with Student Services at LBCC during the entire application and admissions process to be considered for admission to this program.

* To view your Overall Academic Standing and Student Statuses at LBCC: 1) Log in to WebRunner through [Single Sign-On](#), 2) Select "Student," 3) Select "Student Profile," then 4) Select "Registration Notices" in the upper right corner of the page. Contact your LBCC advisor if you have questions about your status.

NOTE REGARDING FINANCIAL AID: The Federal Financial Aid standards and policies regarding Satisfactory Academic Progress (SAP) are not identical to the college's standards on admission/registration eligibility. Poor Financial Aid SAP status will not limit your potential admission into this program, but may severely affect your funding options. To view your current SAP status: 1) Log in to WebRunner, 2) Select "Financial Aid," 3) Select "Your Financial Aid Status," 4) Select the Aid Year. To find out more about applying for Financial Aid through LBCC go to: <https://www.linnbenton.edu/tuition-and-admission/financial-aid/>

RESIDENCY INFORMATION FOR LIMITED ENROLLMENT PROGRAMS

For admission to limited enrollment programs, a resident is defined as someone who established permanent residency 90 days before the first day applications are accepted for that program. Permanent residency is defined as the home a person intends to return to after any absence, and in which one's dependents reside for an unlimited period of time. As part of the Online Supplemental Information Form you will be required to submit information regarding your residency for the entire 90 day period leading up to the application. Information you will be required to provide includes legal name, phone number, LBCC student ID or Social Security Number, program of choice, street address, city, state, ZIP, and time period at the applicable address(es). You may be required to submit additional documentation upon request to show proof of your permanent residence. Misrepresentation of your permanent residence may result in forfeiture of your application status with this program. **NOTE:** Not all student Visas allow students to claim USA permanent residential status and/or be admitted to this program. International students need to consult International Admissions to see if they are eligible to apply. Go to <http://www.linnbenton.edu/international-students> for more information.

2022 PHLEBOTOMY MINIMUM APPLICATION REQUIREMENTS

If you satisfy the minimum application requirements and do not have any other admission limitations, you will be considered a qualified applicant. Course numbers noted below refer to LBCC courses as described in the LBCC Catalog. Summer term enrollment (pending completion by September 9, 2022) and/or placing **above** the courses on the LBCC Placement Tests (www.linnbenton.edu/student-assessment) will be accepted. Courses must be completed with a grade of “C” or higher at a regionally accredited institution. Placement/Waiver Tests must be taken prior to program application. College course completion through NON-LBCC institutions must be proven through official transcripts from the original institution(s) where each applicable course was completed. Transfer course equivalency is considered on a case by case basis and is not guaranteed.

| | |
|--|---|
| | MANDATORY PRE-APPLICATION INFORMATION SESSION: www.linnbenton.edu/phlebotomy (select the Information Session link on the left side of the page). All applicants must complete the 2021-22 online information session prior to applying to this program. |
| | CHECK FOR ADMISSION LIMITATIONS (see page 2) |
| | SUBMIT OFFICIAL TRANSCRIPTS from all non-LBCC institutions (www.linnbenton.edu/transcripts) NOTE: <u>Unofficial</u> transcripts will NOT be accepted to show proof of course completion. |
| | ONLINE APPLICATION (see page 4) |
| | ONLINE SUPPLEMENTAL INFORMATION FORM After completing the online application, a link to the Online Supplemental Information Form will be sent to applicants via email within 1-3 business days. Information regarding the following will be required to be provided within that form. NOTE: Applicants will be required to supply the following for each course: course number, college or university where each course was completed, month and year course was completed, and the grade received. |
| | ➤ Residency (see page 5) |
| | ➤ Understanding and Compliance (see page 5) |
| | ➤ Minimum Application Requirement Courses |
| | CS 120 - Digital Literacy* |
| | WR 095 - College Writing Fundamentals** |

* Successfully passing LBCC’s CS 120 Waiver Exam PRIOR TO APPLYING TO THIS PROGRAM may be used to meet the Digital Literacy requirement (www.linnbenton.edu/student-assessment).

** Successfully placing **above** this course via the LBCC Placement Tests PRIOR TO APPLYING TO THIS PROGRAM may be used to meet the Minimum Application Requirement (www.linnbenton.edu/student-assessment). “Self” Placement will not be considered in this application.

Application Questions

Lorraine Lara

Academic Planning Specialist

HealthcarePrograms@linnbenton.edu

CANCELLATION: Sessions are subject to cancellation if a minimum number of eligible students are not admitted. Students of canceled sessions must reapply for later sessions.

ONLINE APPLICATION INFORMATION

When applying for the Phlebotomy Program, you are required to apply online. Applications will open online on July 11, 2022 at 9:00 am. Online applications receive an automatic time/date stamp. Early applications will not be considered. Resident Priority ends July 15, 2022 at midnight. Application close date to be determined.

Online Application Instructions:

1. Go to <http://www.linnbenton.edu/apply>
2. Select “See Steps to Apply”
3. Select “High school graduates without some previous college credit”
- or - “High school graduates with some previous college credit”
4. Select “Create a WebRunner Account”
5. Select “Show Application Form”
6. Create your **Login ID**, your **PIN**, and verify your **PIN**
7. Select “Login”
8. Select the **Phlebotomy** Program from the Application Type drop down options (See **NOTE** below)
9. Select “Continue”
10. Select “Fall 2022” from the Admission Term drop down options
11. Enter at least your **first** and **last name** into the appropriate boxes
12. Select “Fill Out Application”
13. Complete all online application checklist items:
 - ✓ Name
 - ✓ Permanent Address
 - ✓ Personal Information¹
 - ✓ Mailing Address, if different from permanent
14. Select “Application is Complete”²

RETURNING/EXISTING LBCC STUDENTS: Log in to your WebRunner account, select the “**Student**” tab, select “**Admissions**”, select “**Apply with an online application**”, select “**New**” to create a new application, and then, *beginning at step 8*, follow the rest of the above online application steps. (See **NOTE** below)

NOTE: Selecting any other application type will prevent you from being able to proceed through this program’s application processes, thus may forfeit your admission consideration. If you are applying within the appropriate application dates but are unable to view this program on the Application Type drop down list, create a new application by starting at Step 1 (using a new Login ID and password). Be sure to select the appropriate program type from the drop down list. Do NOT select *A New Student* nor *Transfer Student*.

Remember: After completing the Online Application for Admission you will receive an email with a link to the Online Supplemental Information Form with a response deadline included. See pages 3 and 5 for additional information.

Tips: ¹ Date of Birth (DOB) and Social Security Numbers (SSN) are used, in part, to help ensure applications are not mismatched between LBCC applicants with the same names. During this step of the application process entry of DOB will be required and entry of SSN will be optional. Both may be required for other admission requirements.

² Once you submit your application a time/date stamp will be applied electronically. If additional information is needed to process your online application, you will be contacted by a staff member from the Admissions department. Failure to provide accurate information will result in your application being delayed and may result in it being denied.

2022 STATEMENT OF UNDERSTANDING AND COMPLIANCE

When applying to this program you will be required to affirm that you understand all of the following:

- Students admitted to this program must be the age of 18 or older prior to the scheduled start date.
- LBCC's Students Right to Know information located at www.linnbenton.edu/student-rights.
- Admission Limitations, Financial Aid's Satisfactory Academic Progress, and Student Civil Rights (see page 3).
- Applicants must comply with all application criteria and deadlines as outlined in this bulletin.
- Communication from LBCC regarding your program application will be sent to your LBCC email account. If you do not yet have an LBCC email, we will send information via your personal email until an LBCC email has been assigned.
- Some occupational health hazards include the use of latex gloves and masks. Meet with the Phlebotomy advisor if you have any skin, breathing or other risk factors to consider.
- If you have a communicable disease which may be transmitted under normal Phlebotomy activities, you will be required to have documentation of completing medical treatment prior to participating in clinical/lab assignments.
- If admitted, you will be required to complete all admissions processes and graduation requirements.
- If admitted, you will be required to pay for and complete the LBCC approved criminal background check. The results will determine, in part, eligibility to remain in the program but will not guarantee eligibility to be licensed or employed in this career field. Neither previously completed nor alternative background checks will suffice.
- If admitted, you will have their social security number (SSN) matched against the US Department of Health & Human Services list of individuals who are barred from any participation in federally funded health programs. If on the list, you will not be eligible to participate in this program.
- If admitted, you will be required to cooperate with the drug testing policies of the program as well as any clinical experience or cooperative teaching site as a condition for continued enrollment in the course and/or related academic program. You may also be required to comply with a non-LBCC site's policy. Testing may be random and unannounced or conducted when there is reasonable suspicion that performance and/or behavior may be the result of the presence of a drug. The presence, as determined by the program approved test procedures, of prescription or non-prescription drugs, controlled substances or cannabis may result in immediate dismissal from the work site and disenrollment from the course and related academic program. You may also be subject to appropriate disciplinary action for violating the Standards of Conduct as noted in LBCC's Students Rights and Responsibilities.
- If admitted, you will be required to pay for, submit proof of, and keep current all post-admission requirements, including immunizations, medical screens, and AHA BLS CPR certification as per the criteria and deadlines which will be specified in the admission materials.
- If admitted, you will be required to submit proof of being fully vaccinated for COVID-19 as one of the post-admission requirements. Completion deadline to be determined. At this time, exemptions are not being considered by our clinical partner healthcare sites for students who will have direct patient contact.
- If admitted, you will be required to maintain a minimum "C" grade in each degree required course, and courses must be taken in the specified sequence.

PROGRAM FEES, PAYMENT PLAN & DEPOSIT

Entry into the Phlebotomy Program is very competitive. **Admitted students who choose to withdraw after the program starts or who fail from the program will immediately be responsible for the remaining Program Fees balance for the program.** The estimated cost of the program is **\$5,550.00** (subject to increase). This includes required books, registration, lab fees and instructional costs. A payment plan is available to those who qualify. Students who will be utilizing a payment plan will be required to submit a Deferred Note Contract (DNC) and pay a deposit of **\$400** (deposit subject to increase) by the Mandatory Orientation deadline. The deposit is due before any financial aid is received. Additional documentation may be required from students receiving Financial Aid and/or other third party program fee assistance awards. **The second payment of \$2,575.00 will be due no later than October 3, 2022.**

POST-ADMISSION REQUIREMENTS

Only applicants who receive an admission offer will be required to complete Post-Admission Requirements.

Additional instructions will be provided with the admission offer emails. The costs of the following are not included in the cost of program tuition and fees. The following are subject to change:

- **SUMMER TERM COMPLETION:** If applicable, submit proof of Summer term minimum application course completion with a “C” grade or better. If completed at another institution, submit official transcripts
- **INFORMATION RELEASE:** Instructions will be provided to admitted students with the admission materials
- **CRIMINAL BACKGROUND CHECK:** Pass the LBCC approved background check (estimated cost: \$66)
- **HEALTH AND TRAINING DOCUMENTATION:** Electronically submit the appropriate immunization, medical screening, and CPR documentation. (estimated review and tracking cost is \$30; cost of immunizations, medical screenings, and CPR certification varies; NOT included in program cost)
 - **Positive Hepatitis B surface antibody titer*** – blood test; vaccinations alone will not be accepted
NOTE: Early action on this item is required. Completion of the required vaccines AND required antibody test can take 6-8 months. It is recommended to have official proof of your entire vaccination series prior to applying to this program. Proof of the entire vaccination series AND the follow-up HepB Surface Antibody Titer will be required by August 2022. In the event of a NON-positive Antibody Titer, proof of the original vaccine series, proof of the NON-positive antibody test, AND at least 2 additional vaccines must be submitted by September 2022. Additional documentation may also be required.
 - **MMR (Measles, Mumps, Rubella)*** – positive antibody titers for all three components or 2 vaccines
 - **Varicella (Chicken Pox)*** – positive antibody titer or 2 vaccines
 - **Tdap (Tetanus, Diphtheria and Pertussis)*** – 1 dose within the last 10 years and updated every 10 years
 - **COVID-19*** – proof of being fully vaccinated; documentation must include the vaccine manufacturer(s)
 - **Negative Tuberculosis (TB) test*** – Either a Negative TB Blood Test (Quantiferon Gold or T-Spot) or Negative 2-Step TB Test (involves 2 separate Negative TB skin tests completed 1-3 weeks apart); must have been completed within the last 12 months and updated annually while in the program
 - **CPR – ONLY AMERICAN HEART ASSOCIATION’S (AHA) BLS PROVIDER CPR CERTIFICATION** will be accepted. Alternative CPR certifications, even through AHA, will be denied. CPR must be kept current.

** Must include either a copy of an official immunization card or original immunization/medical screening document. Official documentation must include: 1) Your name, 2) Date of Birth, 3) Name of administering Agency or provider, 4) Name of injection, test, etc., and results, if applicable, 5) Date of injection, test, etc., 6) Healthcare Provider’s signature, official stamp or letterhead.*
- **RECOMMENDED IMMUNIZATIONS:** Submission of the following are recommended but not required. Some clinical sites in Oregon may require one or all of these for clinical placement acceptance, thus not completing these might result in fewer clinical placement options while in the program.
 - **Flu shot** – Current flu vaccine & repeated annually
 - **Polio** – positive antibody titers or 3 vaccinations
 - **COVID-19 Booster** – Completed per CDC guidelines
- **DRUG TEST:** Passing the LBCC approved drug test will be required (estimated cost is \$55).
- **MANDATORY ORIENTATION:** September 16, 2022, 2:00 - 4:00 PM
- **LBCC ADMISSION FEE:** Students who have never paid the admission fee will be required to prior to program start
- **ADDITIONAL COSTS:** Admitted students will receive additional details. Student costs may include the completion of a N-95 mask Fit screen/test through an Occupational Medicine facility (est. cost: \$70 - \$275) and the purchase of field specific student liability insurance (costs vary).

Sleep Technology

APPLICATION UPDATE: The Fall 2022 application has closed. We do not yet know when the next application will open. The Sleep Technology Program only runs when qualified applicant enrollment numbers allow. To be added to the Sleep Technology Program Interest List please contact Lorraine Lara, Healthcare Academic Planning Specialist, at HealthcarePrograms@linnbenton.edu or 541-917-4923. Individuals on the interest list will receive Sleep Technology Program updates via email.

PROGRAM OVERVIEW: Sleep Technology (aka: Polysomnography), is an allied healthcare occupation. Sleep Technologists work as a team under the supervision of a licensed physician to assist in the education, evaluation, treatment, and follow-up of sleep disorders in patients of all ages. These professionals analyze, monitor, and record physiologic data during sleep and wakefulness. These services are performed in a safe, aseptic, and restorative manner, using equipment and procedure in the evaluation of sleep during a sleep study. This nine month certificate builds skills necessary to work as a Sleep Technologist. The program prepares students for certification by the Board of Registered Polysomnographic Technologists, and the curriculum complies with American Association of Sleep Technologist standards. This 43-credit program will be offered through a combination of online course work, lecture, hands-on practice and patient contact in a clinical practicum.

PROGRAM FORMAT: A group of up to 24 students will move through this three-term program as a cohort. The majority of coursework will be offered online with lab classes meeting on selected days at LBCC's Healthcare Occupations Center. Students should allow approximately 40 hours a week for coursework. This program is accredited through the Commission on Accreditation of Allied Health Education Programs (CAAHEP). Accreditation through this commission allows the student to sit for the Board of Registered Polysomnographic Technician national exam immediately upon successful completion of the course. For additional information visit: www.linnbenton.edu/polysomnographic-technology

ESTIMATED PROGRAM COST: \$9,775 (subject to change). Includes books and supplies.

CLASS SELECTION PROCESS: Applications are accepted on a first-come, first-served basis with preference given to residents of Oregon within the dates listed below. It is your responsibility to be informed on and adhere to all requirements, procedures and deadlines as they may change from year to year. New applicants to LBCC as well as previously admitted LBCC students must complete the following application process. **Cancellation:** Sessions are subject to cancellation if a minimum number of eligible students are not admitted. Students must reapply for later sessions.

NONDISCRIMINATION STATEMENT

LBCC Comprehensive Statement of Nondiscrimination

Linn-Benton Community College does not discriminate based on race, color, religion, ethnicity, use of native language, national origin, sex, sexual orientation, gender, gender identity, marital status, disability, veteran status, age, or any other status protected under applicable federal, state, or local laws in its programs or activities. For further information see Board Policy 1015 and Administrative Rule 1015-01. The following staff members have been designated to handle inquiries regarding the nondiscrimination policies:

For concerns or inquiries regarding disability accessibility and accommodations:

Contact: Carol Raymundo, Director of Center for Accessibility Resources

RCH-101, Albany Campus, Albany, OR 97321

(541) 917-4789

raymundo@linnbenton.edu

For concerns or complaints about the College or an LBCC staff member:

Contact: Scott Rolen, Director of Human Resource Development and Support and Title IX Coordinator

CC-108, Albany Campus, Albany, OR 97321

(541) 917-4425

rolens@linnbenton.edu

For concerns or complaints about a student:

Contact: Jill Childress, Manager for Student Conduct and Retention and Title IX Coordinator

WH-215, Albany Campus, Albany, OR 97321

(541) 917-4806

childrj@linnbenton.edu

Request for Special Needs or Accommodations

Direct questions about or requests for accommodations to the Center for Accessibility Resources, 541-917-4789 or cfar@linnbenton.edu at least three business days in advance for special events and as soon as possible for classroom or other emerging requests. LBCC will make every effort to honor requests. LBCC is an equal opportunity educator and employer.

ADMISSION LIMITATIONS

Applicants should be aware of the following Admission Limitations; failure to comply may result in application denial:

- **PREVIOUSLY ADMITTED STUDENTS:** Applicants who have previously been admitted to this program are no longer eligible to apply if they exited the program based on safety concerns or if they exited the program two previous times based on unsuccessful attempts to pass academic and/or clinical requirements not directly related to safety (includes withdrawal in lieu of failing grades).
- **APPLICATION COMPLETION:** Applicants must submit proof of completing all Minimum Application Requirements by the deadlines given to be considered for admission to this program. Applicants are responsible for ensuring LBCC's Admission department has up-to-date transcripts and course information for transfer credits they want considered.
- **HOLDS*:** Applicants must have no registration Holds at LBCC during the entire application and admissions process to be considered for admission to this program.
- **ACADEMIC STANDING*:** Applicants' [Academic Standing](#) must be in Good Standing at LBCC during the entire application and admissions process to be considered for admission to this program.
- **STUDENT STATUS*:** Applicants must be in good Student Status with Student Services at LBCC during the entire application and admissions process to be considered for admission to this program.

* To view your status at LBCC: 1) Log in to WebRunner, 2) Select "Student," 3) Select "Registration," 4) Select "Check Your Registration Status," then 5) Select the next available term. Contact your LBCC advisor if you have questions about your status.

NOTE REGARDING FINANCIAL AID: The Federal Financial Aid standards and policies regarding Satisfactory Academic Progress (SAP) are not identical to the college's standards on admission/registration eligibility. Poor Financial Aid SAP status will not limit your potential admission into this program, but may severely affect your funding options. To view your current SAP status: 1) Log in to WebRunner, 2) Select "Financial Aid," 3) Select "Your Financial Aid Status," 4) Select the Aid Year. To find out more about applying for Financial Aid through LBCC go to: <https://www.linnbenton.edu/tuition-and-admission/financial-aid/>

RESIDENCY INFORMATION FOR SPECIAL ADMISSION PROGRAMS

For admission to special programs, a resident is defined as someone who established permanent residency 90 days before the first day applications are accepted for that program. Permanent residency is defined as the home a person intends to return to after any absence, and in which one's dependents reside for an unlimited period of time. As part of the Online Supplemental Information Form you will be required to submit information regarding your residency for the entire 90 day period leading up to the application. Information you will be required to provide includes legal name, phone number, LBCC student ID or Social Security Number, program of choice, street address, city, state, ZIP, and time period at the applicable address(es). You may be required to submit additional documentation upon request to show proof of your permanent residence. Misrepresentation of your permanent residence may result in forfeiture of your application status with this program. **NOTE:** Not all student Visas allow students to claim USA permanent residential status and/or be admitted to this program. International students need to consult International Admissions to see if they are eligible to apply. Go to <http://www.linnbenton.edu/international-students> for more information.

2022 SLEEP TECHNOLOGY MINIMUM APPLICATION REQUIREMENTS ~ APPLICATION CLOSED ~

If you satisfy the minimum application requirements and do not have any other admission limitations, you will be considered a qualified applicant. Course numbers noted below refer to LBCC courses as described in the LBCC Catalog. Spring/Summer term enrollment (pending completion by September 1, 2022) and/or placing **above** the courses via the LBCC Placement Tests (www.linnbenton.edu/student-assessment) will be accepted. Courses must be completed with a grade of “C” or higher at a regionally accredited institution. Placement/Waiver Tests must be completed prior to program application. Official transcripts from original institutions are required for proof of transfer course completion. Transfer course equivalency is considered on a case by case basis and is not guaranteed.

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| | MANDATORY PRE-APPLICATION INFO SESSION: linnbenton.edu/polysomnographic-technology (select the Information Session link on the left side of the page). All applicants must complete the 2022-23 online information session prior to applying to this program. |
| | CHECK FOR APPLICATION LIMITATIONS (see page 2) |
| | SUBMIT OFFICIAL TRANSCRIPTS from all non-LBCC institutions (www.linnbenton.edu/transcripts) NOTE: Unofficial transcripts will NOT be accepted to show proof of course completion. |
| | ONLINE APPLICATION (see page 4) ~ APPLICATION CLOSED ~ |
| | ONLINE SUPPLEMENTAL INFORMATION FORM After completing the online application, a link to the Online Supplemental Information Form will be sent to applicants via email within 1-3 business days. Information regarding the following will be required to be provided within that form. NOTE: Applicants will be required to supply the following for the required course: course number, college or university where each course was completed, month and year course was completed, and the grade received. |
| | ➤ Residency (see page 5) |
| | ➤ Understanding and Compliance (see page 5) |
| | ➤ Minimum Application Requirement Courses You will be required to provide the course number, college or university where each course was completed, month and year each course was completed, and the grade received. |
| | CS 120 - Digital Literacy* |
| | MTH 098 - Foundations for Contemporary Math** or higher (completed since September 2017) |
| | WR 095 - College Writing Fundamentals** or higher |

* Successfully passing LBCC’s CS 120 Waiver Exam PRIOR TO APPLYING TO THIS PROGRAM may be used to meet the Digital Literacy requirement (www.linnbenton.edu/student-assessment).

** Successfully placing **above** this course via the LBCC Placement Tests PRIOR TO APPLYING TO THIS PROGRAM may be used to meet the Minimum Application Requirement (www.linnbenton.edu/student-assessment). Time restrictions still apply. “Self” Placement will not be considered in this application.

Application Questions:

Lorraine Lara

Academic Planning Specialist

HealthcarePrograms@linnbenton.edu

Cancellation: Sessions are subject to cancellation if a minimum number of eligible students are not admitted. Students must reapply for later sessions.

2022 STATEMENT OF UNDERSTANDING AND COMPLIANCE

When applying to this program you will be required to affirm that you understand all of the following:

- Students admitted to this program must be the age of 18 or older prior to the scheduled start date.
- LBCC's Students Right to Know information located at www.linnbenton.edu/student-rights.
- Admission Limitations, Financial Aid's Satisfactory Academic Progress, and Student Civil Rights (see page 3).
- Applicants must comply with all application criteria and deadlines as outlined in this bulletin.
- Communication from LBCC regarding your program application will be sent to your LBCC email account. If you do not yet have an LBCC email, LBCC will send information via your personal email until an LBCC email has been assigned.
- Some occupational health hazards include the use of latex gloves and masks. Meet with the Sleep Technology advisor if you have any skin, breathing or other risk factors to consider.
- If you have a communicable disease which may be transmitted under normal activities, you will be required to have documentation of completing medical treatment prior to participating in clinical/lab assignments.
- If admitted, you will be required to complete all LBCC admissions processes and graduation requirements.
- If admitted, you will be required to pay for and complete the LBCC approved criminal background check. The results will determine, in part, eligibility to remain in the program but will not guarantee your eligibility to be licensed or employed in this career field. Neither previously completed nor alternative criminal background checks will suffice.
- If admitted, you will have your social security number (SSN) matched against the US Department of Health & Human Services list of individuals who are barred from any participation in federally funded health programs. If on the list, you will not be eligible to participate in this program.
- If admitted, you will be required to cooperate with the drug test policies of any work experience, clinical or cooperative teaching site as a condition for continued enrollment in this program and/or related academic courses. Students may be required to comply with the non-LBCC site's policy. Testing may be random and unannounced or conducted when there is reasonable suspicion that performance and/or behavior may be the result of the presence of a drug. The presence, as determined by the program's test procedures, of prescription or non-prescription drugs, controlled substances or cannabis may result in immediate dismissal from the work site and disenrollment from the course and/or related academic program if the course is a requirement for program completion. Students may also be subject to appropriate disciplinary action for violating LBCC's Student Standards of Conduct.
- If admitted, you will be required to pay for, submit proof of, and keep current all post-admission requirements, including immunizations, medical screens, and CPR certification as per the criteria and deadlines which will be specified in the admission materials.
- If admitted, you will be required to submit proof of being fully vaccinated for COVID-19 as one of the post-admission requirements. At this time, exemptions are not being considered by our clinical partner healthcare sites for students who will have direct patient contact.
- If admitted, you will be required to maintain a minimum "C" grade in each graduation required course, and courses must be taken in the specified sequence.

PROGRAM FEES, PAYMENT PLAN & DEPOSIT

Entry into the Sleep Technology (aka: Polysomnography) Program is very competitive. **Admitted students who choose to withdraw after the program starts or who fail from the program will immediately be responsible for the remaining Program Fees balance for the program.** The estimated cost of the program is **\$9,775** (subject to increase). This includes required books, registration, lab fees and instructional costs. Payment options and plans are available to those who qualify. Students who will be utilizing a payment plan will be required to submit a Deferred Note Contract (DNC) and pay a deposit of **\$400** (deposit subject to increase) by the Mandatory Orientation deadline. The deposit is due before any financial aid is received. Additional documentation may be required from students receiving Financial Aid and/or other third party tuition assistance awards. **The second payment of \$3,125.00 will be due October 3, 2022.**

POST-ADMISSION REQUIREMENTS

Only applicants who receive an admission offer will be required to complete Post-Admission Requirements.

Additional instructions will be provided with the admission offer emails. The costs of the following are not included in the cost of program tuition and fees. The following are subject to change:

- **SPRING/SUMMER TERM COMPLETION:** If applicable, submit proof of minimum application course completion with a “C” grade or better. If completed at another institution, submit official transcript
- **INFORMATION RELEASE:** complete and submit an Information Release form
- **CRIMINAL BACKGROUND CHECK:** Pass the LBCC approved background check (est. cost: \$66)
- **HEALTH AND TRAINING DOCUMENTATION:** Electronically submit the appropriate immunization, medical screening, and CPR documentation. (estimated review and tracking cost is \$30; cost of immunizations, medical screenings, and CPR certification varies; NOT included in program cost)
 - **Positive Hepatitis B surface antibody titer*** – antibody blood test; vaccinations alone will not suffice
 - **NOTE:** Early action on this item is required. Completion of the required vaccines AND required antibody test can take 6-8 months. It is recommended to have official proof of your entire vaccination series prior to applying to this program. Proof of the entire vaccination series AND the follow-up HepB Surface Antibody Titer will be required by August 2022. In the event of a NON-positive Antibody Titer, proof of the original vaccine series, proof of the NON-positive antibody test, AND at least 2 additional vaccines must be submitted by September 2022. Additional documentation may also be required.
 - **MMR (Measles, Mumps, Rubella)*** – positive antibody titers for all three components or 2 vaccines
 - **Varicella (Chicken Pox)*** – positive antibody titer or 2 vaccines
 - **Tdap (Tetanus, Diphtheria and Pertussis)*** – 1 dose within the last 10 years and updated every 10 years
 - **COVID-19*** – proof of being fully vaccinated; documentation must include the vaccine manufacturer(s)
 - **Negative Tuberculosis (TB) test*** – Either a Negative TB Blood Test (Quantiferon Gold or T-Spot) or Negative 2-Step TB Test (involves 2 separate Negative TB skin tests completed 1-3 weeks apart); must have been completed within the last 12 months and updated annually while in the program
 - **CPR** – ONLY AMERICAN HEART ASSOCIATION’S (AHA) BLS PROVIDER CPR CERTIFICATION will be accepted. Alternative CPR certifications, even through AHA, will be denied. CPR must be kept current.

** Must include either a copy of an official immunization card or original immunization/medical screening document. Official documentation must include: 1) Your name, 2) Date of Birth, 3) Name of administering Agency or provider, 4) Name of injection, test, etc., and results, if applicable, 5) Date of injection, test, etc., 6) Healthcare Provider’s signature, official stamp or letterhead.*
- **RECOMMENDED IMMUNIZATIONS:** Submission of the following are recommended but not required. Some clinical sites in Oregon may require one or all of these for clinical placement acceptance, thus not completing these might result in fewer clinical placement options while in the program.
 - _ **Flu shot** – Current flu vaccine & repeated annually
 - _ **Polio** – positive antibody titers or 3 vaccinations
 - _ **COVID-19** – Completed per CDC guidelines
- **DRUG TEST:** Pass the LBCC approved drug test (est. cost is \$55).
- **MANDATORY ORIENTATION:** Orientation is currently scheduled to take place during the first lab day.
- **LBCC ADMISSION FEE:** Students who have never paid the admission fee will be required to prior to program start
- **ADDITIONAL COSTS:** Admitted students will receive additional details. Student costs may include the completion of a N-95 mask Fit screen/test through an Occupational Medicine facility (est. cost: \$70 - \$275) and the purchase of field specific student liability insurance (costs vary).

Surgical Technology - FALL 2022

PROGRAM OVERVIEW: Surgical Technology is an allied healthcare occupation. Surgical Technologists work in hospitals and assist surgeons during surgery by passing them sterile supplies and instruments. They prepare operating rooms for surgery, including making sure supplies are sterile and ready for use, and maintaining a sterile environment in the operating room. This nine month certificate builds skills necessary to work as a Surgical Technologist, and prepares students to sit for the national certification through the National Board of Surgical Technology and Surgical Assisting (NBSTSA).

PROGRAM FORMAT: A group of up to 18 students will move through this three-term program as a cohort. The coursework will be offered online for the first two terms with a practicum component during the final term at a healthcare facility in Oregon. Students are required to travel to campus for in-person scheduled labs one day per week (days TBD) throughout the first two terms of the program. Students should allow approximately 40 hours a week for coursework. Classes are taught using the online learning management system, Moodle. During the final term of the program, students will complete a minimum of 360 hours of practicum work **and** a minimum of 120 cases at a clinical practicum site. This work is required for students looking to become certified Surgical Technologists. For additional information visit:

<http://www.linnbenton.edu/surgical-technician>

ESTIMATED PROGRAM FEES: \$9,750 (subject to change; see page 6 for additional information)

PROGRAM DATES: Fall Term 2022 - Spring Term 2023

MANDATORY PRE-APPLICATION INFORMATION SESSION: <http://www.linnbenton.edu/surgical-technician>

APPLICATION DATES: Online application opens: **July 11, 2022, 9:00 A.M.**

Application Close Date: **July 19, 2022, Midnight**

APPLICATION DECISION: Application decision emails will begin to go out **during week of July 25, 2022**

POST-ADMISSION REQUIREMENTS DEADLINE: September 12, 2022 (see last page)

ONLINE MANDATORY ORIENTATION: To be completed online during the first day of classes

CLASS SELECTION PROCESS: Applications are considered on a first-come, first-served basis with preference given to residents of Oregon (see Resident Priority below). Applicants may only choose one cohort toward which to be considered for admission (see page 6). All applicants, regardless of cohort selection, must submit applications through LBCC using the application criteria outlined in this application bulletin. All admitted students will follow the same class, lab, and clinical format once in the program (see Program Format above). It is your responsibility to be informed on and adhere to all requirements, procedures and deadlines as they may change from year to year. New applicants to LBCC as well as previously admitted LBCC students must complete the following application process.

RESIDENT PRIORITY will be given to residents of Oregon followed by out-of-state and then international applicants between July 11 - 15, 2022; after these dates Resident Priority will no longer be considered. **NOTE:** Not all student Visas allow students to claim USA permanent residential status and/or be admitted to this type of program. International students need to consult LBCC's International Admissions to determine whether they are eligible to apply. For more information go to <http://www.linnbenton.edu/international-students>.

CANCELLATION: Sessions are subject to cancellation if a minimum number of eligible students are not admitted. Students must reapply for later sessions.

NONDISCRIMINATION STATEMENT

LBCC Comprehensive Statement of Nondiscrimination

Linn-Benton Community College does not discriminate based on race, color, religion, ethnicity, use of native language, national origin, sex, sexual orientation, gender, gender identity, marital status, disability, veteran status, age, or any other status protected under applicable federal, state, or local laws in its programs or activities. For further information see Board Policy 1015 and Administrative Rule 1015-01. The following staff members have been designated to handle inquiries regarding the nondiscrimination policies:

For concerns or inquiries regarding disability accessibility and accommodations:

Contact: Carol Raymundo, Director of Center for Accessibility Resources

RCH-101, Albany Campus, Albany, OR 97321

(541) 917-4789

raymundo@linnbenton.edu

For concerns or complaints about the College or an LBCC staff member:

Contact: Scott Rolén, Director of Human Resource Development and Support and Title IX Coordinator

CC-108, Albany Campus, Albany, OR 97321

(541) 917-4425

rolens@linnbenton.edu

For concerns or complaints about a student:

Contact: Jill Childress, Manager for Student Conduct and Retention and Title IX Coordinator

WH-215, Albany Campus, Albany, OR 97321

(541) 917-4806

childrj@linnbenton.edu

Request for Special Needs or Accommodations

Direct questions about or requests for accommodations to the Center for Accessibility Resources, 541-917-4789 or cfar@linnbenton.edu at least three business days in advance for special events and as soon as possible for classroom or other emerging requests. LBCC will make every effort to honor requests. LBCC is an equal opportunity educator and employer.

ADMISSION LIMITATIONS

Applicants should be aware of the following Admission Limitations; failure to comply may result in application denial:

- **APPLICATION COMPLETION:** Applicants must submit proof of completing all Minimum Application Requirements by the deadlines given to be considered for admission to this program. Applicants are responsible for ensuring LBCC's Admission department has up-to-date transcripts and course information for transfer credits they want considered.
- **HOLDS*:** Applicants must have no registration Holds at LBCC during the entire application and admissions process to be considered for admission to this program.
- **ACADEMIC STANDING*:** Applicants' Academic Standing must be in Good Standing at LBCC during the entire application and admissions process to be considered for admission to this program.
- **STUDENT STATUS*:** Applicants must be in good Student Status with Student Services at LBCC during the entire application and admissions process to be considered for admission to this program.

* To view your Overall Academic Standing and Student Statuses at LBCC: 1) Log in to WebRunner through [Single Sign-On](#), 2) Select "Student," 3) Select "Student Profile," then 4) Select "Registration Notices" in the upper right corner of the page. Contact your LBCC advisor if you have questions about your status.

NOTE REGARDING FINANCIAL AID: The Federal Financial Aid standards and policies regarding Satisfactory Academic Progress (SAP) are not identical to the college's standards on admission/registration eligibility. Poor Financial Aid SAP status will not limit your potential admission into this program, but may severely affect your funding options. To view your current SAP status: 1) Log in to WebRunner, 2) Select "Financial Aid," 3) Select "Your Financial Aid Status," 4) Select the Aid Year. To find out more about Financial Aid Academic Standards at LBCC go to: <https://www.linnbenton.edu/tuition-and-admission/financial-aid/>

RESIDENCY INFORMATION FOR LIMITED ENROLLMENT PROGRAMS

For admission to limited enrollment programs, a resident is defined as someone who established permanent residency 90 days before the first day applications are accepted for that program. Permanent residency is defined as the home a person intends to return to after any absence, and in which one's dependents reside for an unlimited period of time. As part of the application process you will be required to submit information regarding your residency for the entire 90 day period leading up to the application. Information you will be required to provide includes legal name, phone number, LBCC student ID or Social Security Number, program of choice, street address, city, state, ZIP, and time period at the applicable address(es). You may be required to submit additional documentation upon request to show proof of your permanent residence.

Misrepresentation of your permanent residence may result in forfeiture of your application status with this program. **NOTE:** Not all student Visas allow students to claim USA permanent residential status and/or be admitted to this program. International students need to consult International Admissions to see if they are eligible to apply. Go to <http://www.linnbenton.edu/international-students> for more information.

2022 FALL SURGICAL TECHNOLOGY MINIMUM APPLICATION REQUIREMENTS

If you satisfy the minimum application requirements and do not have any other admission limitations, you will be considered a qualified applicant. Course numbers noted below refer to LBCC courses as described in the LBCC Catalog. Summer term course enrollment (pending completion by September 9, 2022) and/or placing **above** the courses on the LBCC Placement Tests (www.linnbenton.edu/student-assessment) will be accepted. Courses must be completed with a grade of "C" or higher through a regionally accredited institution. Placement Tests must be taken prior to program application. College course completion through NON-LBCC institutions must be proven through official transcripts from the original institution(s) where each applicable course was completed. Transfer course equivalency is considered on a case by case basis and is not guaranteed.

| MINIMUM APPLICATION REQUIREMENTS: | |
|-----------------------------------|--|
| | MANDATORY PRE-APPLICATION INFORMATION SESSION: www.linnbenton.edu/surgical-technician (select the Information Session link on the left side of the page). All applicants must complete the 2021-22 online information session prior to applying to this program. |
| | CHECK FOR APPLICATION LIMITATIONS (<i>see page 3</i>) |
| | SUBMIT OFFICIAL TRANSCRIPTS from all non-LBCC institutions (www.linnbenton.edu/transcripts) NOTE: <u>Unofficial</u> transcripts will NOT be accepted to show proof of course completion. |
| | ONLINE APPLICATION (<i>see page 5</i>) |
| | ONLINE SUPPLEMENTAL INFORMATION FORM After completing the online application, a link to the Online Supplemental Information Form will be sent to applicants via email within 1-3 business days. Information regarding the following will be required to be provided within that form. |
| | ➤ Residency (<i>see page 3</i>) |
| | ➤ Understanding and Compliance (<i>see page 6</i>) |
| | ➤ Minimum Application Requirement Courses You will be required to provide the course number, college or university where each course was completed, month and year each course was completed, and the grade received. |
| | MTH 098 - Foundations of Contemporary Math (completed since September 2017)* |
| | WR 095 - College Writing Fundamentals (completed since September 2017)* |

NOTE: Proof of at least one year of work experience from within the last five years as a Sterile Processor or Operating Room Experience (example: an OR aide) in either an ambulatory surgery center or hospital setting may be used to meet the Math minimum application requirement. Submission of a resume (must include dates of work, work settings, and employer contact information) or submission of the Work Experience Verification Form located on page 6 is required to utilize this option. Work experience will not be considered toward the Writing minimum application requirement. **Beginning with the Fall 2023 application, we will no longer be able to accept work experience to meet any of the minimum application requirements.**

* Successfully placing **above** this course PRIOR TO APPLYING TO THIS PROGRAM through the LBCC Student Assessment Department (www.linnbenton.edu/student-assessment) may be used to meet the Minimum Application Requirement. Time limits still apply. "Self" Placement will not be considered in this application.

Application Questions:

Lorraine Lara

Academic Planning Specialist

HealthcarePrograms@linnbenton.edu

ONLINE APPLICATION INFORMATION

When applying for the Surgical Technology Program, you are required to apply online. Applications will open online on July 11, 2022 at 9:00 A.M. Online applications receive an automatic time/date stamp. Early applications will not be considered. Resident Priority ends July 15, 2022 at midnight (see page 1). **Application CLOSE Date: July 19, 2022, Midnight.**

Online Application Instructions:

1. Go to <http://www.linnbenton.edu/apply>
2. Select **“See Steps to Apply”**
3. Select **“High school graduates without some previous college credit”**
- or - **“High school graduates with some previous college credit”**
4. Select **“Create a WebRunner Account”**
5. Select **“Show Application Form”**
6. Create your **Login ID**, your **PIN**, and verify your **PIN**
7. Select **“Login”**
8. Select the **Surgical Technology** from the Application Type drop down options (See **NOTE** below)
9. Select **“Continue”**
10. Select **“Fall 2022”** from the Admission Term drop down options
11. Enter at least your **first** and **last name** into the appropriate boxes
12. Select **“Fill Out Application”**
13. Complete all online application checklist items:
 - ✓ Name
 - ✓ Permanent Address
 - ✓ Personal Information¹
 - ✓ Mailing Address, if different from permanent
14. Select **“Application is Complete”**²

RETURNING/EXISTING LBCC STUDENTS: Log in to your WebRunner account, select the **“Student”** tab, select **“Admissions”**, select **“Apply with an online application”**, select **“New”** to create a new application, and then, *beginning at step 8*, follow the rest of the above online application steps. (See **NOTE** below)

NOTE: Selecting any other application type will prevent you from being able to proceed through this program’s application processes, thus may forfeit your admission consideration. If you are applying within the appropriate application dates but are unable to view this program on the Application Type drop down list, create a new application by starting at Step 1 (using a new Login ID and password). Be sure to select the appropriate program type from the drop down list. Do NOT select *A New Student* nor *Transfer Student*.

Remember: After completing the Online Application for Admission you will receive an email with a link to the Online Supplemental Information Form with a response deadline included. See pages 3 and 5 for additional information.

Tips: ¹ Date of Birth (DOB) and Social Security Numbers (SSN) are used, in part, to help ensure applications are not mismatched between LBCC applicants with the same names. During this step of the application process entry of DOB will be required and entry of SSN will be optional. Both may be required for other admission requirements.

² Once you submit your application a time/date stamp will be applied electronically. If additional information is needed to process your online application, you will be contacted by a staff member from the Admissions department. Failure to provide accurate information will result in your application being delayed and may result in it being denied.

2022 STATEMENT OF UNDERSTANDING AND COMPLIANCE

When applying to this program you will be required to affirm that you understand all of the following:

- Students admitted to this program must be the age of 18 or older prior to the scheduled start date.
- LBCC's Students Right to Know information at www.linnbenton.edu/student-rights.
- Admission Limitations, Financial Aid Satisfactory Academic Progress, and Student Civil Rights (see page 3).
- Applicants must comply with all application criteria and deadlines in this bulletin.
- Communication from LBCC regarding your program application will be sent to your LBCC email account. If you do not yet have an LBCC email, LBCC will send information via your personal email until an LBCC email has been assigned.
- Some occupational health hazards include the use of latex gloves and masks. Meet with the Surgical Technology advisor if you have any skin, breathing or other risk factors to consider.
- If you have a communicable disease which may be transmitted under normal activities, you will be required to have documentation of completing medical treatment prior to participating in clinical/lab assignments.
- If admitted, you will be required to complete all LBCC admissions processes and graduation requirements.
- If admitted, you will be required to pay for and complete the LBCC approved criminal background check. The results will determine, in part, eligibility to remain in the program but will not guarantee eligibility to be licensed or employed in this career field. Neither previously completed nor alternative criminal background checks will suffice.
- If admitted, you will have your social security number (SSN) matched against the US Department of Health & Human Services list of individuals who are barred from any participation in federally funded health programs. If on the list, you will not be eligible to participate in this program.
- If admitted, you will be required to cooperate with the drug test policies of any work experience, clinical or cooperative teaching site as a condition for continued enrollment in this program and/or related academic courses. Students may be required to comply with the non-LBCC site's policy. Testing may be random and unannounced or conducted when there is reasonable suspicion that performance and/or behavior may be the result of the presence of a drug. The presence, as determined by the program's test procedures, of prescription or non-prescription drugs, controlled substances or cannabis may result in immediate dismissal from the work site and disenrollment from the course and/or related academic program if the course is a requirement for program completion. Students may also be subject to appropriate disciplinary action for violating LBCC's Student Standards of Conduct.
- If admitted, you will be required to pay for, submit proof of, and keep current all post-admission requirements, including immunizations, medical screens, and CPR certification as per the criteria and deadlines which will be specified in the admission materials.
- If admitted, you will be required to submit proof of being fully vaccinated for COVID-19 as one of the post-admission requirements. Completion deadline to be determined. At this time, exemptions are not being considered by our clinical partner healthcare sites for students who will have direct patient contact.
- If admitted, you will be required to maintain a minimum "C" grade in each degree required course, and courses must be taken in the specified sequence.

PROGRAM FEES, PAYMENT PLAN & DEPOSIT

Entry into the Surgical Technology Program is very competitive. **Admitted students who choose to withdraw after the program starts or who fail from the program will immediately be responsible for the remaining Program Fees balance for the program.** The estimated cost of the program is **\$9,750.00** (subject to increase). This includes required books, registration, lab fees and instructional costs. A payment plan is available to those who qualify. Students who choose to utilize the payment plan will be required to submit a Deferred Note Contract (DNC) and pay a deposit of **\$400** (deposit subject to increase). The deposit is due before any financial aid is received. Additional documentation may be required from students receiving Financial Aid and/or other third party program fees assistance awards. **The second payment of \$3,116.67 will be due by October 3, 2022.**

2022 APPLICANT AREAS

All applicants must submit applications through LBCC using the application criteria outlined in this application bulletin. Applicants may only select ONE of the following area cohorts on their application. That is the application cohort toward which your application will be considered and compared.

- LINN-BENTON COMMUNITY COLLEGE AREA
- ROGUE COMMUNITY COLLEGE AREA

Lab experiences (Fall and Winter terms) and clinical placements (Fall term) are currently scheduled to be held in the areas associated with the cohort toward which you apply; specific days/times TBD. All costs associated with travel and/or relocation to the area is the responsibility of the student.

WORK EXPERIENCE VERIFICATION FORM

Proof of at least one year of work experience from within the last five years as a Sterile Processor or in an operating room (example: an OR aide) in either an ambulatory surgery center or hospital setting may be used to meet the Math minimum application requirement. Submission of this form or a resume (must include dates of work, work settings, and employer contact information) is required to show proof of work experience. If utilizing this form, the top portion must be completed by the applicant and the lower portion must be completed by the supervisor or human resources representative. Neither incomplete nor incorrectly completed forms will be considered.

NOTE: An electronic copy of work experience proof must be uploaded during your completion of the Online Supplemental Information Form (see page 3). Work Experience will NOT be considered toward the Writing requirement.

Dear Supervisor/Human Resources,
 I am in the process of applying to the Surgical Technologist Program offered through Linn-Benton Community College. I am choosing to submit proof of my work experience as a Sterile Processor in an ambulatory surgery center or hospital setting to be considered toward the Math minimum application requirement.

I, _____ (program applicant’s name), authorize the college to contact the individuals listed on this form to verify the information provided.

Program Applicant’s Signature: _____ **Date:** _____

- - - - - The portion below is to be completed by the Supervisor/Human Resources Representative - - - - -

A. Program Applicant’s Job Title: _____

B. Dates of Service (mm/dd/yy - mm/dd/yy): _____

C. Work Setting (select one): **AMBULATORY SURGERY CENTER** **HOSPITAL** _____

D. Description of Duties: _____

E. Name of Supervisor: _____ **Title:** _____

Supervisor’s Email: _____

F. Medical Facility: _____ **Phone:** _____

Facility Address: _____

g. Site Representative's Signature: _____ **Date:** _____

POST-ADMISSION REQUIREMENTS

Only applicants who receive an admission offer will be required to complete Post-Admission Requirements.

Additional instructions will be provided with the admission offer emails. The costs of the following are not included in the cost of program tuition and fees. The following are subject to change:

- **SUMMER TERM COMPLETION:** If applicable, submit proof of Summer term minimum application course completion with a “C” grade or better. If completed through another institution, submit official transcripts
 - **INFORMATION RELEASE:** Instructions will be provided to admitted students with the admission materials
 - **CRIMINAL BACKGROUND CHECK:** Pass the LBCC approved background check will be required (estimated cost: \$66)
 - **HEALTH AND TRAINING DOCUMENTATION:** Electronically submit the appropriate immunization, medical screening, and CPR documentation. (estimated review and tracking cost is \$30; cost of immunizations, medical screenings, and CPR certification varies; NOT included in program cost)
 - **Positive Hepatitis B surface antibody titer*** – antibody blood test; vaccinations alone will not suffice
NOTE: Early action on this item is required. Completion of the required vaccines AND required antibody test can take 6-8 months. It is recommended to have official proof of your entire vaccination series prior to applying to this program. Proof of the entire vaccination series AND the follow-up HepB Surface Antibody Titer will be required by August 2022. In the event of a NON-positive Antibody Titer, proof of the original vaccine series, proof of the NON-positive antibody test, AND at least 2 additional vaccines must be submitted by September 2022. Additional documentation may also be required.
 - **MMR (Measles, Mumps, Rubella)*** – positive antibody titers for all three components or 2 vaccines
 - **Varicella (Chicken Pox)*** – positive antibody titer or 2 vaccines
 - **Tdap (Tetanus, Diphtheria and Pertussis)*** – 1 dose within the last 10 years and updated every 10 years
 - **COVID-19*** – proof of being fully vaccinated; documentation must include the vaccine manufacturer(s)
 - **Negative Tuberculosis (TB) test*** – Either a Negative TB Blood Test (Quantiferon Gold or T-Spot) or Negative 2-Step TB Test (involves 2 separate Negative TB skin tests completed 1-3 weeks apart); must have been completed within the last 12 months and updated annually while in the program
 - **CPR** – ONLY AMERICAN HEART ASSOCIATION’S (AHA) BLS PROVIDER CPR CERTIFICATION will be accepted. Alternative CPR certifications, even through AHA, will be denied. CPR must be kept current.
- * Must include either a copy of an official immunization card or original immunization/medical screening document. Official documentation must include: 1) Your name, 2) Date of Birth, 3) Name of administering Agency or provider, 4) Name of injection, test, etc., and results, if applicable, 5) Date of injection, test, etc., 6) Healthcare Provider’s signature, official stamp or letterhead.*
- **RECOMMENDED IMMUNIZATIONS:** Submission of the following be recommended but not required. Some clinical sites in Oregon may require one or all of these for clinical placement acceptance, thus not completing these might result in fewer clinical placement options while in the program.
 - **Flu shot** – Current influenza vaccine & updated annually
 - **Polio** – positive antibody titers or 3 vaccinations
 - **COVID-19 Booster** – Completed per CDC guidelines
 - **DRUG TEST:** Passing the LBCC approved drug test will be required (estimated cost is \$55).
 - **MANDATORY ORIENTATION:** Attend the Mandatory Orientation during the first week of Fall Term
 - **LBCC ADMISSION FEE:** Students who have never paid the admission fee will be required to prior to program start
 - **ADDITIONAL COSTS:** Admitted students will receive additional details. Student costs may include the completion of a N-95 mask Fit screen/test through an Occupational Medicine facility (est. cost: \$70 - \$275) and the purchase of field specific student liability insurance (costs vary).



| | | | |
|-----------------|------------|-------|-------------------|
| _____ | _____ | _____ | _____ |
| Last Name | First Name | MI | Student ID Number |
| _____ | | | _____ |
| Mailing Address | | | Phone Number |

LBCC offers students the opportunity to **charge tuition and fees** to their student account. In addition, other eligible charges such as books, supplies, library fines, and parking fines can accumulate on your student account. Federal aid may not be applied to these other charges without the express consent of the student. Your signature below allows the college to deduct these other charges from your federal and state aid **each term** as it is posted to your account. Any remaining funds are then refunded back to you for your non-college expenses (housing, transportation, childcare, and other related expenses). Federal aid cannot pay for late fees.

YES – I Do Want LBCC to apply my federal/state aid funds to pay other charges that may accumulate on my student account. For example: bookstore charges, library fines, parking fines, etc. I will be able to charge books in the Campus Bookstore if I have sufficient aid remaining after deducting current term tuition and fees.

NO – I Do Not Want LBCC to apply my federal/state aid funds to pay other charges that may accumulate on my student account. By checking 'NO', I understand that **I AM** responsible for paying all of my charges on my student account. I will **NOT** be able to charge books in the Campus Bookstore. If I fail to pay, I will be responsible for all late fees on my student account.

Read and Initial

- ___ I understand that my original aid offer will be packaged based upon full-time enrollment (12 or more credits). However, if I am not enrolled full-time, my financial aid disbursement will be adjusted based upon my actual enrollment level at the time of disbursement. Financial aid is disbursed the **2ND week** of each term.
- ___ I understand that I must be enrolled in a **minimum of 6 credits to be eligible to receive any loan** funds I have accepted.
- ___ I understand that my account must be paid in full before I can register for subsequent terms.
- ___ I have read and understand my responsibilities regarding the Financial Aid Satisfactory Academic Progress (SAP) Policy and will review my status at the end of each term. https://www.linnbenton.edu/tuition-and-admission/financial-aid/documents/2021/SAP_2021.pdf
- ___ I understand that I **must attend the classes** for which I am receiving aid.
- ___ I understand that if I do not complete at least 1 credit hour in a particular term, or if I do not attend classes for more than **60% of the term**, I may be required to repay a portion of my federal aid. <https://www.linnbenton.edu/tuition-and-admission/financial-aid/repayment.php>
- ___ I understand dropping/withdrawing from class(es) after the Add/Drop date is treated the same as not attending or not completing the class(es) and may have a negative impact on my SAP status.
- ___ I will immediately notify the Office of Financial Aid if I **receive educational assistance from other sources**, such as scholarships or assistance from state or local agencies.
- ___ I will immediately notify the Office of Financial Aid if I **transfer to or from another school** during the aid year.
- ___ I understand the Office of Student Access and Completion (OSAC) administers the Oregon Opportunity Grant and the Oregon Promise Grant. Rules regarding the awarding and disbursing of these funds are determined by OSAC not LBCC.
- ___ I understand I may update my decision anytime with the Office of Financial Aid.

By signing below, I acknowledge that I have read & understand the above statements & I request that the Office of Financial Aid apply my decision accordingly.

Student Signature _____ Date

LBCC Statement of Nondiscrimination

For accommodations requests, contact the Center for Accessibility Resources (CFAR) at 541-917-4789 or cfar@linnbenton.edu at least three business days in advance. LBCC does not discriminate based on any protected status in its programs or activities. For more information, visit linnbenton.edu/nondiscrimination. Rev. 05/05/2022



Office of Financial Aid & Veterans
6500 Pacific Blvd. SW
Albany, Oregon 97321
linnbenton.edu/financial-aid

14-JAN-2022

Hello Sample Student,

Oregon law requires that Linn-Benton Community College provide you with an update of your estimated current student loan debt. This information is being provided before you take on additional debt. We encourage you to decline loans whenever possible and to borrow the lowest amount possible to complete your education.

Your estimated total student loan balance is \$23,191. This is only an estimate based on the best information we had for your loans as of the day this notice was sent. You may have additional loans that are not yet reflected in this total. For your current actual student loan balance, please visit and log-in to the Federal Student Aid website at studentaid.gov.

Student loan interest rates are different depending on the type of loan and when you borrowed it. To see your specific interest rates, please visit and log-in to the Federal Student Aid website at studentaid.gov.

Student loans have overall limits for how much you may be eligible to borrow. Limits are based on the type of program you are studying, your dependency status on the FAFSA, need level and the length of time you have been in school. You may not qualify for the maximum amount of any particular category. Based on your loans and dependency status, you have borrowed the following percentages:

| | |
|--|---|
| Federal Subsidized Stafford Loan: | <ul style="list-style-type: none">• Your federal subsidized loan has a maximum limit of \$23,000 for students.• You have borrowed \$11,500 in subsidized loan(s)• This is 50.00% of your limit. |
|--|---|

| | |
|--|---|
| Federal Unsubsidized Stafford Loan: | <ul style="list-style-type: none"> Your federal subsidized and unsubsidized loans have a combined maximum limit of \$57,500 for Independent students. You have borrowed \$11,691 in unsubsidized loan(s). Your combined total in unsubsidized/subsidized loans is \$23,191. This is 40.33% of your limit. |
| Current borrowing limits | <ul style="list-style-type: none"> Dependent Student \$31,000 Independent Students \$57,500 |

The Payment Chart below show ranges of possible monthly payment amounts and the total amount you may pay for your student loans based on your current debt.

| Loans | 3.50% | | | 4.45% | | | 6.80% | | |
|---------------|---------|--------|-----------|---------|--------|-----------|---------|--------|-----------|
| | Monthly | Months | Payoff | Monthly | Months | Payoff | Monthly | Months | Payoff |
| 3,500 | 50.00 | 79 | 3,920.53 | 50.00 | 82 | 4,059.75 | 50.00 | 90 | 4,471.03 |
| 4,500 | 50.00 | 105 | 5,227.44 | 50.00 | 110 | 5,485.55 | 52.00 | 120 | 6,203.31 |
| 5,500 | 55.00 | 105 | 6,512.16 | 57.00 | 120 | 6,820.19 | 64.00 | 119 | 7,559.48 |
| 6,500 | 65.00 | 119 | 7,696.27 | 68.00 | 119 | 8,040.79 | 75.00 | 120 | 8,966.09 |
| 7,500 | 75.00 | 119 | 8,880.33 | 78.00 | 120 | 9,291.87 | 87.00 | 119 | 10,322.09 |
| 9,500 | 94.00 | 120 | 11,271.57 | 99.00 | 119 | 11,763.61 | 110.00 | 119 | 13,084.71 |
| 10,500 | 104.00 | 120 | 12,455.64 | 109.00 | 120 | 13,014.76 | 121.00 | 120 | 14,491.70 |
| 12,500 | 124.00 | 120 | 14,823.69 | 130.00 | 120 | 15,486.48 | 144.00 | 120 | 17,254.48 |
| 23,000 | 228.00 | 120 | 27,279.29 | 238.00 | 120 | 28,532.00 | 265.00 | 120 | 31,745.99 |

| | | | | | | | | | |
|---------------|--------|-----|---------------|--------|-----|---------------|--------|-----|---------------|
| 31,000 | 307.00 | 120 | 36,774. 93 | 321.00 | 120 | 38,449. 55 | 357.00 | 120 | 42,797. 04 |
| 57,500 | 569.00 | 120 | 68,221. 74 | 595.00 | 120 | 71,329. 99 | 662.00 | 120 | 79,390. 70 |

As of today, \$10,347 in tuition and fees has been paid to Linn-Benton Community College for your account.

Sincerely,
LBCC Financial Aid Office



Financial Aid & Veterans

6500 Pacific Blvd. SW
Albany, OR 97321
(541) 917-4850

SSN: /

Term/Year:

Dear :

Date:

Based on information that we received, you either completely withdrew from school or did not satisfactorily complete at least one credit hour that you attempted this term. Consequently, as a federal aid recipient, you are subject to the US Department of Education's Return of Aid Funds regulation.

The Return of Aid regulation assumes that students "earn" their financial aid over the course of a term by attending and participating in classes. It is assumed that you have not earned all of your financial aid until you have attended classes for 60% or more each term.

If you withdraw from your classes or stop attending all of your classes before attending/participating at least 60% or more of the term, then you have not earned all of your federal financial aid for the term. Federal Regulations require that you repay the "unearned" portion of the aid.

UNPAID LBCC TUITION AND FEES

The college is also required to return financial aid funds that you used or could have used to pay your tuition and fees at the same percentage rate that was used to determine your unearned aid funds. Based on an unearned percentage of **0%** the college must return to the federal government **\$00** in Loan/Grants.

Because your withdrawal or date of last attendance occurred after the first week of the term (the last day to refund 100% of your tuition and fees per college policy), the college will bill you directly for the amount of the tuition and fees it was required to return to the federal government. You may not re-enroll at LBCC until the unpaid LBCC tuition and fees have been repaid.

If you have already enrolled for the next term, the business office will expect for you to have your account paid in full by the end of the first week. Stated simply, if you incur debt during one term, but are pre-registered for the next term this will result you owing for two terms. You must settle your current account. Failure to act upon this debt obligation to LBCC will result in you owing. (Tuition is due the 2nd week of each term.)

UNEARNED FEDERAL AID

Based on your withdrawal date or dates of last attendance that we received from your instructors, you attended **0%** of the term. Therefore, the unearned federal aid disbursed to your student account, less tuition and fees is **\$00** in federal **PELL** Grants.

THE TOTAL AMOUNT THAT YOU MUST REPAY IS: **\$00**

Linn-Benton Community College is an equal opportunity educator and employer.

PLEASE CONSIDER THIS LETTER A BILL. The college will actively seek collection of this debt. A copy of the worksheet used to calculate the amount of the aid you must repay to the federal government and to the college is available in the Financial Aid Office, should you wish to review it.

Information You Should Be Aware of:

1. You owe an overpayment of Title IV funds
2. Your eligibility for additional Title IV funds will end if you fail to take **positive action by the 45th day** from the date of this letter. You will not be eligible for Federal financial aid at all Title IV institutions in the United States, if you fail to respond to this correspondence
3. There are **three positive actions** you can take to extend your eligibility for Title IV funds **beyond 45 days:**
 - a) Repay the overpayment in full to the school
 - b) Sign a repayment agreement with the school. **Two years is the maximum time a school may allow for repayment.** If you violate the terms of your agreement with Linn- Benton Community College (LBCC) for repayment, your account will be immediately referred for collection (to the Department of Education Resolution Group)
 - c) You may sign a repayment agreement with the Department of Education
4. If you fail to take one of the positive actions during the 45-day period, LBCC will report your overpayment to the National Student Loan Database System (NSLDS) and refer you to the Default Resolution Group for collection
5. You are strongly encouraged to contact LBCC to discuss your options

Payments should be directed to:

Business Office
Linn-Benton Community College
6500 Pacific Blvd. SW
Albany, Oregon 97321

The Business Office is located in the Calapooia Center building, room 130, telephone number (541) 917-4312.

Should you have any questions regarding your return of funds federal calculation please contact the Financial Aid Office at 541-917-4850.

Sincerely,

LBCC Financial Aid Office

Linn-Benton Community College is an equal opportunity educator and employer.



COLLECTION ANALYSIS

Fall 2015

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Linn-Benton Community College
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1 ABSTRACT

The purpose of this collection analysis is to ensure the Linn-Benton Community College (LBCC) Library's collection meets the needs of their patrons by providing reliable and up-to-date materials, representing a variety of opinions. This analysis will provide insight into the Library's physical collection. While academic libraries are typically less interested in the age of the material or their circulation, and more interested in significant, in-depth materials, smaller libraries tend to be more focused on the usefulness of their collection.

2 LBCC LIBRARY OVERVIEW

The LBCC Library provides resources and services for the instructional, research, and general information needs of students, faculty, staff, and local residents. The Library provides open spaces for collaborative work, multiple study rooms, and a beautiful reading room. Located in Willamette Hall on the main Albany campus, the Library offers a large collection of books, reserve textbooks, and multimedia items as well as drop in computer workstations and a computer lab. Online subscription databases provides patrons access to scholarly journal articles, electronic books, magazines, multimedia, videos, etc. Off campus access to these databases are available to LBCC students, faculty, and staff. Library staff members are available to provide help using the library and its resources on a drop-in basis at the circulation and reference desks, or during instructor-scheduled library classes.

2.1 MISSION

The Library is committed to providing resources, services and an environment that support the mission, goals and curriculum of the college¹.

The primary goals of the Library are:

- to support the instructional programs of the college.
- to enable the faculty and administrative staff to keep abreast of developments in their fields of interest.
- to provide access to information which is outside the scope of present instruction.
- to provide access to the public to resources and services.
- to train in information literacy.
- to provide an atmosphere conducive to study and research.

The Information Literacy Instruction program outcomes at LBCC state that students will:

- Find information using appropriate research tools and search strategies.
- Evaluate and select information using appropriate criteria.
- Use information appropriately and ethically.
- Use appropriate/current tools and technologies to create, produce and communicate.

¹ The Library's mission and goals are currently under review to realign with the larger college.

3 PATRON OVERVIEW²

In LBCC Library's Evergreen ILS patrons are categorized by student, employee and public. Students are individuals registered for credit courses at LBCC and through the English Language and Culture Institute (ELCI), employees are full and part-time faculty and staff members, and public are those unaffiliated with LBCC living in Linn and Benton Counties, as well as LBCC alumni. These divisions are assigned when an account is created, and give the patron varying permissions (i.e. only employees can check out "Staff Checkout Only" items). However, for the most part these divisions are beneficial for internal awareness and information.

On average each year, 2118 student, 195 employee and 30 public patrons are active in the LBCC Library system³. Thus the patron population can be described as 90.4% student, 8.3% employee and 1.3% public (See Figure 1: Patron Population Distribution). Meanwhile, circulations distributed by patron type show students with 80.9% of circulations, employees with 17.6% of circulations, and public with 1.4% of circulations (See Figure 2: Circulations by Patron Type).

Figure 1: Patron Population Distribution

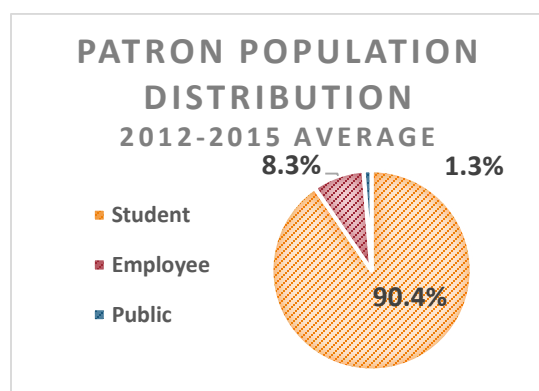
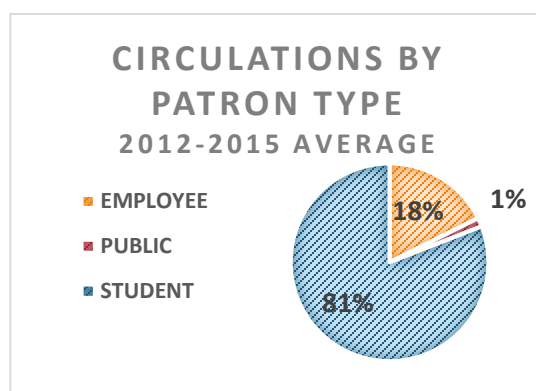


Figure 2: Circulations by patron type



Interestingly, employees have the largest circulations per person out of all patron types, with almost 12 checkouts per person. This is followed by public patrons with about six, and students with about five checkouts per person. Note that circulations per person is the average circulations per person, and that some people checkout more, while others less.

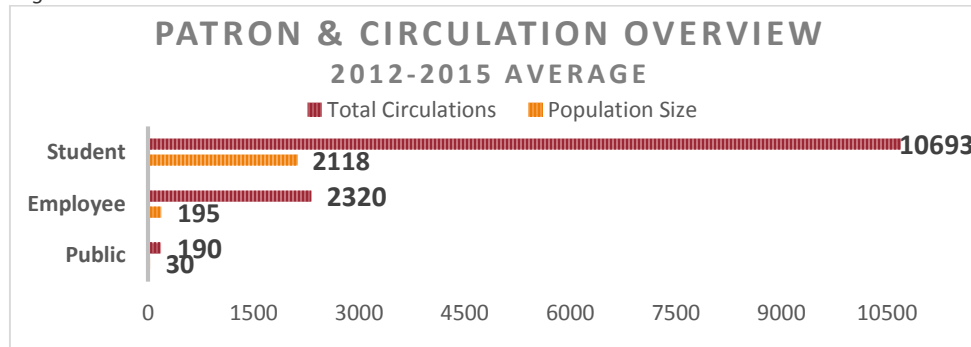
Due to the mission of the Library and LBCC to serve students it makes sense they are the Library's largest patron segment, both in terms of number of patrons and circulations. However, public patrons do have a potential to be larger than either group, especially with the new Linn Libraries Consortium lending, which 3.3 LBCC Public Patrons will expand upon. What is most interesting from the above data is that employees checkout more items per person than any other patron group. A few reasons for this might be the use of items for instruction

² The statistics discussed in this section are based on the past three academic school years (2012-2013, 2013-2014, and 2014-2015) starting in September and ending in June. This month range depicts a more stable and consistent illustration of the Library's patrons, as summers are not representative of normal use. Also, most statistics are based on a three year average to present a typical picture of the Library and college population.

³ These are active Library patrons who checked out an item during the academic year. The total number of patrons in Evergreen is greater.

purposes either for reference in lesson plan creation or research, or even having a set of books available for a specific class session. More research would be needed to identify faculty checkout behavior to identify trends in usage.

Figure 3: Patron & Circulation Overview



The Library has experiences about a 25% decrease in unique actively circulating patrons over the past 3 academic years (See Figure 4: Patron Population Change). Overall, the number of students and employees at LBCC have decreased over the past three years by 10% and 7%, respectively. With this decrease in potential population the library should expect to see a decrease as well. However, some of the decrease in student and employee patrons could be attributed to an increased usage of online Library resources⁴. Understanding the decrease in public patrons is more difficult, strictly based on the fact that the number of potential patrons grows each year with new alumni, and fluctuates based on the surrounding county population. However, this could be attributed to a lack of service awareness.

Figure 4: Patron Population Change

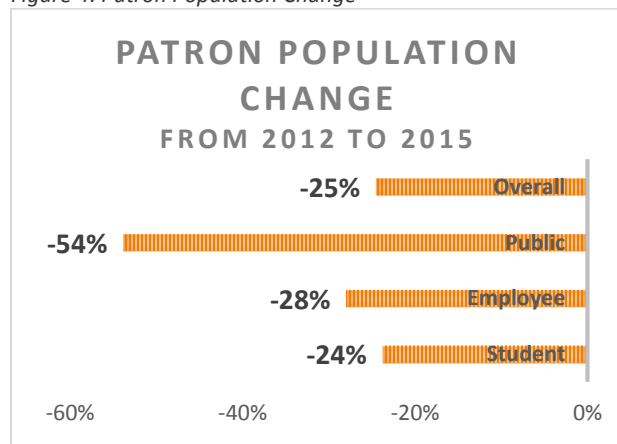
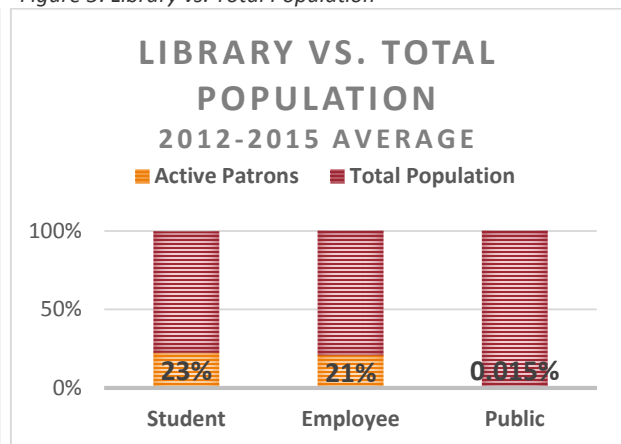


Figure 5: Library vs. Total Population



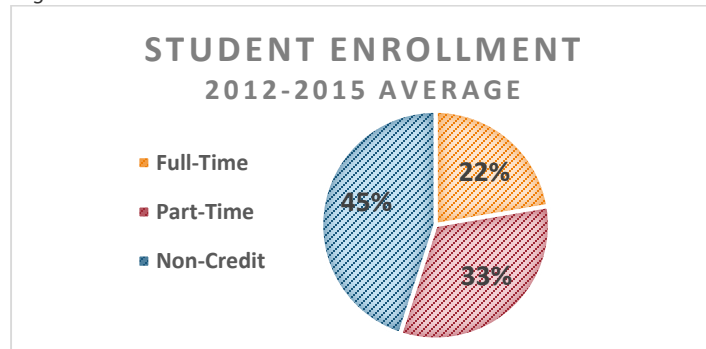
3.1 LBCC STUDENTS

LBCC has 20,880 students enrolled each year, on average, which includes both full and part-time students, enrolled at the main campus and centers. The average full-time equivalent student enrollment for the past three academic years was 9,394 students (See Figure 6: Student

⁴ An analysis of online use would either confirm or refute this statement.

Enrollment). Some students may never come to the main campus, however they still have access to Library resources and could have materials delivered to their center.

Figure 6: Student Enrollment



LBCC has a very small minority population, making up only 14% of the total student population, or at least of those who responded. More than half of LBCC students are between the ages of 18 and 25 (56%), and the majority live in Linn and Benton Counties (78%). Note, LBCC does serve international populations both through the ELCI and dual degree programs (Linn-Benton Community College, 2015b).

Figure 7: Distribution of Student Minorities

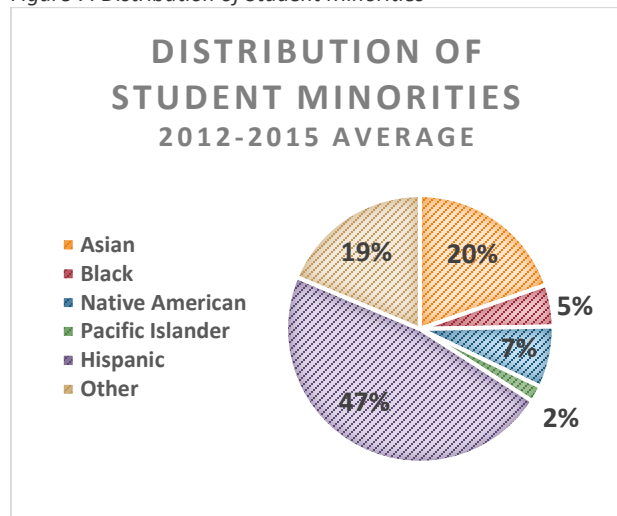
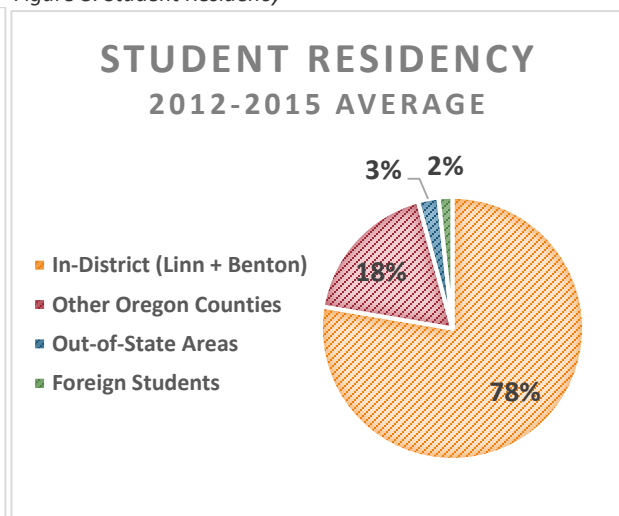


Figure 8: Student Residency



Popular programs at LBCC are Certificates, Associates of Applied Science, Arts, General Studies and Science (Linn-Benton Community College, 2015a). 10,658 students on average, over the past three academic years, have been enrolled with a designated major, while 2,618 were non-degree seeking. The top five programs with the most enrollment were Engineering, Business Administration, General Studies, Biological Science, and Exercise and Sport Science.

Unfortunately, only 10% of students are actively checking items out at the LBCC Library. While the number of circulations per student on average is 5, if you include the entire student population this number drops to 0.5 circulations per student each academic year. The low percentage of students using Library materials could be attributed to their geographic location at a distant center, which should be studied further to determine what might account for this difference. It could even be attributed to a lack of need for items while enrolled part-time,

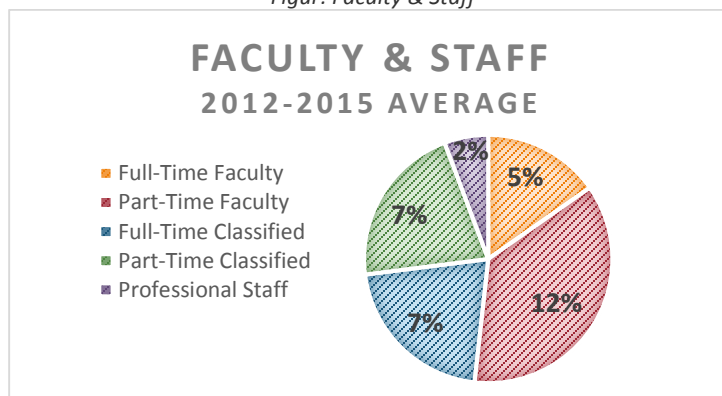
maybe only for physical items. Maybe classes are requiring less physical items during their tenure at LBCC. Although, the Library does include a wide variety of materials, including personal interest items, which can be checked out for non-academic purposes.

3.2 LBCC EMPLOYEES

The average yearly breakdown of employees are 481 faculty members (142 full-time, 339 part-time), 395 classified staff (197 full-time and 198 part-time) and 53 professional staff (See Figure 9: Faculty & Staff) (Linn-Benton Community College, 2015b). The average yearly total of people employed are 928 people, which translates to 21% of employees are active LBCC Library users.

For the past three years there has been a 19:1 ratio of students to faculty. During the 2013-2014 academic year 40% of all employees were male and 60% were female, although these percentages have been getting closer to equal over the past five reported years (Linn-Benton Community College, 2015b). Of all LBCC employees, in 2013-2014, only 11% identified as a minority population (Linn-Benton Community College, 2015b). LBCC is an equal opportunity employer, even though these statistics are not completely representative.

Figur: Faculty & Staff



3.3 LBCC PUBLIC PATRONS

The LBCC Library is open to alumni and Linn and Benton County residents, who can create an account by coming into the Library. Public patrons in the LBCC Library system represent .015% of the potential Linn and Benton service district population, which does not include alumni, which would mean the LBCC public patrons make up an even smaller percentage of the potential population. Starting Winter 2016 a new partnership of lending with the Linn Libraries Consortium will be implemented, which will make our items more easily accessible for the larger public population, right from their home library. Taking note of this statistic now before the implementation will help the Library track the increase in public patron checkouts.

Since the Library does not collect patron specific information, a larger perspective of Linn and Benton Counties is helpful. Linn County has a population of around 116,871 people and Benton County's population is estimated at 85,501 people (Census Reporter, 2013a; Census

Reporter 2013b)⁵. Educationally, 88.9% of Linn County residents and 95.2% of Benton County residents are high school graduates or higher (Census Reporter, 2013a; Census Reporter, 2013b). Economically, 55% of Linn and 51% of Benton residents have a household income under \$50,000 a year; both rates are higher than the Oregon average (Oregon Explorer, 2014a; Oregon Explorer, 2014b). Demographically, both Linn and Benton Counties are equally male and female, with a large white population, and small minority population (Oregon Explorer, 2014a; Oregon Explorer, 2014b)⁶. The median age in Linn County is 39 and 32 in Benton County, and at least 60% of both counties are made up of people ranging from 18 to 60 (Oregon Explorer, 2014a; Oregon Explorer, 2014b).

Evergreen does have the ability to gather statistical information about patrons in the system. However, this feature is not currently activated. If it were activated there are a number of statistics that might be interesting for an analysis of public patrons. Gathering information about how far away from the Library public patrons live, via specific address or zip code, would illustrate how far public patrons are traveling to utilize physical library materials. Increasing the number of metrics gathered with in Evergreen will allow the Library to compare publically available demographic information. Another metric that would allow for an interesting analysis is the public patron's educational attainment. This metric would highlight whether educational levels affect who use the collection, and the level of their use. This would not really affect collection development, however it might affect how the Library publicizes services.

4 COLLECTION

4.1 OVERVIEW

The LBCC Library is made up of a wide variety of subjects, and also material types, including:

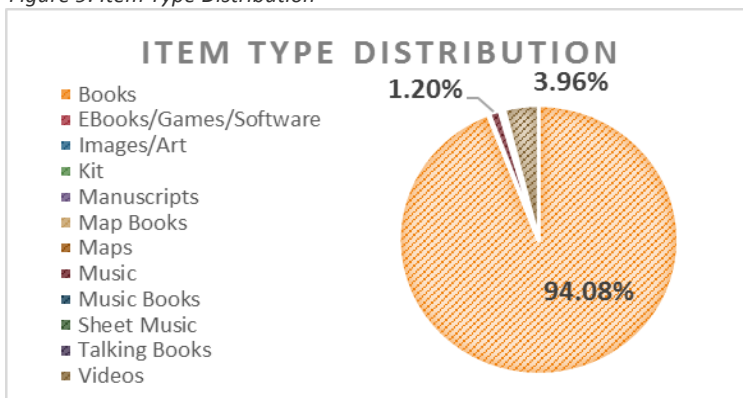
- Books
- EBooks/Games/Software
- Images/Art
- Kit
- Manuscripts
- Map Books
- Maps
- Music
- Music Books
- Sheet Music
- Talking Books
- Videos

The majority of the LBCC Library collection is made up of books, comprising 94% of the collection. The next largest material type are videos, followed by music. All other material types make up less than 0.76% of the collection. As of the end of Spring Term 2015 the LBCC Library had a total of 32,504 physical items available in the stacks. These items have seen a total of 121,442 circulations since LBCC's use of an electronic ILS.

⁵ Albany has an estimated population of 50,239 people, which is where the main campus is located. The three centers located in Corvallis, Lebanon, and Sweet Home, have populations of 54,341, 15,500, and 8,938 people, respectively with populations corresponding to attendance of the center (Census Reporter, 2013a; Census Reporter 2013b).

⁶ Over 80% of Linn and Benton County residents are white, and less than 10% are Hispanic and Asian (Oregon Explorer, 2014a; Oregon Explorer, 2014b).

Figure 9: Item Type Distribution



4.2 COST

As for the cost of materials, 91% of items in the Library cost less than \$40, while the average item is valued at \$35.49. Granted, the default cost of items cataloged is set at \$30, unless an item costs more, at which point the cost is manually entered. The cost per use of all materials is \$9.34. There are a number of reasons why this number might be so large. First, high priced items are often “Library use only” items, and thus will not have any circulations, skewing the data. Second, the Library reviews and weeds older and damaged items yearly, replacing them with newer editions or updated items. Thus, newer materials will most likely not have as many circulations as older materials, due to pure opportunity. Two item types cost more than the average, eBooks/games/software⁷ and videos. Spending more money on videos is reasonable, to an extent, because they have the second largest percentage of circs; however, eBooks/games/software see significantly less circs.

4.3 CIRCULATIONS (CIRCS)

Over the past three academic years, the Library has seen almost a 9% increase in circs⁸. The second full month of each term sees the most checkouts, with May having the highest circs (859 average). The Library sees an average of 6,376 circs annually (including summer term), with 89% of these coming from the stacks (not including reserves). Also, the average publication year of items checked out is 1998. Books see the most circs, followed by videos, and music, although there is an 83% difference between the total number of circs of books and videos. These statistics do not include Reserve item circs, since they are not entirely representative of the collection usage.

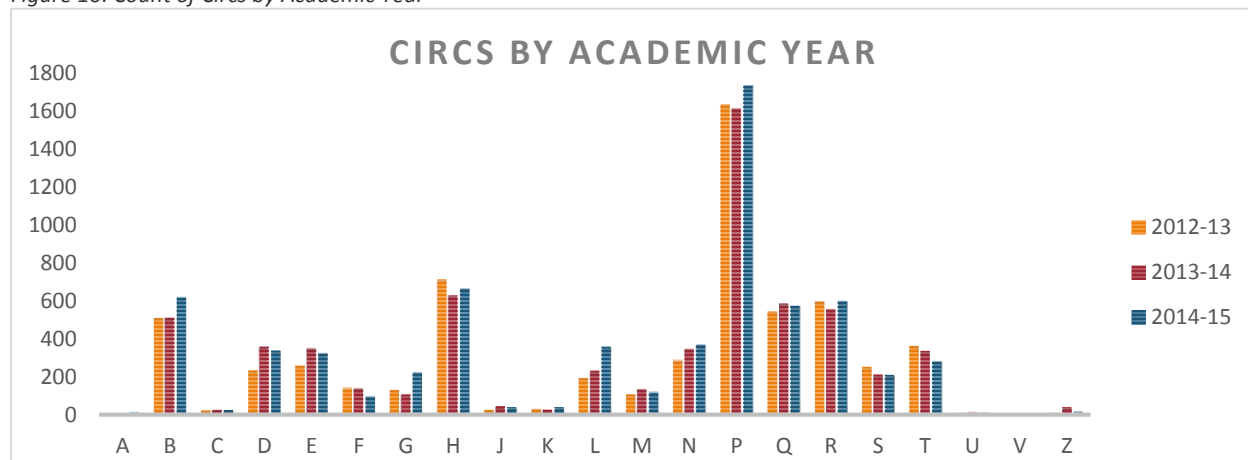
Circulations are somewhat proportional to the number of items in the subject (Refer to Table 1: Collection Overview and Figure 12: Circ Comparison). There is only a small variance among the top five subjects that circulate the most, and the number of items in that subject.

⁷ eBooks/games/software are a very small percentage of the collection, only 0.07% in fact. Also, these items only make up 0.03% of circulations each year. Even though this title includes eBooks in reality this includes very few if any eBooks, since they are not included in the Evergreen catalog, which can be confusing and deceiving.

⁸ This is a unique statistic when compared with the overall decrease in active patrons.

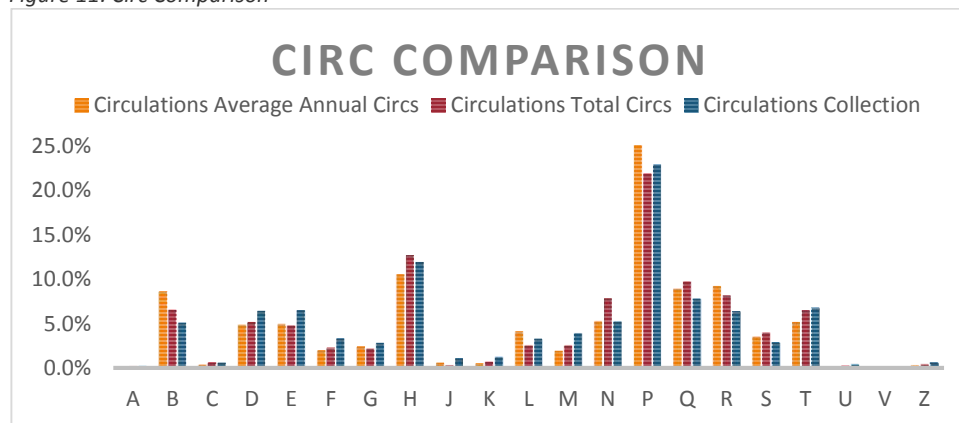
However, there are two subjects that are disproportionate when it comes to the percentage of the total collection and annual circulations; Medicine (R), and Fine Arts (N)⁹. Knowing LBCC has a large nursing student population (and other smaller areas of study that overlap), and a variety of art courses which require students to refer to art books as art inspiration, the change in rank makes sense.

Figure 10: Count of Circs by Academic Year



Another interesting comparison are the percentage of annual circs against the percentage of total circs (since circ records began) by subject. This highlights specific subjects that either have been more or less popular during the last three academic years, compared to their usage over time. Subjects that have been used more in recent years are Philosophy, Psychology and Religion (B), History of the Americas (E), Geography, Anthropology and Recreation (G), Political Science (J), Education (L), Language and Literature (P), and Medicine (R). Of these subjects History of the Americas (E), and Political Science (J) are the only subjects not ranked as a top program (See 5.2 Students by Subject). Also, Philosophy, Psychology and Religion (B) is the only highly acquired subject (See 4.6 Acquisitions). These subjects with higher recent circulation, for the most part, represent subjects covered either through popular program or course level work.

Figure 11: Circ Comparison



⁹ Last year the Ns were reviewed as part of the five year review plan, thus there are quite a few number of items. It would be good to run a report in a year's time to see if the circulations vary. Also, some of the Rs will be moving to the new Health Occupations Building and the Library will be increasing this section.

| Row Labels | # of Items | % of Total Collection | Total Circs | % of Total Circs | Average Publication Date | Average Annual Circulations | % of Annual Circulations |
|---|---------------|-----------------------|----------------|------------------|--------------------------|-----------------------------|--------------------------|
| A - General Works | 90 | 0.28% | 307 | 0.25% | 1972 | 8 | 0.1% |
| B - Philosophy, Psychology & Religion | 1,654 | 5.09% | 7,980 | 6.57% | 1996 | 510 | 8.9% |
| C - Auxiliary Sciences | 192 | 0.59% | 793 | 0.65% | 1984 | 26 | 0.4% |
| D - World History | 2,090 | 6.43% | 6,287 | 5.18% | 1987 | 290 | 5.1% |
| E - History of the Americas | 2,117 | 6.51% | 5,841 | 4.81% | 1986 | 288 | 5.0% |
| F - History of the Americas | 1,090 | 3.35% | 2,798 | 2.30% | 1983 | 118 | 2.1% |
| G - Geography, Anthropology & Recreation | 926 | 2.85% | 2,690 | 2.22% | 1997 | 135 | 2.4% |
| H - Social Science | 3,876 | 11.92% | 15,404 | 12.68% | 1997 | 591 | 10.3% |
| J - Political Science | 361 | 1.11% | 444 | 0.37% | 1999 | 31 | 0.5% |
| K - Law | 419 | 1.29% | 917 | 0.76% | 2000 | 31 | 0.5% |
| L - Education | 1,071 | 3.29% | 3,155 | 2.60% | 2002 | 234 | 4.1% |
| M - Music | 1,281 | 3.94% | 3,143 | 2.59% | 2000 | 107 | 1.9% |
| N - Fine Arts | 1,715 | 5.28% | 9,516 | 7.84% | 1985 | 314 | 5.5% |
| P - Language & Literature | 7,439 | 22.89% | 26,506 | 21.83% | 1988 | 1,486 | 26.0% |
| Q - Science | 2,540 | 7.81% | 11,839 | 9.75% | 1993 | 503 | 8.8% |
| R - Medicine | 2,077 | 6.39% | 9,903 | 8.15% | 2001 | 530 | 9.3% |
| S - Agriculture | 946 | 2.91% | 4,894 | 4.03% | 1990 | 199 | 3.5% |
| T - Technology | 2,210 | 6.80% | 7,909 | 6.51% | 1993 | 287 | 5.0% |
| U - Military Science | 153 | 0.47% | 408 | 0.34% | 1997 | 12 | 0.2% |
| V - Naval Science | 45 | 0.14% | 155 | 0.13% | 1982 | 1 | 0.0% |
| Z - Bibliography, Library Sci & Info Resources | 212 | 0.65% | 553 | 0.46% | 1993 | 23 | 0.4% |
| Grand Total | 32,504 | 100.00% | 121,442 | 100.00% | 1992 | 5,724 | 100% |

4.4 TURNOVER RATE

According to the Library Research Service (LRS), “Turnover Rate relates the number of materials checked out relative to the size of the collection” (2013). Essentially, it is the number of materials circulated divided by the number of materials held. Turnover rate provides insight into the use of the collection, by indicating how much of the collection is used. The LBCC Library’s average turnover rate is 3.74 circulations per item¹⁰.

$$\text{Turnover Rate} = \frac{\text{Total Circulations}}{\text{Number of Items Held}} = \frac{121,442}{32,504} = 3.74 \text{ circulations per item}$$

4.5 PUBLICATION DATE

The average publication date of an items located in the stacks is 1992, or 23 years old. The oldest section in the library, averaging a publication date of 1972, is General Works (A), which makes sense since this section is mostly made up of encyclopedias, dictionaries and collected works. The subject with the newest publication date average is Education (L) with a 2002 average. Since part of the Library mission is to support LBCC faculty, and keep them abreast of developments in their field, there is no surprise this collection is fairly new. Plus, LBCC faculty are teaching faculty rather than research faculty, which emphasizes their interest in educational topics. However, it is surprising that other sections do not have as early of publication dates. Subjects such as Medicine, Science, Law and Technology might be expected to have newer publication dates based strictly on how often their fields change.

4.6 UNIQUE ITEMS

There are 104 unique items in the LBCC Library, or rather 0.32% of our collection is unique. Unique items are items in OCLC which two or fewer libraries own. This information is important for the Library when reviewing the collection, to ensure patrons still have access to these items, which would otherwise be difficult to interlibrary loan.

Table 1: Unique Items

| Subject | Items |
|---------------------------------------|------------|
| B - Philosophy, Psychology & Religion | 4 |
| D - World History | 1 |
| E - History of the Americas | 3 |
| F - History of the Americas | 3 |
| H - Social Sciences | 5 |
| J - Political Science | 1 |
| L – Education | 11 |
| M - Music & Books on Music | 17 |
| N - Fine Arts | 7 |
| P - Language & Literature | 12 |
| Q - Science | 11 |
| R - Medicine | 6 |
| S - Agriculture | 6 |
| T - Technology | 17 |
| Grand Total | 104 |

¹⁰ This calculation was based on the number of items at the 2014-2015 academic year. Since it is difficult to get a snapshot of total items in the collection each year, due to deleted items, this provided an approximation.

4.7 ACQUISITIONS

On average, the Library adds 1,382 items to the collection each academic year (Fall through Summer). Items purchased during an average academic year are checked out 1,231 times each year, which translates to 0.89 circulations per item. The average publication date of items added is 2008. Also, new items account for 19% of all average annual circulations.

For a comparison of items added against the larger collection see Table 3: Acquisition Comparison. The subjects most and least added closely correlate to existing collection coverage. Philosophy, Psychology and Religion (B), from the top subjects added, is the only subject that is not reflected across collection statistic rankings. The top five subjects in this category see about one circulation per item added, while the lowest five subjects see less than 0.3 circulations per item added. Essentially, when items are added in these top categories (Agriculture – S, Language & Literature – P, Philosophy, Psychology & Religion – B, Education – L, Technology – T, and Fine Arts – N) they will circulate at least once. Interestingly, the subjects seeing the most items added are Language and Literature (P), Social Sciences (H), and Philosophy and Religion (B), while students, if categorized by subject¹¹, are more often associated with Technology (T), Science (Q), and Medicine (R).

Table 2: Acquisitions Comparison

| Rank | Acquisitions | Collection Size | Count of Average Acquisition Circs | Total Circulations | Turnover Rate of Acquisitions |
|------|---------------------------------------|-----------------------------|---------------------------------------|---------------------------------------|---------------------------------------|
| 1 | P – Language & Literature | P – Language & Literature | P – Language & Literature | P – Language & Literature | S – Agriculture |
| 2 | H – Social Sciences | H – Social Sciences | B – Philosophy, Psychology & Religion | H – Social Sciences | L – Education |
| 3 | B – Philosophy, Psychology & Religion | Q – Science | H – Social Sciences | R – Medicine | P – Language & Literature |
| 4 | Q – Science | T – Technology | L – Education | B – Philosophy, Psychology & Religion | B – Philosophy, Psychology & Religion |
| 5 | T – Technology | E – History of the Americas | Q – Science | Q – Science | R – Medicine |

The above table compares the top acquired subjects with the largest subjects according to collection size, count of average acquisition circs, total collection size and the turnover rate of acquisitions, based on averages and information from the past three academic years. Subjects acquired more frequently are highlighted across the table to identify trends, and

¹¹ The Top 100 LBCC Programs were associated with subject areas to highlight subjects of most value to students. See 5.2 Students by Subject for additional information.

identify subjects which are outside the acquisition trends. The last column was calculated with the following equation:

$$\text{Probability Acquisition Will Circulate} = \frac{\text{Average Acquisition Circulations}}{\text{Acquisitions}}$$

4.8 INTERLIBRARY LOANS (ILLS)

During the 2014-2015 academic year 489 items were borrowed via interlibrary loan. These statistics are as close to the actual items that were requested as possible, although some did not have a LOC call number related to them, and others did not include complete call numbers. Two sections, Medicine (R), and Language and Literature (P) had the most items requested. Both of these subjects have high probabilities of circulating in the collection. While Language and Literature (P) is reflected by this usage in its size, Medicine (R) is not. Thus it is quite interesting that Language and Literature (P) still receives as many requests as it does, and that the Library has not increased the number of items purchased for Medicine (R). Many items were requested more than once, with quite a few having been requested two or three times. These highlight titles our students are finding valuable, for one reason or another, and areas where the present collection is lacking. This data gets more interesting when highlighting trends in item requests, either by subject, subject segment, or specific titles.

5 LBCC STUDENTS

5.1 ITEMS PER STUDENT

During the 2014-2015 academic year, the Library had 5.42 items per full-time equivalent (FTE) student, and 1.63 items¹² per student (full-time, part-time and non-credit). Over the past three years, the Library has averaged 5.1 items per FTE student. This difference is partially due to the fact that FTE student headcounts have declined. Also, we cannot pull a snapshot of total items in the collection for a given year, thus the number of items used to determine items per student was based on the number of items in the collection as of the end of summer 2015.

$$\text{Items per student} = \frac{\text{Number of Items}}{\text{Number of FTE Students}} = \frac{32,504}{5,999.87} = 5.42 \text{ items per student}$$

According to statistics available through the National Center for Education Statistics (NCES) from the "Academic Libraries Survey Fiscal Year: 2012," LBCC had 7.91 materials per FTE student (2012). The items counts differ slightly between the NCES survey and the above calculations due to the boundaries of this analysis. For instance, reserve and equipment items are not included in the item counts above. Looking at similar Oregon community colleges LBCC's collection was fairly comparable, in relation to items per student. However, LBCC was far below the 71 items per student average for the state of Oregon, and the 91 items per student national average, which largely are based on larger four-year universities (NCES, 2012).

¹² Items in this instance is defined as physical items outlined in 2.1 Overview.

5.2 PROGRAMS BY SUBJECT

To draw conclusions between students and subjects within the physical collection, the top 100 programs with the largest average student counts, for the past three academic years, at LBCC were identified. Then, the top 100 programs were associated with and translated into Library of Congress (LOC) subject areas, according to the LOC Classification schema¹³. Some programs covered a range of subjects, while others were associated with fewer subjects. For instance, journalism can be more closely related to a single subject area, while liberal studies covers a broader range of subjects. Also, subjects were associated with the program's field, rather than the broad range of courses that may be taken to complete a program¹⁴.

5.2.1 Top 100 Programs

The top 100 programs, or 100 programs with the largest average enrollment, when translated into subjects, meant every call number range was represented. This was not planned, however was an outcome of this translation and association process. For a full look at the top programs, and translation to subjects, see Support Documents: Programs by Subject.

Table 4: Top Programs highlights the top 100 programs with the most unique number of programs associated with them. This means that programs that were associated with multiple segments of a subject were only counted once. By counting only the unique programs the ranking shifted slightly, however the top three subjects remained the same. The top three subjects, with the greatest number of unique programs associated with them, are Technology (Ts), Social Science (Hs), and Medicine (Rs). These three subjects represent the 2nd (Social Science), 3rd (Science), and 4th (Technology) largest segments in the Library's physical collection. Interestingly, all three top subjects have the highest acquisition rates. As for circulations of items added, Social Sciences is the only top three subject, that is in the top five circulations of items added; Technology and Medicine still make the top 10.

Table 3: Top Programs

| | Top 100 Programs | Top 40 Programs |
|-----------|--|--|
| 1 | T – Technology | T – Technology |
| 2 | H – Social Science | Q – Science |
| 3 | R – Medicine | R – Medicine |
| 4 | Q – Science | H – Social Science |
| 5 | N – Fine Arts | G – Geography, Anthropology & Recreation |
| 6 | S – Agriculture | N – Fine Arts |
| 7 | G – Geography, Anthropology & Recreation | K – Law |
| 8 | K – Law | B – Philosophy, Psychology & Religion |
| 9 | L – Education | S – Agriculture |
| 10 | P – Language & Literature | P – Language & Literature |

¹³ The University of Michigan has done a similar, however more thorough process which can be found at: <http://www.lib.umich.edu/browse/categories/>.

¹⁴ For example, even though all students are required to take writing, writing was not included in the translation of program/major to subject area. The reasoning behind this is that there would be a lot of cross over, and subject/field specific is potentially more important for completing academic research in their area of focus.

5.2.2 Top 40 Programs

Narrowing the above statistics to just the top 40 programs, or programs with an average of 50 students, allows certain trends to be emphasized and new trends to be highlighted. The top three subject changed slightly, as Science and Social Sciences changed ranks. Thus, the top subjects among the top 40 programs are Technology (Ts), Science (Qs), and Medicine (Rs). The most popular three subjects from the top 40 programs appear in the top 10 lists of subject size, circulation, items added and circulations.

6 CONCLUSIONS & RECOMMENDATIONS

Taking into account the information compiled in this report, conclusions can be drawn about LBCC Library's physical collection, which lead to a number of recommendations. First of all, it would be beneficial if the unique items identified in the collection included a note in the item or record to ensure its preservation. With 104 unique items, this project would not be small, however it would alert those reviewing the collection of its status. Limiting the number of eBooks/games/software added to the collection would help balance out their minimal use. Also, a more thorough evaluation of these items prior to purchase and surveying who might use them would help increase their usage and balance their cost.

Reviewing the number of active public patrons again after the Linn Libraries Consortium sharing beings will be beneficial to both the Consortium and Library. Not only will this review highlight the success of the program, but also how public patrons use LBCC resources. While public patrons do not drive acquisitions, they might highlight sections of the Library that is important for LBCC to preserve, which other local libraries might be lacking.

An annual review of ILL titles would highlight potential titles to purchase for the collection. At the moment this is not part of the collection development model, however would be useful in identifying subjects students are not finding in the current collection. While this does not mean every title on the list should be purchased, repeating items or subjects should be noted and reviewed in connection with the larger Library collection. The following are subject specific recommendations.

6.1 AGRICULTURE (S)

Agriculture (S) while not a frequently acquired subject, has the highest probability of circulating among new acquisitions (See 3.6 Acquisitions). A book added to the collection in Agriculture (S) will experience around 1.55 circulations. Essentially, when items are added in this subject, they will circulate. This is an interesting comparison to the fact that Agriculture (S) only makes up 3.5% of annual circulations, and is less frequently ILLed than other subjects. One reason newer acquisitions might circulate is that their average publication date is seventeen years newer than those items in the stacks. Since there are a large number of students in programs associated with Agriculture (S), they may be required to reference current publications (See 4.2 Students by Subject). These statistics are emphasized by the fact that Agriculture makes up less than 3% of the physical collection.

Based on these facts, the number of new items purchased for Agriculture (S) should be increased, especially items with a newer publication date. Further analysis of this section could be useful in seeing which areas are the most outdated, and which areas circulate best. Then by comparing this information with statistics from acquisitions, and even ILLs, specific areas can be identified which should be highlighted when purchasing new items.

6.2 TECHNOLOGY (T)

Technology (T) is associated with the most LBCC programs, is the 4th largest subject and accounts for 5% of circulations. When items are acquired for this subject each item sees about one circulation in its first year, suggesting these are valuable items. Meanwhile, new items in Technology have an average publication date of 2008 while Technology (T) has an average publication date of 1993, a 15 year difference. Technology (T) is also a frequently ILLed subject.

A closer review of the oldest sections within Technology (T) would identify whether or not certain areas are appropriate to be dated. Essentially, some specific subjects within Technology (T) are still effective if they are older, such as photography (TR), arts and crafts (TT), and home economics (TX), even though the majority of Technology (T) is focused on engineering. However, digging even deeper into those subjects might highlight some short comings, for instance do the photography books cover new digital cameras or do they just cover composition and techniques. In turn, comparing this with the subjects frequently ILLed might reinforce conclusions. Since items added to Technology (T) tend to be more valuable, a subject specific analysis would help identify which sections are really needing updating and attention.

6.3 SOCIAL SCIENCE (H)

Social Science (H) is a highly acquired subject, is the second largest subject in the collection, and receives high circulations. However, only a little more than half of newly acquired items circulate within their first year. Newly acquired items have an average publication date of 2010, while the overall collection has an average publication date of 1997. Also, Social Science (H) has the 3rd most ILL requests.

Social Science is ranked 2nd among the top 100 programs, and 4th among the top 40 programs (See 4.2 Students by Subject). Social Science (H) as a subject is home to many topics students focus on in first year writing courses, so it is not surprising to see that this subject has high circulation statistics. However, instead of using more of the newly acquired items, patrons are turning to the items in the stacks which are on average 18 years old¹⁵, or requesting items through ILL. This suggests currency should be emphasized during instruction sessions that highlight the print collection for students. Comparing the usage of Social Science (H) with Opposing Viewpoints might show that students are turning to current online resources more than the physical collection for these topics.

Meanwhile, cultural richness is a core theme at LBCC, and diversity and inclusiveness are often emphasized. Thus, the Library will continue to support and promote these goals on behalf

¹⁵ This is older than some of our students.

of the college by continuing to purchase items, no matter their usage. Emphasizing and pushing these new items might increase their chance of circulating.

6.4 MEDICINE (R)

Medicine (R) while ranking fourth among the top programs, only makes a top five subjects ranking for circulations and ILLs, which makes sense since they are a large population. However, you would think other statistics would reflect these high rankings if they are such a large population that use the collection. As a whole, even though Medicine (R) is not a large subject, and is middle of the road for acquisitions, they are valuable items because they will circulate. The items that are added are about five years old, while the overall collection is about fourteen. Comparing these statistics against ILLs might highlight usage and interest trends.

A thorough review of physical items and subscription health related databases (i.e. CINAHL) usage will help the Library for the move of items to the new health occupations building. Identifying which specific segments within the subject are the highest circulating might identify which items need to be in both places. Of course, since there is general interest in this topic (self-diagnosis, etc.), and no way to differentiate between the purpose of use, these conclusions must be taken with a grain of salt.

6.5 PHILOSOPHY, PSYCHOLOGY & RELIGION (B)

Philosophy, Psychology & Religion (B) makes up about 5% of the physical collection and is a frequently acquired subject. This subject circulates a lot, in fact, newly acquired items will circulate at least once during their first year added. On average, these items were published in 1996; however, newly acquired items were published in 2007. While this subject doesn't make the top 10 from the list of top 100 programs, it does make the top 10 subjects when looking specifically at the top 40 programs. Thus, there are more students this subject is related to in the largest LBCC programs.

While varying by instructor, students taking Religions of the Western World (R102) and Religions of the Eastern World (R103) often are required to make use of religious texts. Interestingly, some instructors hope students will use other libraries to find related texts, and not just the LBCC Library, which might explain the decent number of ILLs in this subject. Buying texts in this subject, doesn't really follow the instructor's wishes. However, working with faculty to review sources used during assignments and completing a citation study would highlight true usage, as to whether or not they are accessing resources available through LBCC.

Another reason this subject is frequently purchased is due to the course General Psychology (PSY201/202), which requires students to research a specific theory. However, reviewing how the psychology subscription databases are used in comparison to the physical, and working with faculty to complete a citation study would highlight which format students are finding using more frequently. Overall, whatever conclusions are made after this additional analysis, this subject is still highly circulating, thus it should be continued to be purchased. However, additional analysis might highlight specific topics to be purchased.

6.6 EDUCATION (L)

Even though Education (L) is not one of the largest subjects, neither is it the most frequently added, nor most circulating, when new items are added in this subject they circulate. In fact, they have the second highest probability of being checked out among newly acquired items, with 1.31 circulations per acquisition. As long as Education (L) is a top program, and the Library supports teaching faculty items should be added. Since we currently purchase titles for various education courses, a syllabus citation study would identify titles used and recommended, which could in turn be used to identify items missing in our collection that should be purchased.

6.7 LANGUAGE AND LITERATURE (P)

Not much needs to be said about Language and Literature (P), since it is a large section that is used frequently, be it in relation to new or old items. However, Language and Literature (P) is under review this year, and will be getting a lot of attention. As the second most ILLED subject, it would be beneficial to review which specific titles are being requested to identify titles to add to the collection. Also, reviewing this section's usage statistics will highlight segments that are used most and least frequently. This will help those assigned those sections when reviewing titles.

6.8 FINE ARTS (N) AND MUSIC (M)

Both Fine Arts (N) and Music (M) were reviewed during the 2014-2015 academic year, thus both would benefit from another analysis in year or two. During the revision process these sections were heavily weeded and updated. This additional analysis would provide insight to the effectiveness of the revision process.

During the review process, a handful of instructors associated with Fine Arts (N) classes provided insight to the types of items they and their students use most frequently (colorful, provide in-depth, easily accessible information, etc.). Thus a review of Fine Arts (N) acquisitions would identify whether or not the newer items truly address their described needs. Also, Fine Arts (N) as a top program suggests a higher number of students with interest in this subject that might be prone to using newer, more colorful items. Seeing as the Fine Arts (N) was the 5th oldest subject in the collection, an influx of newer items might change their rankings, and highlight new buying trends.

Music (M) while not making any top lists, and having a high probability of new acquisitions not circulating, might highlight some interesting trends the review process perpetuates. The previous review process of Music (M) (and Fine Arts) highlighted a number of cataloging errors, which could make them less accessible to patrons. The entry of new items might be the catalyst for change in this subject.

6.9 CONCLUSION

As a whole, this collection analysis identified the need for a more thorough, in-depth analysis of subjects. Incorporating online resources into future analysis would highlight additional trends in usage and purchasing need. Comparing LBCC's collection with similar community college collections is another metric which would benefit this type of assessment. A "big data" report running annually or biannually to capture the previous academic year(s), would make this process easier and provide current information from which to make collection development decisions.

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[Sleep Technology \(BF1068-1073, QP425-7, RA785-6, RC547-9, RC737.5\)](#)

[Pharmacy Technician](#)

[Coding Reimbursement Specialist \(this is a certificate, and it's taught by the MA faculty\)](#)

SEM

Agriculture

Biology (GE, QH, QK-QM, QP, QR, S599-S667, SB, SD, SH, TP248.13-65)

Computer Systems

Chemistry (QD, TP)

Earth Sciences (GE, QE, SD, SH, SK)

Engineering (TA,TC,TE,TF,TG,TJ,TK)

HHP/Athletics (GV201-GV1198, RC1200-1245)

Math (HA, QA except for QA75.5-76.95)

Physical Sciences

Other Departments

Adult Basic Skills

General / Overall Collection Development Resources

- [Materials Selection / Collection Development Policy](#)
- [Choice Reviews](#)
- [Library Journal Reviews](#) (either in print or online)
- [OASIS/Coutts](#)
- [Amazon](#)
- [Gobi/YBP](#)

ASSH

Anthropology (CC, GN, GR, GT, E51-99 , PM101-7356)

Art (N, TR)

Curriculum considerations:

- The Women in Art class
- The Ceramics program
- Anne Magratten's drawing class at Oak Creek (she loves to bring art books over for the students to see -- hardcover is okay. She has a particular interest in showing them images of women who have broken laws.)
- We should also talk with Lauren Visconti about needs related to the anthropology/archaeology courses
- QS262 has a week on queer art

Be sure to buy overview books (of periods, styles, techniques, etc.) -- not just books on specific artists.

Good places to find titles:

- ARLIS/NA reviews: <https://www.arlisna.org/publications/reviews>

- Phaidon: <https://www.phaidon.com/store/art/view-all/>
- New York Times publishes a list of the Best Art Books every year
- It can also be helpful to look at [Oxford UP's archaeology titles](#).

Business (HB-HG, HJ)

- BA 223
- BA 243 Social Media Marketing
 - Students expected to do demographic research
- BA 250 Foundations of Project Management is not typically taught because students take BA 291 Business Process Management instead.
- BA 260 Business Plans
 - Students expected to do research for their business plans
- BA 270? (was 201) Introduction to Business Data Analysis is a newer course taken also by Accounting students. Students learn SQL.
- No outside accreditation currently nor outside tests for which students prepare.
- [Harvard Business Review Reading Lists](#)

Children's Literature

- Standing orders:
 - Caldecott Medal Winners
 - Coretta Scott King Author Award Winner
 - Pura Belpre Author Award Winner
 - Mike Morgan & Larry Romans Children's Literature Award Winner (Stonewall)
 - American Indian Youth Literature Award Picture Book Winner
 - Asian/Pacific American Award for Picture Books Winner
 - National Book Award Young People's Lit Winner

English / Writing

- Standing orders:
 - Pulitzer Prize for Fiction Winner
 - National Book Award Fiction Winner
 - Man Booker Prize Winner
 - National Book Critics Circle Fiction Winner
 - National Book Award Poetry Winner
 - Michael L. Printz Award Winner

Graphic Design / Visual Communication (NC997-NC1003, N7433.8, NC915.C65, NK1520-49, TK5105.888, Z246, Z250)

- Lewis Franklin finds books from this publisher really helpful: <https://standardsmanual.com> -- sometimes best to check before you buy, though, in case he's already bought a copy for his department

- Photoshop, Indesign, and Illustrator are the commonly used pieces of software in this department

History (C-F)

- [Catalog Link](#)
- Standing orders:
 - Pulitzer Prize for History Winner

Journalism (PN4699-5659)

Music (M)

- The most popular music major is music education.
- Ethnomusicology and history of popular music texts tend to be good for both music classes and WR121 classes.
- In recent years, items from ML have been much more likely to circ than items in M or MT.
- Raymond has said not to buy too much to support Music Theory classes.

Scores

The focus of our music performance program is on choral music. But there is a separate choral music library, so we don't have to deal with choir parts or scores. When purchasing classical music scores, keep in mind that pre-1926 works can often be found in [IMSLP](#), which is a resource that music students tend to know about. These tend to be adequate as study scores, though they can be pretty low-quality for performance scores. I tend to concentrate on purchasing scores of post-1926 works, except for song collections, etudes, and other scores meant for performance and practice, rather than study. Raymond has also mentioned an interest in introducing his students to contemporary scores with innovative notation and extended techniques -- for these, probably best to stick to pieces that have performances available on youtube or spotify.

For private lessons on specific instruments, instructors tend to rely on their own personal collections of sheet music, methods, etudes, etc. for students. It's definitely nice to offer some of those in the Library, too, and we should expand our collection in those areas. It would be very difficult for us to offer comprehensive coverage for all of the instruments that we offer lessons for, so probably best to concentrate on more common instruments?

Fake books and song collections tend to circ better than other scores.

- [Edition Peters](#) is probably the best publisher for contemporary scores:
- [American Music Teacher](#) (good reviews for instructional books and methods):
- [Oxford University Press](#) (good for ethnomusicology and music education):

- We have a standing order for the Global Music Series, though, so don't buy those: <http://global.oup.com/us/companion.websites/umbrella/globalmusic/>
- [Schott](#) (scores for contemporary choral music):
- [Boosey and Hawkes](#) (scores for contemporary music):
- [Berklee Press](#) publishes some good titles, especially instructional materials about popular and commercial music. It can also be worth looking at what Berklee has added to their catalog lately: <https://catalog.berklee.edu/>
- It can be good to look at what the [OSU Symphony](#), [Oregon Symphony](#), [Portland Opera](#), [Fear No Music](#), and Eugene Opera are performing, to see if we should purchase study scores for any of those works
- UO maintains a list of [Oregon Composers](#)

Philosophy/Religion (B, BJ, BL-BX)

- Joey Tuminello recommends the "Very Short Introduction" series (on standing order)
- Books in the BQs (Buddhism) are some of the most likely to circulate in the entire library
- [Theological librarianship](#) sometimes has good reviews

Political Science (HX, J)

-

Psychology (BF, RA785, RC)

- We have the APA style manual on standing order (for 4 copies!)

Spanish (PC4001-4977, PQ6001-8929, also throughout the collection)

AMTT

Apprenticeship (TK, QC500-721)

- [Catalog link](#)
- In 2021, training offered in collaboration with Machine Tool, Mechatronics, & Welding.
 - [Limited Energy Technician A \(LEA\)](#)
 - [Limited Energy Technician B \(LEB\)](#)
 - [Limited Maintenance Electrician \(LME\)](#)
 - [Manufacturing Plant Electrician \(MPE or PJ\)](#)
 - Lubrication Technician
 - [Machinist](#)
 - [Millwright](#)
 - [Pipefitter](#)
 - Welding
- Associates degree and one year certificate offered in Electrician Apprenticeship Technologies, Limited Electrician Apprenticeship Technologies, Industrial Mechanics and Maintenance Technology Apprenticeship.

- Resources purchased for welding, machine tool, and mechatronics cover most of what is needed for this program. The unique content would be related to electrician skills and the electricians are pretty much the only outside instructors.
- They do not do residential electrical.
- HVAC apprenticeship is not currently offered. Mechatronics does offer a certificate. When it comes back LEB would necessarily be a part of the program.
- The students in this program typically integrate into LBCC regular classes. The students all have their own jobs and the employers pay for their course materials.
- The National Electrical Code is on standing order.
- Electrical students are studying for the [State Electrical Test through the Bureau of Labor and Industries Building Codes](#). See the list of publications on their exam guidelines.
- Professional Organization: [National Electrical Contractors Association](#)

Automotive Technology (TJ751-805, TL1-484)

- [Catalog link](#)
- Accredited by the [National Institute for Automotive Service Excellence](#)
- They subscribe to their own database and it is not managed by the library.
- Test / certification?
- Accreditation?
- Standards?
- Publishers?
- Reference works?
- Standing orders
- Professional Organization?

Culinary Arts (TX341-953)

- [Catalog link](#)
- Look for international/national/regional/cultural cookbooks for culinary theme days. Other important topics: banquets/buffets, garde manger, meats, cheesemaking, beer/wine & food pairing, preserving, desserts, breads, and pastry.
- Students only study for the OLCC card and food handlers card.
- No outside accreditation but hoping to eventually be American Culinary Federation certified.
- Reference works: Flavor Bible(s), Book of Yields, **Molecular Gastronomy?**, **Noma's guide to fermentation (make sure notifications) Kombucha?**
- Recommended publishers: [Culinary Institute of America publications](#)
- We automatically get the James Beard Foundation Book of the Year. We also get slips for all of the other [James Beard award winners](#).
- We also get slips for the [IACP Cookbook Awards](#)
- Professional Organization: [American Culinary Federation](#)
 - [ACF recommended books](#)

Heavy Equipment / Diesel Technology (TJ751-805, TL1-484)

- [Catalog link](#)
- [Construction and Forestry Equipment Technology](#) is housed in this department
- Test / certification?
- Accreditation?
- Standards?
- Publishers?
- Reference works?
- Standing orders
- Professional Organization?

Machine Tool Technology (T351-385, TJ1125-1345, TS1-2301)

- [Catalog link](#)
- No outside accreditation.
- No particular certification they are studying for.
- Machinery's Handbook is the main reference book needed. It's on standing order.
- Don't need access to a lot of standards, but a few are referenced occasionally.
- Chris Berry teaches blueprint classes, first year CNC classes. Might change the blueprint reading book. Would like print copies of HAAS handbooks (2).
- Ryan Powell teaches manual machine classes and some higher level CNC classes.
- Teryk teaches Materials Science. Students in that class research characteristics of a particular material.
- No particular professional organization.

Mechatronics / Industrial Automation Technology (TJ163.12 and TK7875)

- [Catalog link](#)
- No outside accreditation.
- Students take the [SkillsUSA Mechatronics certification](#) in their second Spring Term.
- Collecting for this department is complicated because they cover a broad range of topics that are scattered throughout the Ts and overlap with other departments (Engineering, Engineering Graphics, Machine Tool, Apprenticeship).
- Main Topics:
 - Industrial safety, **mechanical systems**, drive systems, electrical systems troubleshooting, bearings & lubrication, motors & controls troubleshooting, industrial pneumatic systems, predictive & preventative maintenance, programmable logic controllers, principles of technology (applied physics), industrial hydraulic systems, sensors & actuators, **PLC troubleshooting**, **automated material handling**, pumps & valves, energy & sustainability, process control & instrumentation, customer service for technicians, refrigeration troubleshooting & servicing, EPA technician certification, heating systems, HVAC system controls.

- Electrical theory taught by Apprenticeship and practical stuff by MT, usually Josh Hanson. Josh also teaches the Advanced PLCs and process control classes.
- Apprenticeship students also take Bearings & Lube, Hydraulics Pumps, & Electrical Troubleshooting from MT.
- Dave Mack teaches the applied physics (Principles of Technology), pneumatics, sensors and actuators & automated material handling classes.
- Ken Dickson-Self teaches most of the classes but especially energy and sustainability, customer service, safety, & HVAC.
- Students taking the Industrial Refrigeration focus have to get an [EPA Technician Certification for Refrigerants](#).
- Students have several research assignments:
 - Presentation (or paper) on green technologies/sustainability. Ken is interested in up-to-date resources on this topic.
 - Bearings and Lube (Tribology) - research industrial equipment that have different lubricant needs.
 - Predictive & preventive maintenance - looking up equipment (e.g. boiler/air compressor) & identifying parts to keep on hand, maintenance tasks, etc.
 - Capstone project: try to automate something. Have to research the idea before they try to implement it.
- Their students take several classes from other departments: Solidworks from Machine Tool & CAD from Engineering Graphics, students with Machining, Welding & Computer Networking focus take 3-4 classes from those departments.
- They have their own laptops (installed with SolidWorks) for checkout to students.
- They do not have a particular professional organization.
- **Recommended Publishers:**
 - [American Technical Publishers](#) (ATP)
 - [Goodheart-Willcox](#), especially for refrigeration

[Nondestructive Testing and Evaluation \(TA417.2-5\)](#)

- [Catalog link](#)
- Students study for ASNT tests on the 5 methods
 - Radiography, ultrasonic, liquid penetrant, visual, magnetic particle inspection
 - PTP series, level 1&2
- No outside accreditation
- Standards? ASTM standards are revised every 5 years.
- Publishers none other recommended besides ASNT.
- Research project? In capstone - annotated bibliography. NT100 want to add something. Right now the history of the boroscope.
- Reference works - all of the methods books from ASNT (PTP series)
- Professional Organization: [American Society for Nondestructive Testing](#)

Welding (TS214-228, TT211)

- [Catalog link](#)
- Test / certification? Code weld test AWS code books related to pipes
- No outside accreditation
- Standards?
- **Recommended Publishers:**
 - [AWS](#)
 - [IPT](#) (handbooks use in both welding and pipe trades, prefer ebooks)
- Research project?
- Reference works?
- Standing orders
- Professional Organization: [American Welding Society](#)

Health Occupations / Sciences

- [Doody's Core Titles](#) - Ask Jane or Richenda, login info.
- Notes: for almost all programs, but especially nursing, avoid adding materials not published within the last 5 years. Check carefully to make sure the latest ed. is being purchased.
- The school no longer has an EMS/EMT program, so avoid purchasing for that. We no longer have a pharmacy technician program or Veterinary Technician.
- Standing orders we will no longer be getting: AHFS drug guide

Dental Assistant Program (RK, QM535)

- [Catalog link](#)
- [Catalog link](#) for Pre-professional Dental Hygiene Preparation
- 3rd party accreditation from the [Commission on Dental Accreditation](#) every 7 years (last visit was May 2018). They have a [document with accreditation standards](#) for learning resources and student services for dental assisting.
- Requirements differ by state for each level of dental assisting, but to be a Certified Dental Assistant, they take the CDA exam, which has three component exams. Our students take [three exams](#) from Dental Assisting National Board, Infection Control (ICE), Radiation Health & Safety (RHS), and General Chairside (GC).
- [DANB Exam Reference Materials](#)
- Professional Organization: [American Dental Assistants Association](#)
- As of Fall 2019, they don't use a specialized subscription video/study service

Surgical Technician Program (RD, QM, QR, R723-6)

- [Catalog link](#)
- Consider electronic formats, because these students are not on campus often. Program is mostly online with students coming in once a week for lab

- 3rd party accreditation from [CAAHEP](#) every ? years (last visit was April 2018, they didn't stop by the library).
- Students take the [CST](#) (Certified Surgical Technician) exam given by the NBSTSA. It must be the surgical technician test, not surgical assisting! Practice test at <https://store.lxr.com/dept.aspx?id=68>. Students have to pay to take the practice test.
- [CST Exam Reference List](#)
- Professional Organization: [Association of Surgical Technologists](#)
- Their preferred streaming video service is JOMI (specialized subscription video/study service)
- Prefer ebooks
- Currently Norma really likes Surgical Instrumentation by Nancymarie Phillips, so I'm ordering a second copy.

Nursing (GN484.38, QM, RG, RS, RT, QP)

- [Catalog link](#)
- Students take the [NCLEX-RN](#) exam given by NCSBN. It was last updated in 2014/2015 to make it harder. Sheryl recommends not having anything older than that, but we don't need to update it every year. Students typically take it in the spring. Saunders, Davis, and Kaplan are some of the study guides commonly used. The NCLEX may possibly be overhauled in the next few years. Our students do not take the NCLEX-PN, however some instructors advise first year students to look at the PN books as a way to practice test questions that reflect their current learning level.
- 3rd party accreditation from
- [Topics breakdown](#): Thinking Like a Nurse, Evidence-Based Practice, Communication, Documentation, culture, pain management, infection control, nutrition, rest/sleep/mobility, fluid and electrolytes and fluid management, safety, elimination, oxygenation, hygiene and skin, directing care, mental health, wound care, perioperative, pulmonary/respiratory (adult and peds), hypertension, metabolic-diabetes and endocrine, GI (adult/peds), genitourinary and reproductive, musculoskeletal, hospitalized child, immunology/HIV, cardiology, neurology (adult/peds), genetics, oncology, OB (including high risk), newborn, substance abuse and addiction, scope of practice, hematology, end of life, peds (more on injury prevention, abuse, end of life), community/discharge, emergency department and disaster, Shock/multiple organ dysfunction syndrome, renal, organ transplant post care.
- Their preferred streaming video service is ATI, which is purchased by the students
- Professional Organization: [American Nurses Association](#)

Nursing Assistant

- [Catalog link](#). This is the only Healthcare program that is not a certificate or degree.
- [Oregon State Board of Nursing CMA and CNA Certification Information](#)

- Their specialized streaming service is a Modular system through IPCed/Relias. I'd need to get the correct link to find out more.

Diagnostic Imaging (RC78.7)

- [Catalog link](#)
- Consider electronic formats, because these students are not on campus after the first year.
- Our students take the American Registry of Radiologic Technologists (ARRT) [Radiography](#) exam. They prepare to take the test the last 6 months of their program, usually with online tests.
- Areas for which the content doesn't change, older books ok: Physics
- Modalities (specialties) discussed in the program include: Ultrasound/Sonography, MRI, CT, Mammography, PET/Nuclear Medicine, Cath lab/Interventional Lab, Bone Densitometry. Topics of interest also include physics and biology.
- Professional Organization: [American Society of Radiologic Technologists \(ASRT\)](#)
- [ASRT Radiography Exam Review](#)
- As of Fall 2019, they don't use a specialized subscription video/study service

Medical Assistant (HG9371-HG9399, QM, R118, R123, R728.8, RA1-415, RC683.5.E5, RS)

- [Catalog link](#)
- [Oregon State Board of Nursing CMA and CNA Certification Information](#)
- Students prepare for the [American Association of Medical Assistants Exam \(CMA AAMA\)](#)
- CPT Manual, ICD 10 CM Manual, HCPCS Level II. The first two are the most important, but preferably we want all three on hand. It doesn't matter which publisher they are from, however, the books are only good for two years. Their year of publication/year listed on cover, and one additional year. The best time to buy is October for the upcoming year. Also used by the coding students.
- As of Fall 2019, they don't use a specialized subscription video/study service. They use videos from around the web

Occupational Therapy Assistant (BF712-724, QM, RM695-950)

- [Catalog link](#)
- Check with OTA before discarding old items. According to Beth M., sometimes older textbooks retain exercises and helpful diagrams and descriptions that are cut out of newer editions, but the information is still valid.
- Accredited every 7 years (if they qualify for the maximum time) by [ACOTE](#) (Accreditation Council for Occupational Therapy Education). Last site visit was Oct. 2018.
- Professional exam students prepare for is the [NBCOT](#) (National Board for Certification in Occupational Therapy). The NBCOT questions are built from a [set list of textbooks](#), many of which are used by the program.

- Professional organization is [AOTA](#) (American Occupational Therapy Association), and students are encouraged to be involved with [OTAO](#) (Occupational Therapy Association of Oregon).
- Their preferred streaming video service is ICE
- As of 10/29/19, hold off on purchasing Practice Guidelines, because there isn't a good way to buy them electronically.
- Faculty also would prefer to buy more ebooks.
- As of Fall 2019 use streaming service [ICE](#), which has videos of OTs working with clients. Mashelle showed it to me and it is an entire library of very specific videos. Many are actual sessions with clients.

Phlebotomy

- [Catalog link](#)
- Recommended certification test through [ASCP](#) for the PBT
- As of Fall 2019, they don't use a specialized subscription video/study service

Sleep Technology (BF1068-1073, QP425-7, RA785-6, RC547-9, RC737.5)

- [Catalog link](#)
- The professional educational organization is the [AAST](#). The professional organization is the [AASM](#). The [BRPT](#) is the certification board and administers the [RPSGT](#) examination.
- Prefer ebooks
- As of Fall 2019, they don't use a specialized subscription video/study service

Pharmacy Technician

- ~~[Catalog link](#)~~
- ~~Our students prepare to take the Pharmacy Technician Certification Exam ([PTCE](#)) (NOT the ExCEPT) which is administered by the [PTCB](#). The PTCE was last updated in [2013](#) (check before ordering new pharm test books).~~

Coding Reimbursement Specialist (this is a certificate, and it's taught by the MA faculty)

- [Catalog link](#)
- CPT Professional Manual, ICD 10 CM Manual, HCPCS Level II. The first two are the most important, but preferably we want all three on hand. It doesn't matter which publisher they are from, however, the books are only good for two years. Their year of publication/year listed on cover, and one additional year. The best time to buy is October for the upcoming year. Also used by the CMA students.
- As of Fall 2019, they don't use a specialized subscription video/study service

SEM

Agriculture

Biology (GE, QH, QK-QM, QP, QR, S599-S667, SB, SD, SH, TP248.13-65)

Computer Systems (QA75.5-76.95)

Chemistry (QD, TP)

- [Catalog link](#)
- Professional Organizations:
 - [American Chemical Society](#)
 - [American Institute of Chemical Engineers \(AIChE\)](#)

Earth Sciences (GE, QE, SD, SH, SK)

- These classes are usually listed as General Science

Engineering (TA,TC,TE,TF,TG,TJ,TK)

- [Catalog link](#)
- Selected Professional Organizations:
 - [American Society of Civil Engineers \(ASCE\)](#)
 - [American Society of Mechanical Engineers \(ASME\)](#)
 - [ASM International \(Materials/Metals\)](#)
 - [Institute of Electrical and Electronics Engineers \(IEEE\)](#)

HHP/Athletics (GV201-GV1198, RC1200-1245)

Math (HA, QA except for QA75.5-76.95)

Physical Sciences

- Includes both Chemistry and Physics

Other Departments

Adult Basic Skills (LB3060)

- Includes three programs: GED, GED en español, & English Language Acquisition (ELA)
- Readers & Literacy Collections

Family Resources and Education Center

- Includes Parenting Education, Family Connections, the Early Learning Hub, & Pollywog. All programs except parenting education are grant funded.
- Oversee a variety of parenting programs for age groups ranging from birth through high school, in English and Spanish, and in Linn, Benton, and Lincoln counties.

- Have classes all over the community (especially at schools & community centers), but when they are on LBCC campuses they mainly teach in Luckiamute and the Benton Center.
- They have their own “library” of materials that they check out and track using a spreadsheet. It is comprised mainly of curriculum sets.

| Current databases | Renewal month | Official pricing | Official pricing, including cost-sharing | Cost estimate (if we don't have official quote) | Perpetual access | Decision | Decision enacted | relevant to curriculum | unique (i.e., not duplicative of free or current library resources) | good value for what it provides | dept. willing to pitch in (if a subject-specific database) | important to particular dept/class | discovery process is usable and suited to the database's contents | search returns relevant results | useful functions (e.g., email, permalinks, built in citations) | technically feasible (e.g., authentication, hardware/software compatibility, hosting) | appropriate licensing (e.g., instructors can easily embed content in LMS; ideally library owns rather than license content) | COUNTER 5 stats and SUSHI? | good support/documentation | appropriate purchasing model (e.g., rent, pay per view, own, etc.) | appropriate date coverage (e.g., current) | Requests during calendar year 2021 | Price/requests | Notes |
|-------------------|---------------|------------------|--|---|------------------|----------|------------------|------------------------|---|---------------------------------|--|------------------------------------|---|---------------------------------|--|---|---|----------------------------|----------------------------|--|---|------------------------------------|----------------|-------|
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Weeding

1. [Print a Shelf List / Weeding report](#) for your assigned section or request it from Richenda or Scott.
2. Contact discipline faculty (Richenda can help with this) to invite them to participate in the decision-making. Review college curriculum related to the subject area.
3. Look through the report, highlighting any items to be pulled for review. Look at the create date and *do not* pull items that were purchased within the past three years. In general, you may want to review items with:
 - pub. date 15 years or older (5 years or older for engineering, medicine, etc.) OR
 - less than 3 circulations / In-house uses OR
 - No recent circulations (perhaps within 5 years)
*note that circ info only goes back to 2012
4. Give your highlighted sheets to the person assigned to inventory your section. Alternatively, you could inventory/pull from the section yourself. Lara would train you on this process.
5. Review the items on your cart. Each book should have a [pink slip](#) with helpful information. You have several choices for reviewed items:
 - Discard
 - Place these items on the Review shelves, along with any helpful notes for Richenda on the pink slip. Helpful notes could include information about subject replacements in your wishlist, library already owns a newer edition or another copy, we have better items on the same subject, etc.
 - Keep
 - Place these items on a shelving cart, after you have removed the pink slip.
 - Replace
 - Place these items on the Replacements shelf and add the replacement item to Fran's Amazon wishlist, with the following note: Replacement. Fund: Weeding. *Your name*. Alternatively, you could opt to leave the item in the stacks until the replacement arrives. In that case, please note to replace the copy in the stacks.
 - Change or Mend
 - Sometimes we change the item from library use only to circulating or we enhance the cataloging to include the table of contents, better subject headings, etc. Make clear instructions about the requested changes and add these items to the Mending shelf. Also, sometimes an item to be kept needs to be mended or have a new spine label. Please be sure to follow the [Mending](#) shelf procedures.
 - Not sure
 - Save these items and chat with Richenda about them.
6. Do an "ugly books" walk
 - Pull any items that look overly worn, dated, or generally icky and make decisions about these items.
7. Select new items to purchase and add them to your weeding wishlist on Amazon. Refer to [Collection Development Resources / Considerations](#).
 - Replace older titles that have high circs with updated editions or newer items on the same topic.

- Look for replacements for subjects that were heavily weeded.
- Look for gaps in the collection, especially based on program curriculum.

Please note: The replacements shelf is for same edition or updated edition replacements of the same title. If you will be replacing an item with a completely different item on the same topic (sometimes called a "subject replacement"), please do not place the item that will be weeded on the replacements shelf. Either place this item on the review shelves with a note that there is a subject replacement on order or leave the item in the stacks and leave a detailed note in Amazon on which book to pull when the replacement item arrives.

Some definitions:

- Create date (when it was added to our system, which could be as an on-order record)
- Active date (when patrons could first start using the item)
- Last circ date (the date of the most recent checkout or renewal)
- In-house uses must be recorded by a staff person and may not include all in-library uses
- Available? column = Item Status

Related documents:

- [Weeding schedule](#)
- [CREW weeding manual](#)

Requests for Streaming Videos (including uploads of Library DVDs)

General procedures for librarians

When an instructor asks for streaming access to a video (or for one of our DVDs to be uploaded into Panapto):

- Check to see if we already have the video in FOD, AVON, Swank, Docuseek, or [this spreadsheet of temporary licenses](#). Also search to see if the video is streaming free online (from the copyright holder - don't refer to a clearly pirated link). If so, reply with the link.
- Refer to the appropriate [subject librarian](#). They will check to see if we can purchase a streaming license to the video from the publisher or distributor, *even if we own the DVD*.

-
- Subject librarians:
 - Ask the faculty if the video is required or optional. We may purchase reasonably-priced perpetual access for optional videos, but not temporary streaming licenses.
 - Email SBrennan@alexanderstreet.com, custserv@films.com, support@docuseek2.com, and hging@swankmp.com to inquire if we can license it. If they do not have it in their catalog, they will often talk with the copyright holder to see if they can add titles they do not have (can take several weeks).
 - Check [Kanopy](#) using the credentials linnbenton / linnbenton129
 - Search online for other streaming license options.
 - If it is not a reasonable price, tell the instructor that the library cannot afford access to the title at this time and offer to help them find alternative titles. Typically, we also share the price with them (sample email below).
 - If streaming access is not for sale to libraries:
 - We may already have a DVD in the collection. In this case, the in-library circ person may be asked to check the DVD out to Ken Long and deliver it to his office with the instructor's name on a sticky note.
 - If neither the library or the instructor owns the DVD, email Fran to see if we can purchase one- include the name of the film, any purchasing info you may have found, and the instructor.
 - Once the new DVD has arrived, Fran will give it to Ken Long along with the name of the instructor. The DVD will be cataloged after Ken returns it.
 - Email the instructor cc:Ken Long, to let them know that:
 - you were not able to purchase a streaming license
 - they can request permission from the copyright holder to stream the whole film from Panapto through their division admin
 - they can use fair use if they only need to use a small portion and/or don't have time to get permissions. They should contact Ken and let him know

what is pedagogically necessary for their class (part of their fair use decision). Once they've communicated with Ken and the copyright permission has been requested, he will upload the video within a few days, provide them with a Panapto link, and recommend they protect this link behind their LMS login.

- If they want to know more about fair use, refer them to the [Copyright Guide](#) and/or a FT librarian (**sample email below**).
- If streaming access is a reasonable price (perhaps \$300 or less for a temporary license):
 - Choose a perpetual license or 3 year license if there is a reasonable expectation that the instructor will continue to teach at LBCC. Otherwise, a 1 year license may be the best option.
 - Only consider licensing with Kanopy as a *last resort*. They do not provide compatible usage data and engage in some bad business practices.
 - Ask Fran to purchase and make sure to tell her the name of the instructor who requested it.
 - Fran should send the subject librarian access information as soon as it becomes available.
 - Fran will upload the license PDF to [this folder](#) and add the title to [this spreadsheet of video licenses](#).
 - For temporary licenses:
 - Subject librarian will create a scheduled email for when the license is about to expire to remind themselves to check in with the faculty member.
 - Subject librarian will email the instructor to let them know the basics of the license we are purchasing. Typically, we tell them the duration, the price, and how students will access it. Include a link to the streaming video (with the EZProxy prefix if necessary).
 - Temporary licenses do not get added to the library catalog.
 - For perpetual licenses:
 - If we acquired a video file, rather than a streaming link, upload it to AVON. This will allow users to sign in to the video using their regular EZProxy credentials.
 - Make sure the file is 4 GB or less
 - Go to <https://adminportal.alexanderstreet.com>
 - Login:
 - Ask Richenda for login.
 - Click Menu > Uploads
 - Click "Upload My Content" button
 - Fill in the form. Uploading the video file will likely take a long time (like an hour or more).
 - Fill in all the required fields -- you may be able to find some of this information from Worldcat

- Also, find a DVD cover or movie poster from Google Images. Download it and upload it into the cover art field. It needs to be a JPG
- Wait for 48 hours, then go to [AVON](#) and make sure that it displays and searches as you expect
 - For RUSH access to streaming videos, forward video file access information to Ken Long and ask him to upload it to Panapto asap.
 - If we have been able to upload the video file in Panapto or a proxy-enabled database, we do catalog it. Send as much information as you have (and in particular, the title and URL) to the catalogers.

Sample emails:

Library DVD going into Panapto

I was not able to find an option to purchase a streaming license for this video. If a digital license cannot be procured, your next recourse would be requesting permission or relying on fair use. Under fair use, you would use the minimal amount necessary for your teaching goal (factor 3 of a fair use analysis). For example, instead of digitizing a whole film, you might show a few clips. Faculty are responsible for copyright compliance. Librarians are not attorneys--we can provide you with copyright information, but not legal advice. [This guide](#) has more information about copyright and fair use. The Library does have a DVD that you can request be sent to Ken (longk@linnbenton.edu). Let him know which portion(s) of the video you would like uploaded to Panapto. When using fair use you also have the option to show the portion of the video over Zoom or create the clip and post in Moodle yourself (ensuring the clip is password protected and not posted somewhere publicly like Youtube strengthens your fair use argument).

If you would like to stream a more substantial portion of the film, you should seek permission from the copyright holder. Your division admin will request copyright permission to upload this content into Panapto. After we have requested permission, Ken will upload it and then send you a link to the video. Ken can also answer any questions that you have about Panapto. This process usually takes several days. It is recommended that you provide the link to your students within your LMS course shell, so that it is password protected.

Library cannot provide access

To license streaming access to that video, the library would have to pay \$750 per year. Unfortunately, our budget cannot sustain that expense. Perhaps you could check with your Dean to see if cost-sharing would be possible. Would you like me to see if I can find other streaming videos that would meet your needs?

Library will purchase a temporary license

The library will be able to purchase a 1 year license to stream this video through our [Films on Demand database](#). You will get an email from Fran Beck or me when the order is complete. Since we will need to renew this license yearly for \$175, I would appreciate it if you would tell us if you ever decide to stop using it. Also, once we are back to face to face instruction, if you are showing it during class, it would be much less costly to use the [DVD version](#).

Netflix original content

Unfortunately, Netflix does not have institutional licenses for their original content nor do they do not sell DVDs. They do provide permission for educational screenings of many of their documentaries. Please see the information that they have provided here:

<https://help.netflix.com/en/node/57695>

You would need to stream the video during class. If your class is remote, you would need to use screen sharing to screen the film for the students.

LBCC Library Advisory Committee Membership (2022)

- Lauren Visconti, Anthropology faculty at LBCC
- Kristina Thompson, Nursing faculty at LBCC
- LBCC English faculty rep (Ramycia, Chris, Karelia, and Kathy have all volunteered)
- Cameron Wright, SLC student representative - cameron.wright.1496@mail.linnbenton.edu
- Head of Library Experience and Access Department at Oregon State University Libraries - Beth.Filar-Williams@oregonstate.edu
- Eric Ikenouye, Library Director at Albany Public Library - eric.ikenouye@cityofalbany.net
- Mark Peterson, Faculty Librarian at Mt. Hood Community College - mark.peterson@mhcc.edu

Goal:

- I. Increase WR121 & Comm111 participation with Library information literacy program.

2022-23 Metrics

- Establish baseline for participation in F2F, virtual, and asynchronous instruction with LBCC Librarian
- Establish baseline for usage of Information Literacy module in Moodle for WR 121 classes with goal of reaching 100% participation in future years

2023 - 2024

- Using data from instruction records, librarians will increase participation in the instruction program from the baseline by at least 1 new faculty a year.
- Targeted marketing will increase WR 121 class use of the Moodle Information Literacy module by at least 1 faculty for that year.

Goal:

- II. Improve our assessment of student information literacy skills

Metrics:

2022-23:

- Establish baseline for student assessment by sending an end of term survey to students who have participated in Library instruction sessions (either F2F or virtual) and/or who have participated in a research consultation to determine information literacy skills/dispositions they have learned or improved.

2023-24

- At least 3% more participating students will report that they learned or improved an information literacy skill/disposition.

Goal:

III. Create and maintain an online clearinghouse of information literacy / library instruction materials consisting of online guides and video tutorials

Metrics:

2022-23:

- Establish a baseline for usage by using statistics from the Library CMS

2023-24

- Usage of resources overall will increase by at least 3%.

Activities

| Every term | Annually | Strategic (undetermined date) |
|---|---|-------------------------------|
| <p>Send general email to LBCC faculty inviting them to participate in Library instruction services & to use the materials in the clearinghouse</p> <p>Send individual emails targeted to individual WR and COMM faculty inviting them to participate in Library instruction services</p> <p>Communicate with students who participated in library instruction sessions and research consultations inviting them to participate in a</p> | <p>Meet with the Writing department and Communications department to review information literacy and research expectations for students in WR 121 and COMM 111</p> <p>Measure usage of online information literacy instructional materials.</p> <p>Assess currency and relevance of existing online instructional materials; create new materials when necessary.</p> | |

survey.

Review survey results and make
needed adjustments to instruction.

| Name / Title | Schedule | Major Regular Duties | Training / Specialization / Other Interests | Specific Technical Skills | Contact information | Languages spoken |
|---|---|---|--|---|----------------------------------|---|
| Fran Beck Library Specialist | M, W, Th 9 to 5:30 Tuesday work remotely Mon. busy 1 pm to 2:30 Wednesday & Thursday Busy from 12:30 to 2 | Evening circulation desk service Purchases Librarian's selections and enters encumbrances in ILS Work-study supervisor Interlibrary Loans | Front desk professionals training Banner training interlibrary loan training | Experience using Microsoft Word, Excel, Powerpoint, and Publisher Banner access - some finance | x4642 beckf@linnbenton.edu | |
| Cheryl Carlson Library Specialist | M-F: 7:30-4:00; Work from home Mondays; Lunch 2-3pm | Circulation Desk service (daytime), Reserves, Library's bills, student bills, Purchaser for library, Work- Study supervisor | Library history at LBCC (last 19 years), Nose like a blood hound, Know many of the faculty, Detail oriented, Banner training | Banner access | X4678 carlsoc@linnbenton. edu | |
| Scott Gallagher-Starr Systems and Discovery Librarian | | *Library systems manager | *MLIS *Computer science; web technologies *Linguistics *Liaison to SEM division, Religion/Philosophy, Geography | Evergreen admin, EDS admin, Electronic resources admin Banner access | x4660 gallags@linnbenton.edu | English German (beginner) Latin (beginner) Classical Greek (beginner) |
| Richenda Hawkins Department Chair Instructional Services / Reference Librarian | M-F: 10-6ish May work at home Monday & Friday mornings | *Reference Desk coordination *Information Literacy Instruction *Collection Management (Acquisition/ discard of resources) *Library facility oversight *Navigating college processes | *MLIS *TESOL certificate *Native American Studies / Ethnic Studies *Adult Literacy *Services to Spanish speakers *Liaison to AMTT Division, Engineering, English/Writing, History/Humanities, Anthropology, Business, Art, Spanish, ABS & the Benton Center. | *Can help with library databases, SSO, Webrunner, Moodle, Google Suite, GoPrint, MS Office, including password resets Excel - Intermediate Banner access | x4645, hawkinr@linnbenton.edu | *Spanish *Portuguese (beginner/intermediate) |
| Bryan Miyagishima Reference / Instruction Services Librarian | M-F: 8-4:30ish May work at home Thursday & Friday | *Information Literacy Instruction *Library skills pedagogy *Instructional design for library resources *Electronic resources backup *Reference desk service *Navigating college processes *Can consult and assist with instructional materials for library resources | *MLIS & M.Ed. *Background in Education and Writing instruction *Liaison to Education/CFS, HHP, Comm, Criminal Justice, Sociology, Political Science, Psychology, and Biology | * Can help with library databases, SSO, Webrunner, Moodle, Google Suite, GoPrint, MS Office, including password resets Excel - beginner Banner access | x4646 miyagib@linnbenton.edu | |
| Shay Newman Computer Specialist | M-Th: 7:30-4 F: 7-3:30 | Student Help Desk Supervisor, Computer Support Lib/LC, Computer Lab Scheduler, Library Duties | | * Microsoft Operating Systems * Word/Powerpoint/Excel * Basic Access * Web browsers * Hardware * Scanners * Deskjet/Laser/3D Printers * SSO, Moodle, Webrunner * GoPrint * Network/Switches * Basic HTML * Google drive/Apps * Computer Troubleshooting * College supported Software Troubleshooting * Banner access | X4698 newmans@linnbenton.edu | |

| Name / Title | Schedule | Major Regular Duties | Training / Specialization / Other Interests | Specific Technical Skills | Contact information | Languages spoken |
|--|--|--|--|---|--|---------------------------|
| Patrick Acree Student Help Desk IA | Tu 12:30-4:30 W-Th 12:30-6 F 12-5 | Student Helpdesk service, email, passwords of all sorts, duties as required | *ITIL Certified | * Can help with SSO, Webrunner, Moodle, GoPrint, Google Suite, MS Office, including password resets * Banner access | acreep@linnbenton.edu | |
| Maria Beteran Part-time Librarian | Thursday: 10am-3pm; Friday 9am-2pm | Reference Desk Service | *MLIS *Background in librarianship and special collections, services to Spanish speakers; *Interests: art, history, photography | * Can help with library databases, Google Suite, MS Office, Adobe Photoshop (beginner), computer troubleshooting | beteram@linnbenton.edu | Spanish |
| Nicholas Burgess Student Help Desk IA | Thurs: 8am-2pm Fri: 8am-2pm | Student Helpdesk service, application logins & password resets, duties as required | MS in Management and IS BS in Business/Finance/Ent (WOU for both) ASOT (CCC) | *MS Office 365 *Python Lots of experience relating to hardware and specialized software (experience with a lot of different things, willing to learn anything I don't already know) | burgesn@linnbenton.edu | Hungarian, some German |
| John Dougherty Student Help Desk IA | M-Th: 7:30-12:30 | Student Helpdesk service, application logins & password resets | | * Can help with SSO, Webrunner, Moodle, GoPrint, Google Suite, MS Office, including password resets * Banner access | doughej@linnbenton.edu | |
| Jessica Genco, Library Aide | Thursday 10am-6pm (11-12, 2-3, 5-6 off desk) Friday 8am-4pm (8am-9am, 11-1 off desk) | Circulation Desk Service | AS with an emphasis in Anthropology (LBCC), former Academic Tutor for Anthropology and Womens' Studies at LBCC | Evergreen ILS, Google Workspace, Microsoft Office | gencoj@linnbenton.edu | |
| Mark Grimes Student Help Desk IA | | Student Helpdesk service | | * Can help with SSO, Webrunner, Moodle, GoPrint, Google Suite, MS Office, including password resets * Banner access | grimesm@linnbenton.edu | |
| Douglas Hambley Part-time Librarian | | Reference Desk service Student Help Desk Back-up | *MLIS *Background in Medical librarianship *Liaison to the Healthcare division | * Can help with SSO, Webrunner, Moodle, GoPrint, Google Suite, MS Office, including password resets * Banner access | hambled@linnbenton.edu | |
| Forrest Johnson Part-time Librarian | Mon 9am-1pm (off desk 12-1pm) Tues 9am-11am Thurs 9am-2pm (off desk 1-2 pm) Fri 10am-12pm | Reference Desk service Student Help Desk Back-up | *MLIS *Graphic design *English Lit and Writing *OER *Copyright *Print on demand services *Makerspaces *Comics *Skateboarding | * Can help with SSO, Webrunner, Moodle, GoPrint, Google Suite, MS Office, including password resets * Banner access | johnsof@linnbenton.edu | |
| Diana Kepner Library Aide | Monday 10am-4pm (12pm-2pm off desk) Tuesday 12pm-5pm (2-3 off desk) Wednesday 1pm-5pm (2-3 off desk) | Circulation Desk Service | BS in Technical Writing, OSU | | kepnerd@linnbenton.edu | |
| Nancy Lasater Library Specialist | 8-12 Monday-Wednesday | Circulation Desk service, shelving, withdrawing items from the collection | | | nancy.lasater.5795@mail.linnbenton.edu | |

| Name / Title | Schedule | Major Regular Duties | Training / Specialization / Other Interests | Specific Technical Skills | Contact information | Languages spoken |
|--|--|--|---|--|---|---|
| Paul Naxer Library Reference Assistant | Sat 11-3 Mon 1-5 Wed 12-4 Thur 9-2 | Reference Desk | *MLIS *Board games *Cycling, hiking | eBooks, eReaders All paper printers MS Office, MS Windows General Tech troubleshooting, reference interviews, Apple Products | naxerp@linnbenton.edu pnaxer@gmail.com 216-338-2995 | |
| Mark Price Student Help Desk IA | M 8:30-12; W-Th 6-9; F 8:30-12 | Student Helpdesk service, application logins & password resets | | * HTML, CSS, PHP * Microsoft Operating Systems * Word/Powerpoint/Excel * Basic Access * Web browsers * Basic hardware questions * Scanners * Basic printer troubleshooting * SSO, Moodle, Webrunner * GoPrint * Google drive/Apps * Computer Troubleshooting * Banner access | pricem@linnbenton.edu | |
| Euarda (Duda) Reolon Student Help Desk IA | Mon: 11am-4pm Wed: 9:15am-11:45pm Fri: 11am-4pm | Student Helpdesk service, application logins & password resets, duties as required | Engineering Student | *MS Office 365 *Experience with teaching basic computer skills and digital literacy, and with customer service *Excited to learn new abilities and develop skills | reolond@linnbenton.edu | Portuguese, Spanish, and some German |
| Lara Van Hoff Library Specialist | M-Th: 10:30-5ish In building Monday & Tuesday. Work from home Wednesday & Thursday | Copy cataloging library items for all branches, including streaming videos & ebooks. Physically processing items. Responsible for missing searches, withdrawing items, collaborating on book displays, & mending books & dvds. Back up for Interlibrary loan specialist and reserves collection cataloging. | Photography, Costume design, and jewelry design. BA in Apparel Design & Merchandising Management | MS office, ten key, touch typing. Work primarily in ILS (evergreen) | vanhoff@linnbenton.edu X4651 | |

Linn-Benton Community College
Institutional Learning Outcomes*

The American Association of Colleges and Universities states, and LBCC concurs, that “beginning in school, and continuing at successively higher levels across their college studies, students should prepare for [the] twenty-first-century.” Students who complete a program of study at LBCC will have achieved our institutional outcomes which are listed below:

1) Intellectual and Practical Skills demonstrated through:

- Inquiry and analysis
- Critical and creative thinking
- Written and oral communication
- Quantitative literacy
- Information literacy
- Teamwork and problem solving

2) Personal and Social Responsibility demonstrated through:

- Civic knowledge and engagement—local and global
- Intercultural knowledge and competence
- Ethical reasoning and action
- Foundations and skills for lifelong learning

3) Integrative and Applied Learning demonstrated through:

- Application of knowledge, skills, and responsibilities
- Synthesis and advanced accomplishment across general and specialized studies within
our programs

**Adapted from American Association of Colleges and Universities – Essential Learning Outcomes*

| | | | | | | |
|--|--|--|------------------------------|------------------|---|----------|
| Division / Area | | | | | | |
| Arts, Social Science, & Humanities | Shared | | ASSH Details | | | |
| Advanced Manufacturing and Transportation Technology | Richenda | | BUSINESS MGMT | Richenda | | |
| Academic Foundations | Richenda | | COMMUNICATION | Bryan | | |
| Healthcare | Douglas (w/ Bryan) | | CRIMINAL JUSTICE | Bryan | | |
| Science, Engineering, and Mathematics | Scott (except Biology = Bryan & Engineering = Richenda) | | EDUCATION/ CHILD & FAMILY | Bryan | | |
| Benton Center | Richenda | | ENGLISH/WRITING | Richenda | | |
| Academic Progression and LnC | Department Chair | | JOURNALISM | Richenda | | |
| | | | PERFORMING ARTS | Douglas | | |
| | | | VISUAL ARTS | Richenda | | |
| | | | FOREIGN LANGUAGE | Richenda | | |
| | | | SOCIAL SCIENCE | Bryan & Richenda | Social Science Details (mainly for collection development) | |
| | | | | | Sociology | Bryan |
| | | | | | Political Science | Bryan |
| | | | | | History | Richenda |
| | | | | | Humanities | Richenda |
| | | | | | Psychology | Bryan |
| | | | | | Religion | Scott |
| | | | | | Philosophy | Scott |
| | | | | | Anthropology | Richenda |
| | | | | | Geography | Scott |

Richenda's Liaison Duties

- Meet with the following departments at least once per year. Some [talking points](#).
 - Regular communication (emails about once per term) reminding them of our services.
 - For each of the following areas, provide:
 - Information literacy instruction
 - Collection development
 - Reference services, especially research appointments & questions from faculty
 - Libguides, tutorials, screencasts, handouts, etc.
-

- Adult Basic Skills - Dept. meeting presentation 9/16/21

ASSH -

- Writing / English - Dept. meeting 11/9/21, Met with chair 1/16/19
- Journalism - Met 11/3/21
- Foreign Language - Met with Margarita 4/23/19
- Business** - New dept for me Fall 2021. Meeting request sent. Will attend next dept meeting.
- Social Science
 - Anthropology - Met 12/7/21, 3/20/19
 - History, Humanities, Geography - Met 10/27/21

AMTT - Chairs meeting 12/12/19

- Culinary Arts - Met 10/15/21, 5/11/21
- Machine Tool - Met 4/12/21
- Mechatronics - Met 3/17/21
- Non-Destructive Testing - Met 10/26/21, 4/21/21
- Welding - Met 8/12/21, 4/12/21
- Apprenticeship / CWE - 3/15/21
- Automotive Technology** - Meeting request sent
- Heavy Equipment / Diesel** - Meeting request sent

SEM - Chairs meeting 11/12/19

- Physical Sciences - Met 11/12/21
- Agriculture - Met 3/16/18
- Biology - Met with chair 4/9/19
- Engineering - Met with chair 4/12/18
- Math - Met with Shannon (LC/Library liaison) 12/9/19
- Health and Human Performance (PE-Faculty) - Met 10/29/21

Benton Center - Met with Jeff Davis 5/12/21, Met with front desk staff 10/6/20

- Learning & Career Center - Met 10/14/21

☐ Parenting Ed - Met 12/2/21



FACILITIES COMPREHENSIVE / MASTER PLAN

08.09.2016

Linn-Benton **FFA**
COMMUNITY COLLEGE Architecture
+Interiors

FFA
Architecture
+Interiors

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PARTICIPANTS

LINN-BENTON COMMUNITY COLLEGE FACILITIES MASTER PLAN ADVISORY STAFF

| | |
|-------------------|---|
| David Becker | Dean, Business Applied Technology & Industry |
| Ann Buchele | Vice President, Academic Affairs and Workforce Development |
| Linda Carroll | Dean, Healthcare |
| Bruce Clemetsen | Vice President, Student Affairs |
| Jeff Davis | Regional Director, Benton County |
| Tracy Dusseau | Center for Accessibility Resources |
| Andrew Feldman | Dean, Science, Engineering & Math |
| Jan Fraser-Hevlin | Career & Counseling Services |
| Dave Henderson | Vice President, Finance and Operations |
| Jason Kovac | Dean, Academic Foundations |
| Scott Krumbuhl | Director, Facilities |
| Liz Pearce | Education/Child & Family Services |
| Gary Price | Regional Director, Linn County |
| Michael Quiner | Director, Information Services |
| Marc Rose | Faculty, Welding Technology |
| M'Liss Runyon | College Advancement/Marketing |
| Dale Stowell | Executive Director, Institutional Advancement |
| Lou Tarnay | Manager, Bond Program/Capital Construction |
| Sally Widenmann | Dean, Instruction |
| Katie Winder | Dean, Arts, Social Sciences & Humanities |
| Kathy Withrow | Assistant Director, Human Resources |
| Debby Zeller | Classified Representative; Admissions, Records & Registration |

FFA ARCHITECTURE + INTERIORS PROJECT TEAM

| | |
|----------------|--------------------------------|
| Troy Ainsworth | Project Principal |
| Richard Grace | Project Manager/Campus Planner |
| Ian Gelbrich | Campus Planner |
| Edward Running | Campus Planner |
| Joseph Storr | Production |
| Raquel Mansell | Production |



Above: Design team and FMPAC members discussing at the ceremonial entrance to the Albany Campus.



INTRODUCTION

Linn-Benton Community College (LBCC) was established in 1966 as a two-year public college. LBCC's 104 acre Albany campus is located just ten miles east of Corvallis, home to Oregon State University. LBCC has satellite campuses in Corvallis (the Benton Center) and in Lebanon and Sweet Home (the East Linn Centers). The LBCC Horse Center houses the Equine Management program just 1.5 miles north of the Albany Campus. A new Advanced Transportation Technology Center was opened in Lebanon in 2014, and is less than three miles from the Lebanon Center. Students can access academic support in the Learning Centers at each campus and in the Library on the main campus in Albany. The college has a campus bookstore, a small theater, a student run coffee house, and a gym and recreation area for student use.

LBCC is a comprehensive community college. Students attend LBCC for many reasons: to earn an associates degree or a transfer degree to a four-year college program; to obtain employment training or to improve existing employment skills; or to enrich their lives through continuing education. Over 19,000 students take at least one credit and/or non-credit class each year. Over 4,000 students attend LBCC full time, making it the sixth largest (of seventeen) community college in Oregon.

In 2013 the college undertook a facility needs assessment that identified a need for more career technical education opportunities, as well as more transfer courses in support of the school's Degree Partnership Program with Oregon State University. This initiated a campus construction campaign that resulted in the development of a \$34 million bond which voters approved in November of 2014. Several projects have been completed including an expanded culinary classroom with demonstration kitchen, and construction has begun on the Health Occupations Center and the expansion of the Advanced Transportation

Technology Center. The current construction program will add more than 84,000 square feet of additional instructional space and will renovate more than 150,000 square feet of existing space.

With such a recent expansion of space this master plan focuses on the utilization of existing space at the campus, instructional, and administrative levels.

CURRENT CAMPUS PROJECTS

Current campus construction includes a seismic rehabilitation project underway at Takena Hall and the expansion of the welding program taking place in Industrial A and C buildings. A new non-destructive testing program will take place in Industrial building A starting in September 2016.

Additional Seismic Rehabilitation grants are being submitted at the end of September 2016. Phase 2 of the main campus work is planned to begin summer of 2017. Work being planned include developing the space in Takena and Red Cedar Halls that will be vacated when all the healthcare programs move to the new Health Occupations Center in Lebanon. A major expansion project is planned For the Machine Tool, Mechatronics and Welding programs in Industrial A, B, and C buildings as the Heavy Equipment / Diesel and automotive programs will have moved to Lebanon. A donation from the business community and the City of Albany will allow the purchase of additional equipment to expand many of the CTE programs including, mechatronics, machine tool, welding fabrication and pipe welding programs. The details of how these programs will be expanded and how spaces will be utilized is currently under discussion with the design team.

FACILITY MASTER PLAN PURPOSE

This Facilities Master Plan will include updating the existing 2002 LBCC campus facilities master plan to assure short and long-range planning of college and facilities in accordance with accreditation requirements put forth by the Northwest Commission on Colleges and Universities (NWCCU). This Facilities Master Plan will guide current and future plans for the 10-year period specified by the NWCCU for accreditation.

This effort will be used as a preliminary step in developing projects for capital budget expenditures or revenue bond requests, evaluating and improving space utilization, identifying and removing obsolete spaces, prioritizing repair and replacement needs, acquiring or selling real estate, and any other information as required for accreditation.

In collaboration with the Facilities Master Plan Advisory Committee, the design team defined and recommended incremental plans to leverage, modernize, and optimize campus spaces and existing and future facilities. This effort also makes considerations for sustainable design, health and wellness of occupants, and the for safety and security.

Members of the Advisory Committee acknowledged that a significant factor in the success of this document is a constant review of the core tenets and the recommended strategies. In that way this master plan is viewed as a living document to discussed and amended over the next several years.



Above: Photograph of students using the courtyard

LBCC MISSION AND CORE THEMES

As part of the “Year Three Self-Study Report” from September of 2013, the college reestablished its mission and established a series of Core Themes as guiding principles. The statements are listed below and became the basis of the architectural goals outlined in the master plan.

MISSION:

- To engage in an education that enables all of us to participate in, contribute to, and benefit from the cultural richness and economic vitality of our communities.

CORE THEME 01 EDUCATIONAL ATTAINMENT

- Students will transition successfully to college.
- Students will successfully complete developmental coursework.
- Students will complete the general education requirements of their program.
- Transfer students will complete WR 121 and the college-level math requirements.
- Students will complete large mass credits early in their educational career.
- Students will be retained from term to term.
- Academic success will be demographically representative of our district.
- A majority of eligible residents of Linn and Benton Counties will hold post-secondary credentials.

CORE THEME 02 CULTURAL RICHNESS

- Students will display high level of civic engagement.
- Students will improve their ability to interact with values, opinions, and/or beliefs different than their own as a result of their experiences at LBCC.
- Students completing the designated cultural literacy/human relations courses will demonstrate attainment of cultural literacy outcomes.
- Individuals will feel welcome and included at LBCC.
- LBCC employees will improve their ability to interact with values, opinions, and/or beliefs different than their own as a result of their experience at LBCC.
- LBCC employees completing training will demonstrate attainment for cultural literacy outcomes.
- LBCC student will interact with an increasing number of students from diverse backgrounds.

CORE THEME 03 ECONOMIC VITALITY

- Graduates will meet industry standards by demonstrating mastery of technical skills and program learning outcomes.
- Graduates of Career Technical Education (CTE) programs will be employed in their field of study.
- Graduates of transfer programs will be enrolled in four-year institutions.
- Programs will respond to the changing needs of the industry and community.
- CTE graduates will have higher salaries, and the region will see a strong return on investment.



Above: Photograph of workshop



PROCESS

This Facilities Master Plan effort is the result of 19 weeks of working closely with LBCC Leadership and Facilities Master Plan Advisory Committee to understand, analyze, envision, and prioritize the improvements of the overall facilities of the institution. The design team and FMPAC participated in four interactive workshops and toured the facilities in Albany Main Campus, Advanced Transportation Technology Center in Lebanon, Benton Center in Corvallis, and Lebanon Center.

WORKSHOP 01 - GOALS

The purpose of this workshop was to introduce the campus planning team, establish a schedule and process for the team to follow, and confirm the goals of the college.

College President Greg Hamann tasked the design team and the Facilities Master Plan Advisory Committee (FMPAC) to consider not only the Northwest Commission on Colleges and Universities (NWCCU) accreditation requirements, but the diverse students it serves, cultural richness of the community, and campus aesthetic considerations to guide the master planning process.

The design team reviewed the specific requirements of the accreditation process. This established the parameters of the study to focus on physical facilities, not academic programs. The physical environment was to be accessible, safe, and of sufficient quality and quantity to support the institutions mission. The team confirmed the mission from the "Year Three Self-Study Report" and discussed each of the Core Theme objectives and their impact on the existing campuses.



WORKSHOP 02 - DEFINE THE LENS

Before beginning tours it was important for the design team to make sure that all stakeholders and campus planners were using the same set of criteria to evaluate the existing spaces.

To do this the design team reviewed the Core Theme objectives and translated them into a series of Architectural Goals. These goals gave everyone the same lens through which to view the existing facilities. These goal statements were reinforced with a discussion of the trends within higher education environments.

TOUR 01 - ALBANY CAMPUS

The design team and members of the FMPAC toured the Albany campus beginning at the ceremonial front door. The group moved through the campus evaluating and

discussing issues from a campus level to an individual space level.

Each member of the group was given a facility map with which to make comments and observations and areas of focus to concentrate any comments they might have. These areas of focus were:

- Campus Space
- Teaching Space
- Technical Teaching Space
- Administrative Space
- In-Between Space
- Infrastructure

Any comments were collected by the design team at the end of the tour and were incorporated into the facility analysis.

TOUR 02 - LEBANON AND CORVALLIS

The design team repeated the same process with the remaining campuses including Lebanon, the Benton Center in Corvallis, and the ATTC facility. The facility at Sweet Home was not toured.

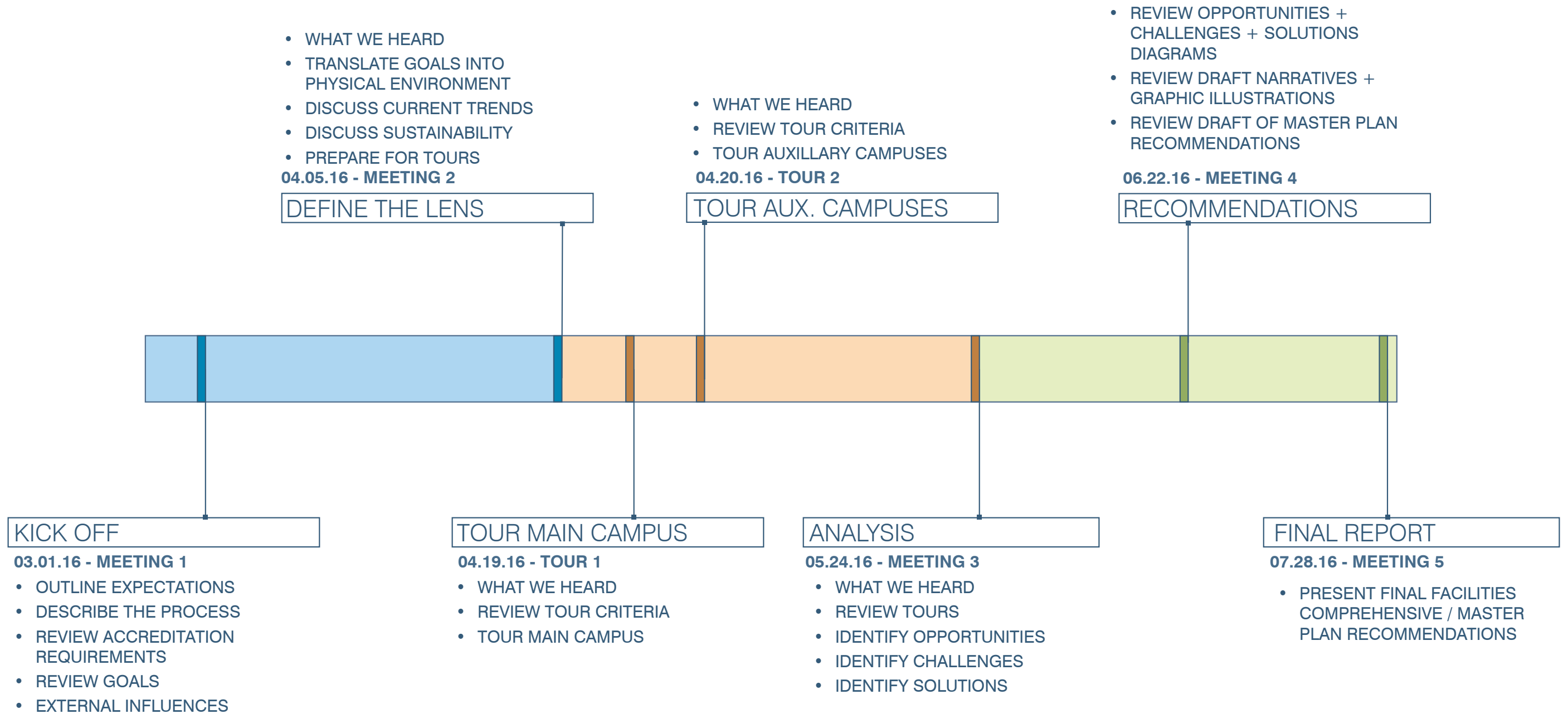
WORKSHOP 03 - ANALYSIS

Following the tours the group met again to discuss the existing conditions relative to the architectural goals. The design team reviewed each of the campuses and identified opportunities for improvement. The presentation included images from the tours and precedent imagery that illustrated general recommendations for each opportunity.

The design team met with the FMPAC on two more occasions, once to present a draft of the findings and the second time to present the final document.

Above: Design team and FMPAC members discussing classroom trends during a tour of the Albany Campus.





Above: Schedule Process Graphic

ARCHITECTURAL GOALS

As mentioned in the Process section, it was important for the design team to create a shared language for members of the FMPAC to review and critique LBCC's existing space.

In order to do this, the design team began with the evaluation of the college's Core Theme objectives as outlined in the the "Year Three Self Study Report." The Core Themes of Educational Attainment, Cultural Richness, and Economic Vitality, each have a subset of objectives that range from ensuring students transition to college to improving faculty and students ability to discuss issues of diversity.

To effectively translate these themes, the design team went through an exercise that mapped these objectives to the specific architectural goals. This mapping exercise can be seen in the appendix as part of the presentation of Workshop 02.

The most obvious architectural goal was to create strong learning environments, and nearly all the objectives related to the Core Theme of Educational Attainment were matched to this goal.

Studies have shown that strong relationships with faculty and peers encourage struggling students to seek help. Faculty are more aware when a student needs assistance. As such many of the same Educational Attainment goals were mapped to a goal of creating stronger relationships within the college. In addition, LBCC has a strong commitment to the surrounding communities and encourages student to display a high level of civic engagement. These objectives required this goal to expand to include the community as part of important networks to be fostered.

Many of the objectives tied to Cultural Richness focused on creating an environment that was not only inclusive, but

allowed for open expression and reception of multiple viewpoints. Throughout the objectives it was important for all members of LBCC, both faculty and students, to have strong cultural literacy.

Vocational programs are a large part of LBCC's history, and many of the objectives tie these programs back to the economic vitality of the region. Increasing enrollment in these programs requires technical spaces that are high quality and function as an advertisement to potential students.

Within the Core Themes, there are objectives that encourage the college to be responsive to the changing needs of regional employers. To do so requires spaces that can be easily reconfigured. Flexibility should exist for short term reconfigurations and long term renovations.

Sustainability was not a specific goal relative to the Core Theme objectives but was discussed within the group as something that was important at an aspirational level as well as a practical level. Discussion was mostly focused on practical solutions that improved the efficiency and operations of the existing physical resources.

Once these Architectural Goals were established the design team then reviewed trends in the design of these types of spaces.

CREATE GREAT LEARNING SPACES THAT SUPPORT EDUCATIONAL ENRICHMENT

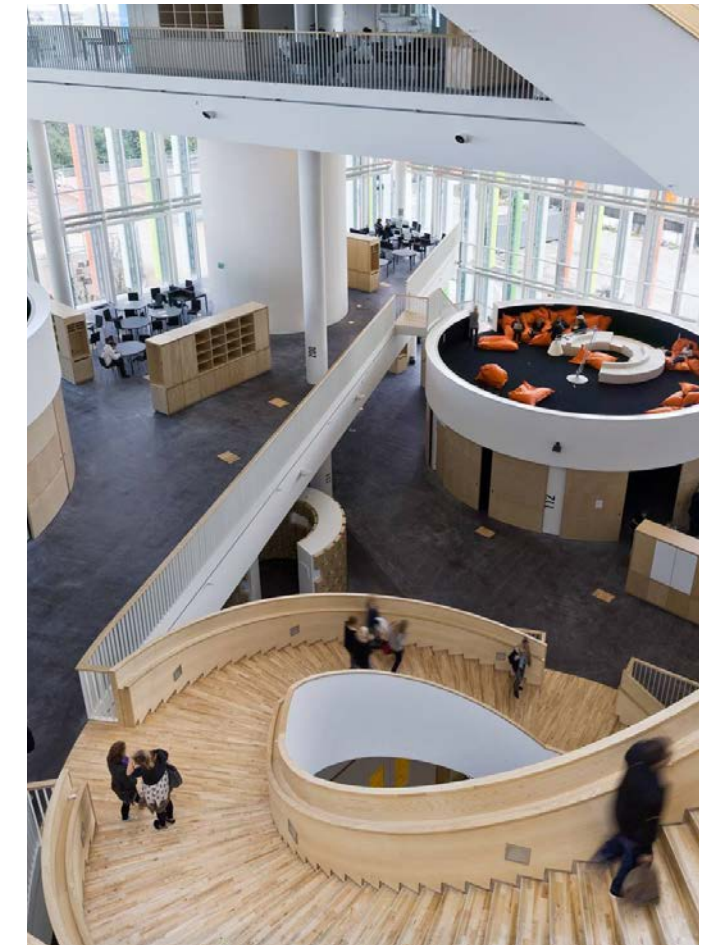
The nature of learning spaces has changed dramatically with the introduction of technology and increased understanding of how students learn most effectively. New spaces should place focus on the student/teacher relationship and the ability to learn in both group and individual settings.



Confluence Building - Community College of Denver

CREATE SPACES THAT STRENGTHEN EDUCATIONAL SUPPORT NETWORKS BETWEEN FACULTY/PEERS/COMMUNITY

Strong relationships have been shown to aid in educational achievement and follow through. Personal networks are often built outside the classroom, and space must be designed to encourage chance interactions that can lead to supportive relationships.



Orestad High School - Copenhagen



CREATE SPACES THAT ENCOURAGE CONNECTION AND EXPRESSIONS OF DIVERSITY

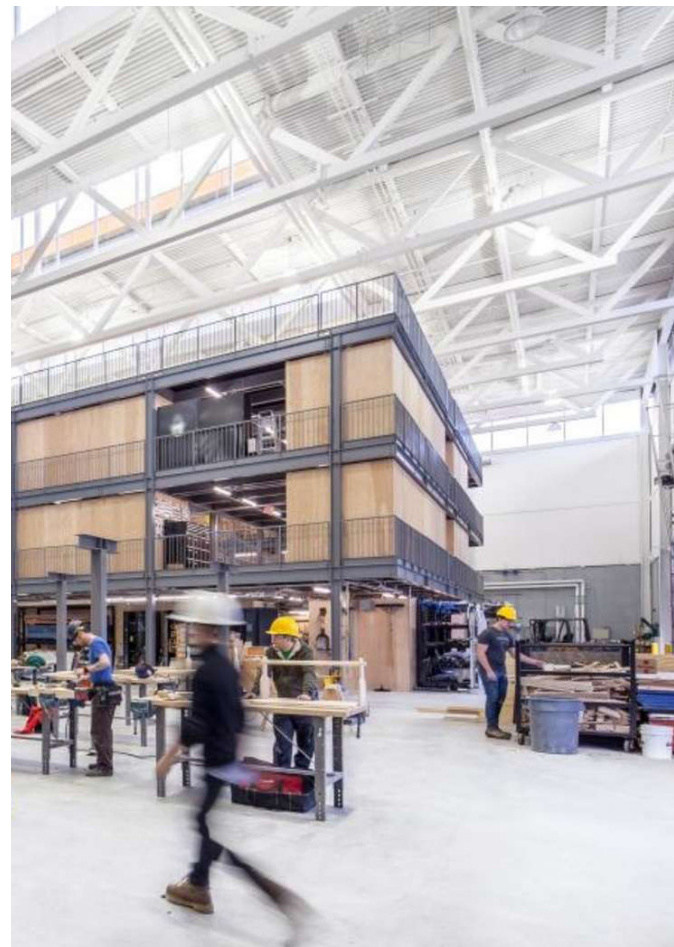
It was recognized that the physical environment may have only limited ability to encourage diversity. Where possible, spaces should support the discussion and the opportunity for a form of expression or impression that allow diverse groups to feel at home.



Mural

CREATE SPACES THAT RAISE THE PROFILE OF TECHNICAL EDUCATION PROGRAMS

Technical or vocational spaces are often considered secondary programs with lesser quality space. Given the importance of these programs to LBCC, technical spaces should be upgraded to be brighter and more open with strong connections to the rest of the LBCC community.



Kawartha Trades and Technology Centre - Flemish College

CREATE SPACES THAT CAN ADAPT TO CHANGING NEEDS

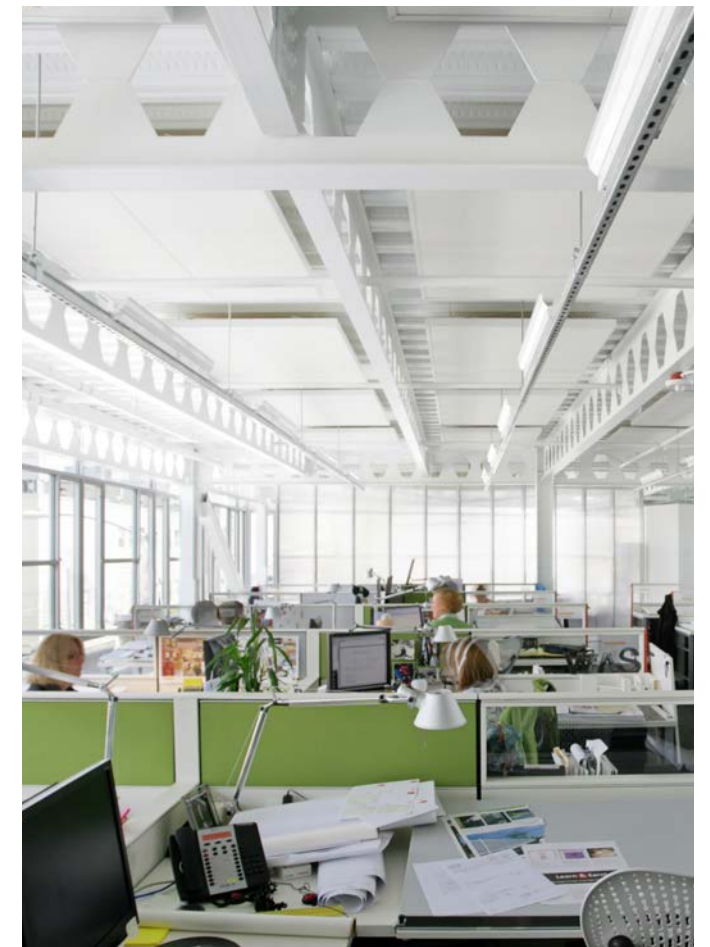
Educational programs and administrative positions are in a constant state of fluxuation. It's important to define spaces that can accommodate multiple functions and the ability to change configuration with minimal cost and waste.



Kathlyn Joy Gilliam Collegiate Academy - Dallas

SUSTAINABILITY

Given the parameters set on the master plan, the topic of sustainability was limited to a focus on increasing operational and performance efficiency as well as strategies to improve the health and wellness of existing spaces.

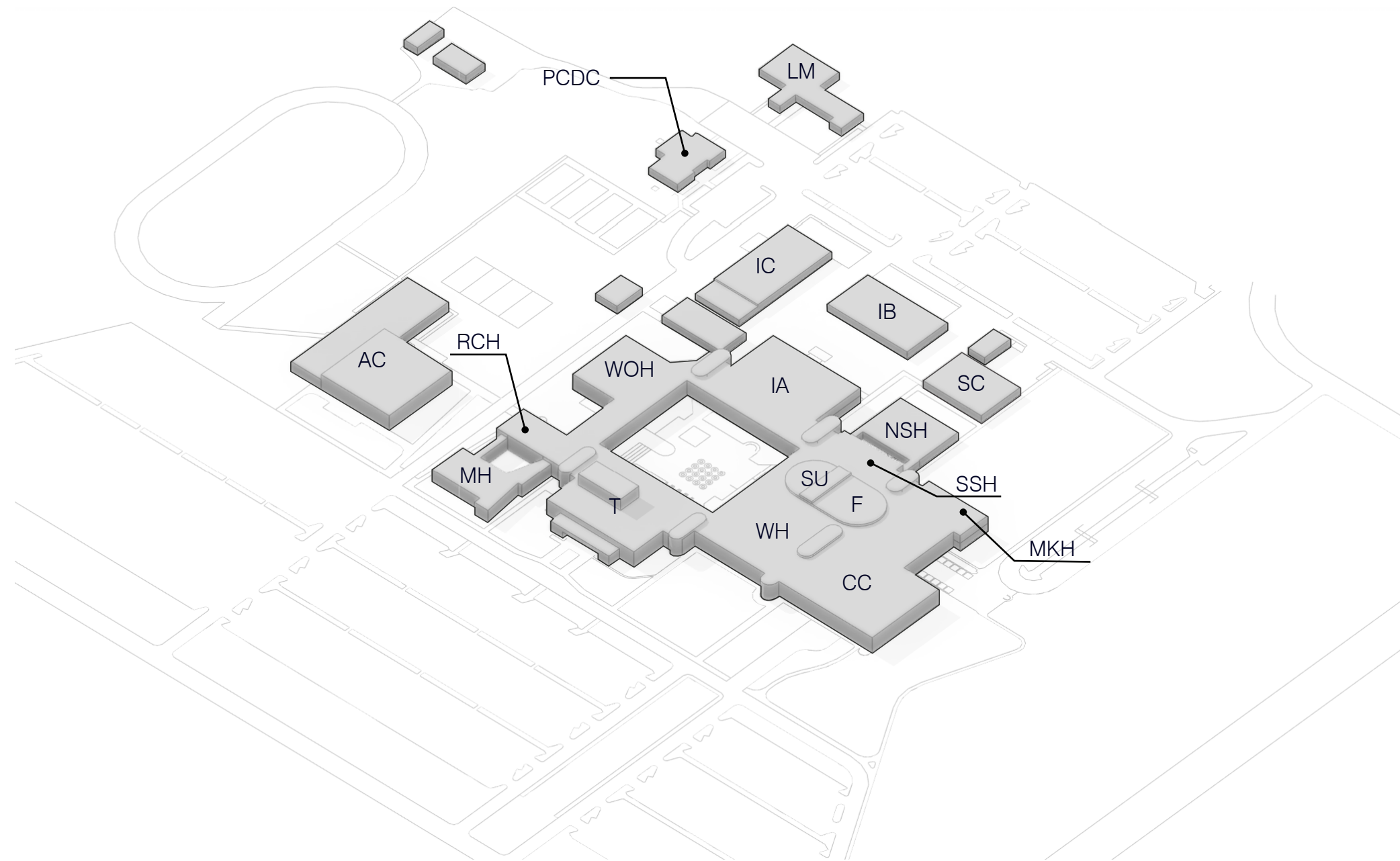


Open office environment



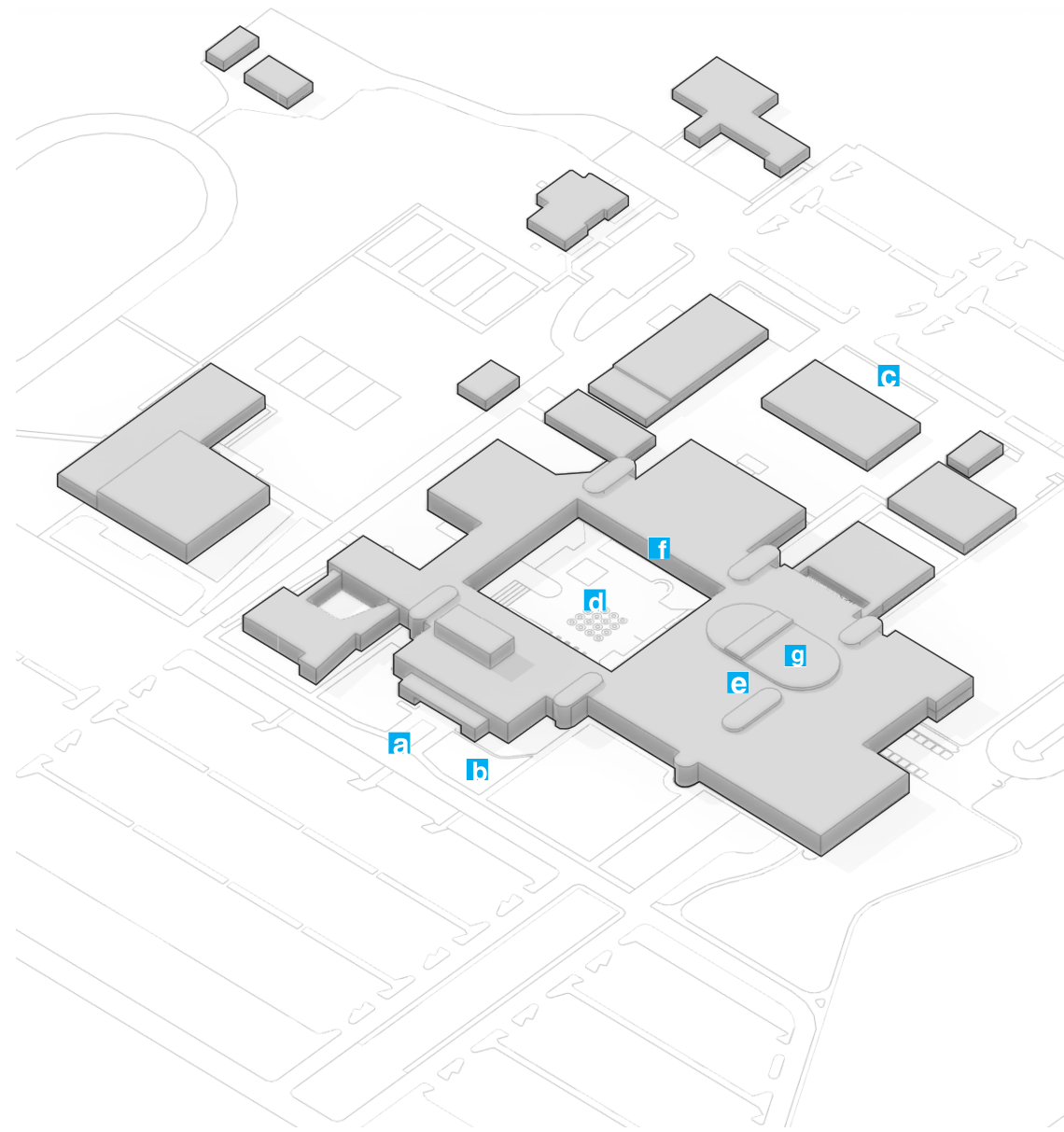
ALBANY CAMPUS





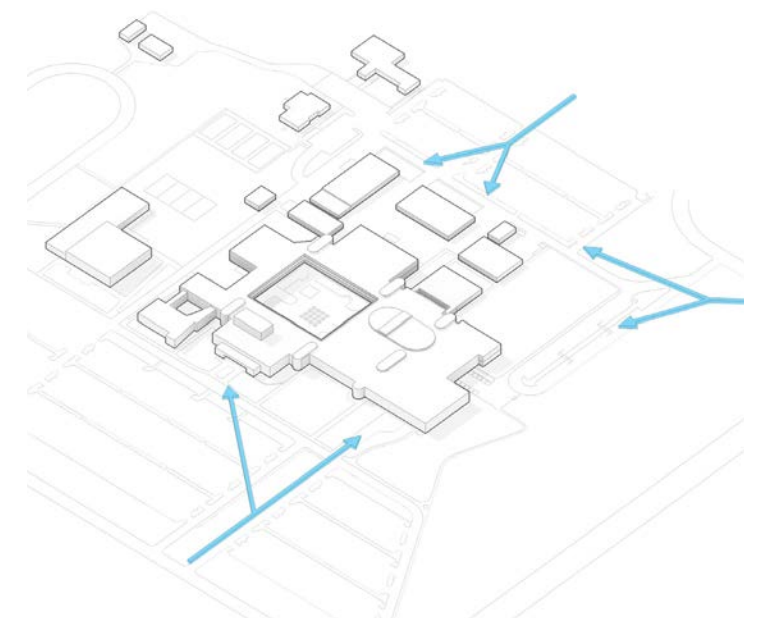
CAMPUS BUILDINGS

- AC Activities Center
- CC Calapooia Center
- F Forum
- IA Industrial A
- IB Industrial B
- IC Industrial C
- LM Luckiamute Center
- MH Madrone Hall
- MKH McKenzie Hall
- NSH North Santiam Hall
- PCDC Periwinkle Child Development Center
- SC Service Center
- SSH South Santiam Hall
- RCH Red Cedar Hall
- SU Student Union
- T Takena Hall/Albany Community Education
- WH Willamette Hall
- WOH White Oak Hall



OPPORTUNITIES

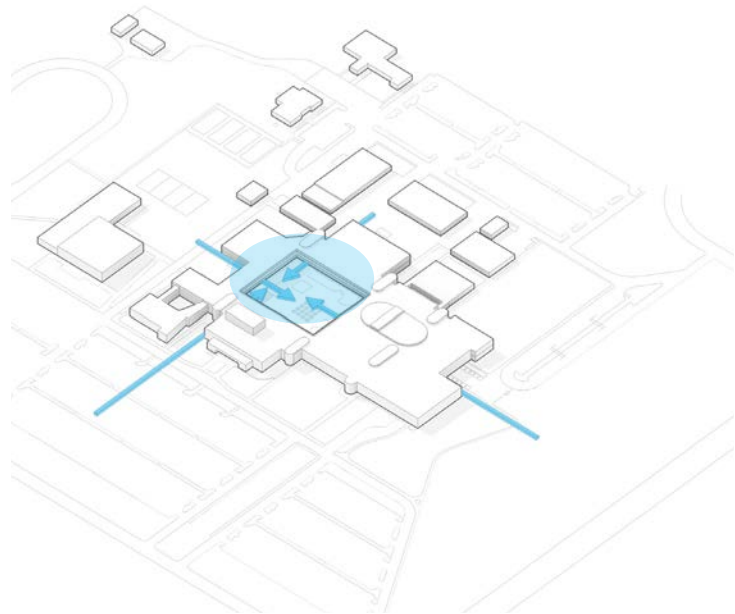
- a** Create a Sense of Arrival on Campus
- b** Redefine Transit Hub
- c** Create a Friendly Campus Edge
- d** Redefine the Courtyard
- e** Create In-Between Spaces
- f** Showcase Unique College Programs
- g** Transform the Forum Into the Heart of the Campus



VIEW CORRIDORS

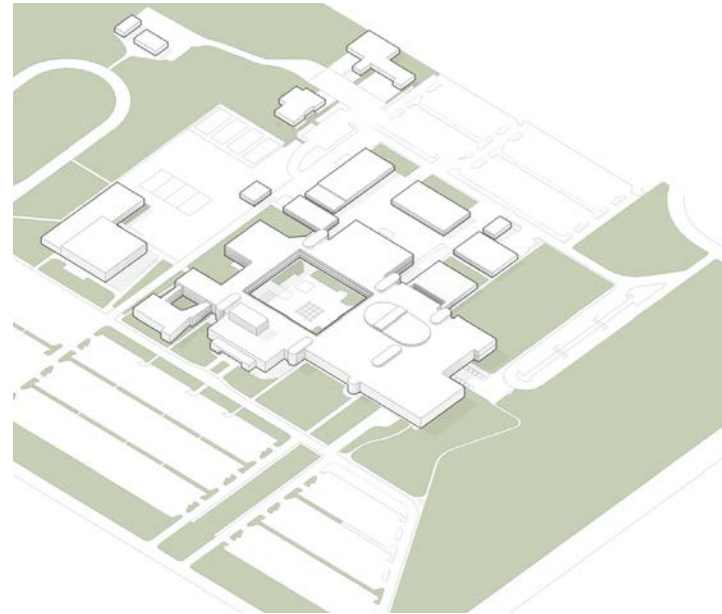
The sense of arrival and approach to the campus will influence what type of impressions the students, visitors, and staff will have on LBCC. All the elements that define the edges of the campus should be considered in redefining the image and the character of LBCC. Landscaping, clear wayfinding, open and welcoming buildings, warm natural materials, lighting, and art installations are elements that can be incorporated to the overall campus incremental improvements.





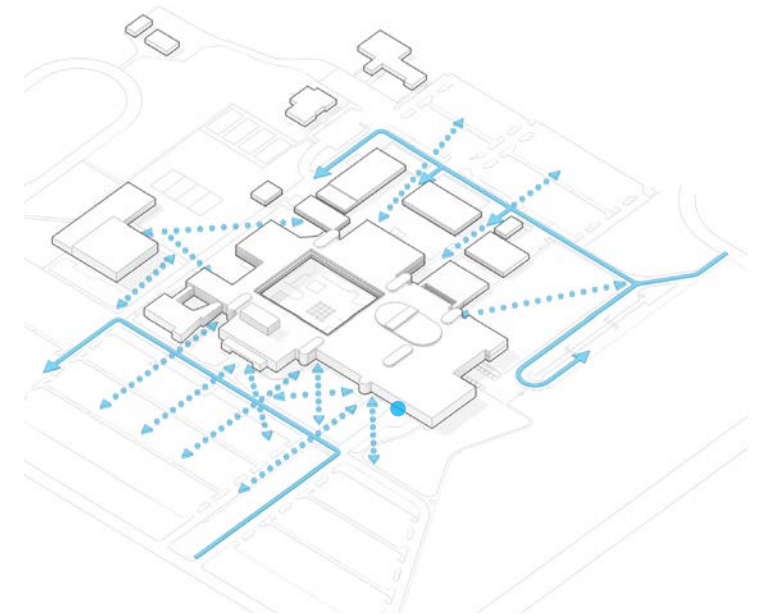
CONNECTIVITY

The existing campus planning framework is organized around the central campus courtyard, yet it has very limited appeal and therefore needs to be redefined. There are great opportunities to enhance the visual and physical connections of all the buildings and the circulations around the courtyard. These connections will increase the utilization of the courtyard and create more vibrant and active outdoor learning spaces for the campus.



GREEN SPACE

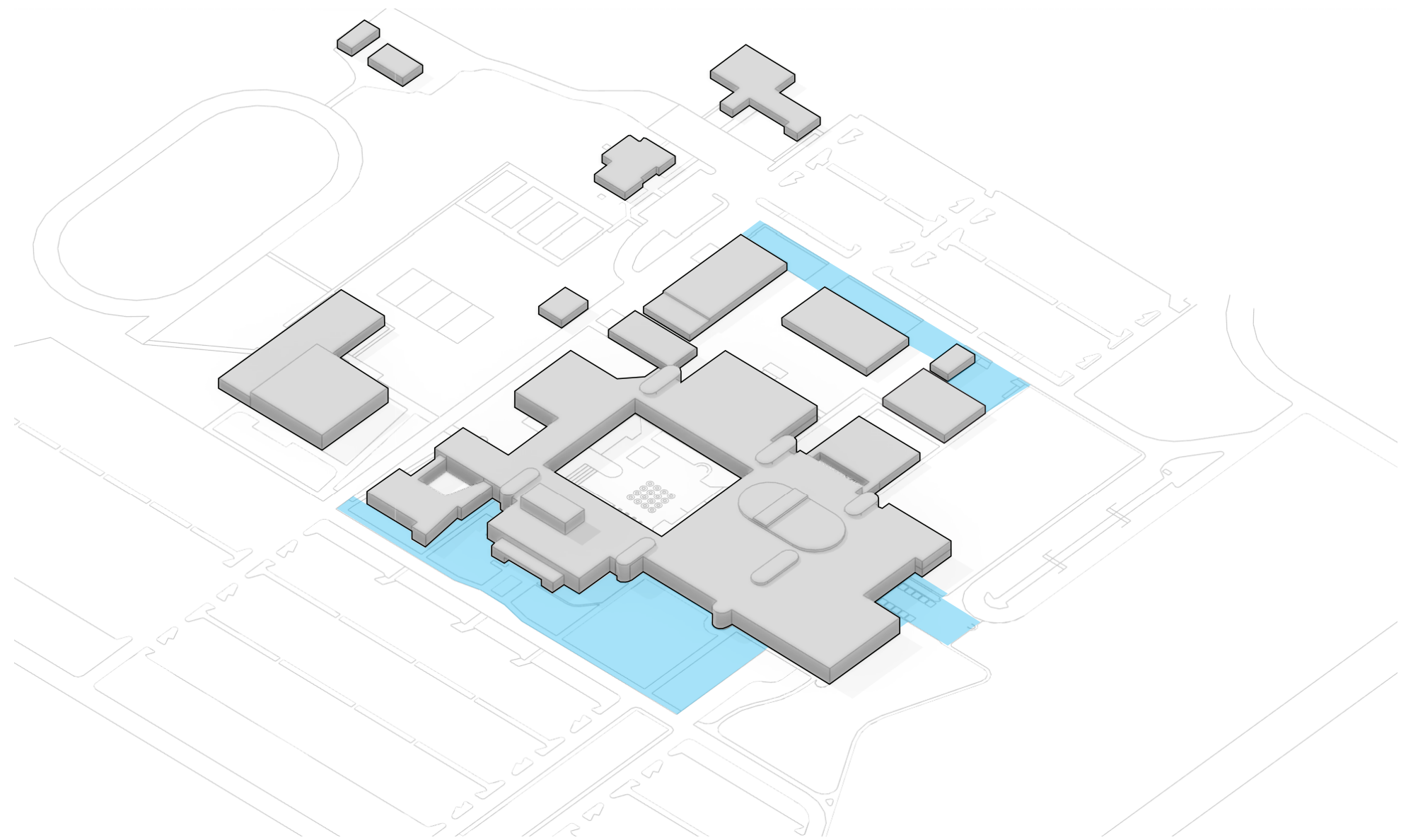
Green spaces surround all the campus buildings on the perimeter. There are great opportunities to weave green spaces between existing buildings, within the a redefined central courtyard, and future buildings. They can be utilized as part of the daily campus learning experience. These spaces can become outdoor informal learning and working spaces.



CIRCULATION

The existing network of circulation on campus is very well defined. The energy and vitality of the school can be greatly improved by providing informal gathering areas along this network of in-between spaces. Pedestrian movement can be strengthened by adding additional paths that support the tendency of people to diagonally move in open spaces to shorten their travel. Better definition and / or separation of vehicular, mass transit, and pedestrian circulations can also create a safer campus environment.





SENSE OF ARRIVAL

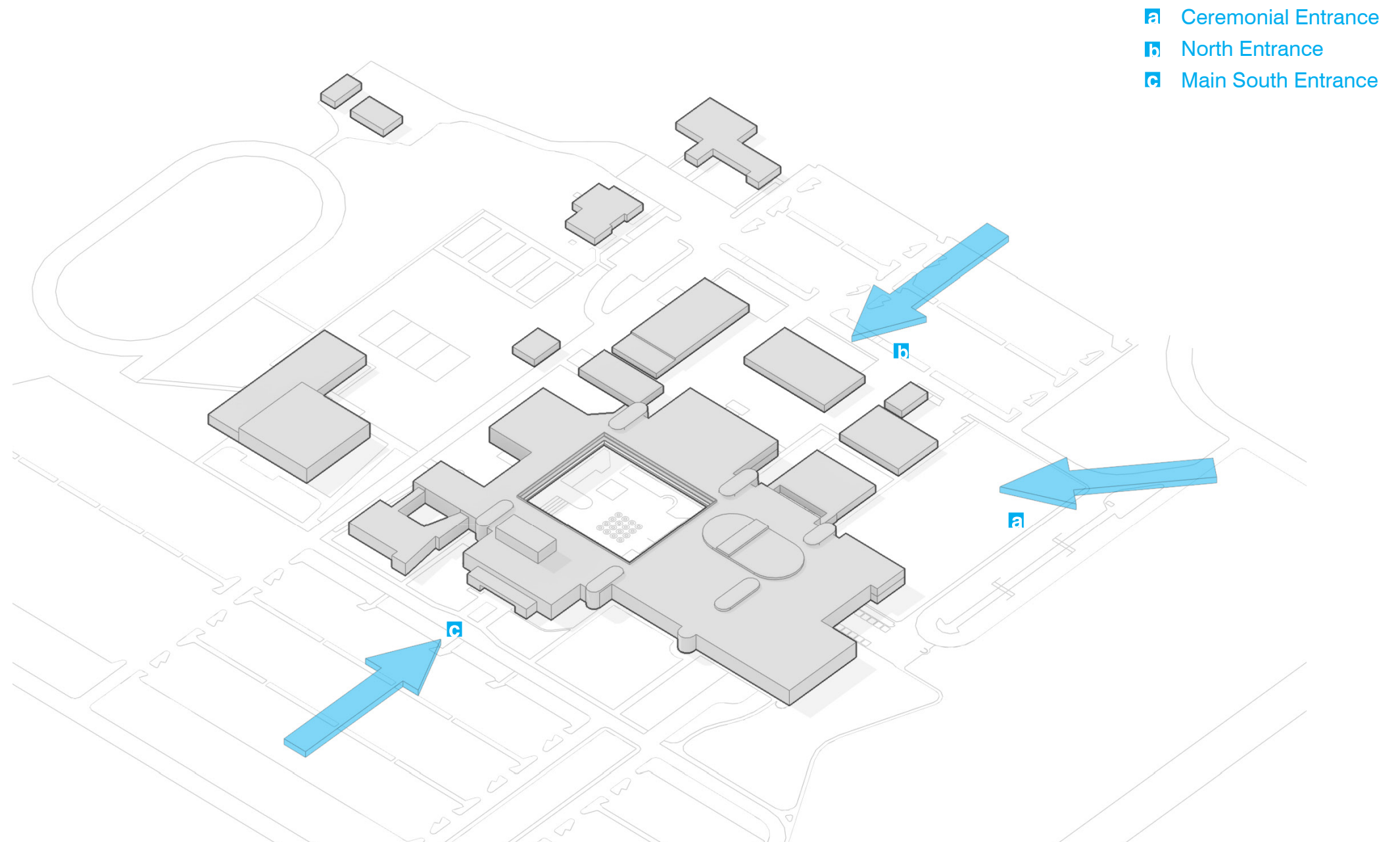
SENSE OF ARRIVAL

When people arrive to LBCC's Albany campus, they should intuitively know that they are on an LBCC campus. For prospective students, faculty, and visitors, the sense of arrival and approach has an enormous impact on their first impressions of the institution. For people that travel to the campus for work or classes, it sets the tone for what their daily experience will be. It is paramount that these experiences are energizing, inspiring, and reflect both LBCC's brand and values.

The ceremonial approach to the campus occurs from the northeast via SW Ellingson road. This creates a challenge because this edge also serves as the back of house to many of the campus functions. Despite being the symbolic entrance to the campus, visitors are greeted with views of loading docks, garbage collection areas, and parking lots.

While the planned "front door" of LBCC's Albany Campus lies at the northeast entrance, most current students and faculty arrive via the south parking lot. This creates a breakdown in the sense of arrival on campus as the south parking lot was never intended to be the face of campus. As most people's first point of interaction with LBCC, it is important that the sense of arrival be addressed.

The current building construction on LBCC's Albany campus is monolithic concrete. Monolithic concrete at the current scale is imposing to pedestrians as they approach the buildings. The buildings feel massive, heavy, hard, cold, and aren't complementary to the human scale. This fails to create an inspirational learning environment that reinforces LBCC's core values. The current sense of approach needs to shift from approaching hard imposing objects, to that of a warm supporting campus.



Above: Diagram of sense of arrival



CEREMONIAL ENTRANCE

While the planned ceremonial entrance from the northwest has not evolved as the campus “front door,” it can still make a large impact on the campus. Updating the ceremonial entrance to be used for high-profile visitors, prospective students, and dignitaries would be impactful.

Updating the entrance should focus on strengthening its connection to the Forum. The Forum’s connection to the campus would be undeniable, and people arriving on campus from the ceremonial entrance will find themselves at the foot of this imposing structure. Enhanced pedestrian flow from the loading zone by re-orienting the approach will guide people through the center of the Forum, creating the opportunity to view the campus beyond.

Activating the entrance to the Forum would go a long way to enhancing its effect on visitors. Developing the exterior courtyard to not only act as a ceremonial approach, but also to facilitate seating and interaction, would help make the entrance more engaging and energetic. This would also allow people who are waiting for transportation to and from this entrance to have a place to gather.

The current landscaping and lighting should be updated to create an engaging entrance. The parking island can become a feature, and trees and plantings could be designed to provide a gateway to campus and provide shade and cooling for parked cars.

Parking striping and crosswalks can be expressed through integration with the landscape and contrasting materials as opposed to paint. The use of pavers, concrete, and green space can transform the parking lot itself into a graphical artistic display that presents itself as the ceremonial entrance as opposed to being just another parking lot.

NORTH ENTRANCE

The ceremonial entry is limited in size and parking capacity, and as a result, many people who are arriving on the north side of the Albany campus will do so through a parking lot to the west. People arriving from this area will effectively enter the campus from the north entrance. The north edge of campus houses many of the specialized trade buildings and storage areas that service these functions.

Updating the northwest entry should focus on screening undesirable views and creating more pedestrian friendly connections. Despite being large, the current parking lot only offers a single crosswalk to enter campus. This is inconvenient and creates a potentially dangerous mix of cars and pedestrians crossing in unsafe locations. Additional connections need to be made from the parking lot to campus. Signage and speed tables alerting drivers to the presence of pedestrians will slow down traffic and enhance the safety of pedestrians on the site. Current sidewalks from the northwest parking lot direct pedestrians to parking lots and industrial storage areas. These should be reconfigured to allow pedestrians to move safely from the northwest parking lot to the main campus buildings. This can be accomplished through the use of dedicated walking paths that separate pedestrians from vehicles and storage areas.

Pedestrians approaching from the northwest parking lot are greeted by views of loading docks, parking lots, garbage bins, and industrial storage. This creates an unwelcoming edge for many people who arrive on campus.



Above: Photographs of existing conditions

MAIN SOUTH ENTRANCE

The south approach to LBCC's Albany campus acts as the functional front door to campus. The first impression is from the parking lot. Though it is the acting front door of campus, the south entry is not treated as such, and therefore should reflect more prominence.

Current crosswalks zig-zag through the parking lot and are off-axis from logical building approaches. Creating dedicated pedestrian walkways that are strategically aligned to the buildings will help frame views and create a more impactful experience as people approach campus. Using contrasting materials and buffering with surrounding hardscape will soften the campus approach.

The landscape needs to be updated along the south entrance. Trees need to be consistently trimmed, and plants at the end of their lifecycle need to be replaced. Vegetation planted at the edge of buildings needs to be consistently arranged and maintained. Trees can be chosen and strategically planted so that they create edges and outdoor rooms, as opposed to current use just acting as a buffer.

Current walkways to Takena Hall offer opportunities to create an active exterior space. Using a variety of furniture types and occupiable landscape elements will allow people to engage the courtyard beyond just moving through it.

The existing building construction creates a character that is heavy, hard, and unwelcoming. Using light materials to penetrate the opaque facades would provide views into the buildings and make them feel lighter. Providing visual connections to the interior of buildings creates intrigue and aids in drawing people into the space as opposed to the current design which acts as a barrier. Creating transparency at building entrances will help to identify building entries.



Left: Photographs of existing conditions



BRANDING

Whether intended or not, signage, light fixtures, screening, and other elements installed on campus contribute to the campus brand. While these elements are required to create a functional campus, they also offer opportunities to showcase LBCC's brand and special programs.

Upon arriving on campus, it is important to clearly communicate to people that they have arrived on an LBCC campus. To accomplish a brand approach, priorities are set with design elements established, and these are used consistently throughout the entire campus.

Constructed elements such as screens and site furniture can be designed and constructed by the AutoCAD, CNC routing, and welding programs. These programs can be used to design and construct site walls, site lighting, signage, hand-railings, bike-racks, and other required furnishings. Leveraging the unique talents of the students and faculty to design and create these elements will help create a consistent language for the campus. It also reinforces the brand by creating a compelling story about who LBCC is and their core values.

WAYFINDING

When arriving on campus, people should be able to quickly orient themselves and clearly identify destinations and points of circulation. This is accomplished through various means of wayfinding.

Signage should be clear, legible, and consistent throughout LBCC's campuses. This will not only reinforce LBCC's brand, but clarify how people should move through the campus. Pathways and landscaping should also be strategically implemented to promote clear wayfinding throughout the campus. Catering to through creating a hierarchy leads people through campus.

LANDSCAPING

Thoughtful landscaping can help enhance the sense of arrival on campus. Selecting plants that can thrive with an appropriate complementary scale, and using them in a consistent manner helps create a common language that will make the campus read as a whole.

Landscaping elements can provide a cohesive campus. Like plant selection and implementation, grooming and upkeep methods must have a consistent language across the campus. A good proactive measure is to create a plan to address the life-cycle of campus plantings.

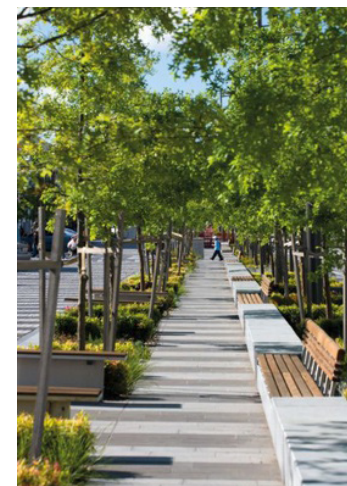
Landscaping can be used to conceal less desirable portions of a campus such as screen loading docks and trash bins. This can be accomplished using earth berms, shrubs, tall grasses, and trees.

Landscaping can also be used to guide people through the campus. Utilizing strategic plantings, tree rows, designed pathways, and slicing through earth berms can create a physical and visual connection that will help to orient people, and enhance the approach to building entries and gathering places throughout the campus.

LIGHTING

Lighting can also be used to amplify the campus brand and identity. If used in a consistent manner, strategically placed lighting can identify entrances, highlight campus features, increase campus safety, and enhance wayfinding.

Lighting must be used consistently throughout a campus to help establish a hierarchy that can be used to draw attention to certain features and lead people through spaces. Correct use of lighting can draw attention to features, as well as screen less desirable areas.



Top Left: Inspirational photographs of branding
Middle Left: Inspirational photograph of wayfinding
Bottom Left: Inspirational photograph of landscaping
Bottom Middle: Inspirational photograph of branding and wayfinding
Top Right: Inspirational photograph of wayfinding
Bottom Right: Inspirational photograph of lighting

BUILDING AESTHETICS

The first recommendation to address the issues of heavy, opaque materials is to increase the penetrations at the perimeter of the campus buildings. Openings can be strategically punched in the brick and concrete facades to allow the installation of storefront glazing systems. In addition, the precast concrete panels that create datums and act as guardrails at the second floor can be modified to be more transparent or removed entirely.

Strategically penetrating the facade and replacing heavy precast elements would make the buildings feel much lighter. People approaching from the exterior would no longer be welcomed by large heavy walls, but rather by the functions and activities taking place within. Likewise, the interior of the campus facilities would be drastically transformed. Increasing the amount of glazing would allow more views and daylight into interior spaces. Employees and students would have views to the exterior, to the activity on campus, and to nature beyond. Replacing precast concrete railings with a transparent material will allow the exterior walkways to feel more open and inviting.

The second recommendation is for concrete and brick to be cleaned to remove accumulated grime and restore them to their original appearance. In addition, through various treatments, the precast concrete bands can be treated through different surface preparations like staining and sandblasting. The surface treatment could incorporate graphic elements to aid in branding or wayfinding. An alternate approach to the concrete would be to paint these areas, though this would present long-term maintenance issues.

Imprinting can occur through the application of murals in select areas. Employees and students can lend their voice to the campus brand either through products created in classes, or through art competitions which could influence signage, wayfinding, or murals. Additionally,

more temporary imprinting can be facilitated through chalkboard or whiteboard paint.

The existing glazing system is also an impediment to creating buildings that feel light. Despite being a window with visibility from the interior, dark tinted glazing reflects the surrounding environment and appears opaque from the exterior. While most typical facades read as solid (walls) vs. void (windows), the glazing on the Albany campus reads as entirely solid because of the lack of visibility to the interior.

It is recommended that existing glazing systems be replaced with a mixture of transparent and translucent glass. Transparent glazing would allow uninterrupted vision both into and out of existing buildings. In doing this, the scale of the existing facades would be broken up, and the buildings would feel less heavy and imposing. Clear glass could be used to selectively allow views into buildings to help display the activity within.

In sensitive areas, or areas where increased security is desired, translucent glazing can be installed. Translucent glazing allows natural daylight to interior spaces while limiting visual exposure.

Daylighting must be controlled for optimal results. West, south, and east facades with large amounts of glazing should be protected by some sort of screening. Ideally, screens would be external to the building, allowing more heat to stay on the outside. Screens can be constructed of various metals, such as aluminum and steel. Screens can be designed with different patterns, colors, and profiles, which could be embraced as a branding opportunity. Perforations can create patterns that are encoded with the college brand. The materials and language created by window screening can have an influence on architectural and landscape installations elsewhere on the campus. For instance, site and building lights could be created of perforated metal which could be designed and/or fabricated by LBCC students. The materials, patterns,



and colors can also be used in the many screens that will appear around campus. Garbage cans, industrial storage, mechanical equipment, and loading docks are all examples of elements that should be screened. Each one of these conditions offers an opportunity to tie into the large architectural vocabulary.

People have been shown to have a positive response to environments that incorporate a biophilic approach in their design. The presence of plants, organic patterns, textures, and materials elicits a natural connection within people that is referred to as the "biophilic response." This response is intuitive to humans and is important to our physical and mental well-being. Biophilic responses help reduce stress, boost energy, enhance concentration, and help people to increase awareness and focus. Through the use of innovative strategies throughout the campus, LBCC can capitalize on these innate emotional responses to nature.

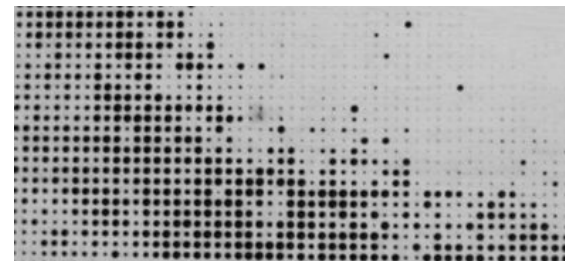


The current building materials on campus are hard, cold, and don't elicit a biophilic response. While bricks and concrete are natural materials, they don't offer warmth or re-occurring natural patterns. These patterns can be produced in materials, such as through screen perforations and dappled light.

Another easy way to incorporate natural patterns and regional material is through the use of wood. Wood is a warm, light natural material that evokes a connection to nature. Wood can be incorporated on the underside of canopies, in landscaped paths and installations, and strategically positioned internally to be viewed from the exterior. Interior screens, walls, artwork, built-in furniture, and signage are all viable uses for wood throughout campus.

Above: Photographs of existing conditions





Left: Inspirational Images of potential new materials.

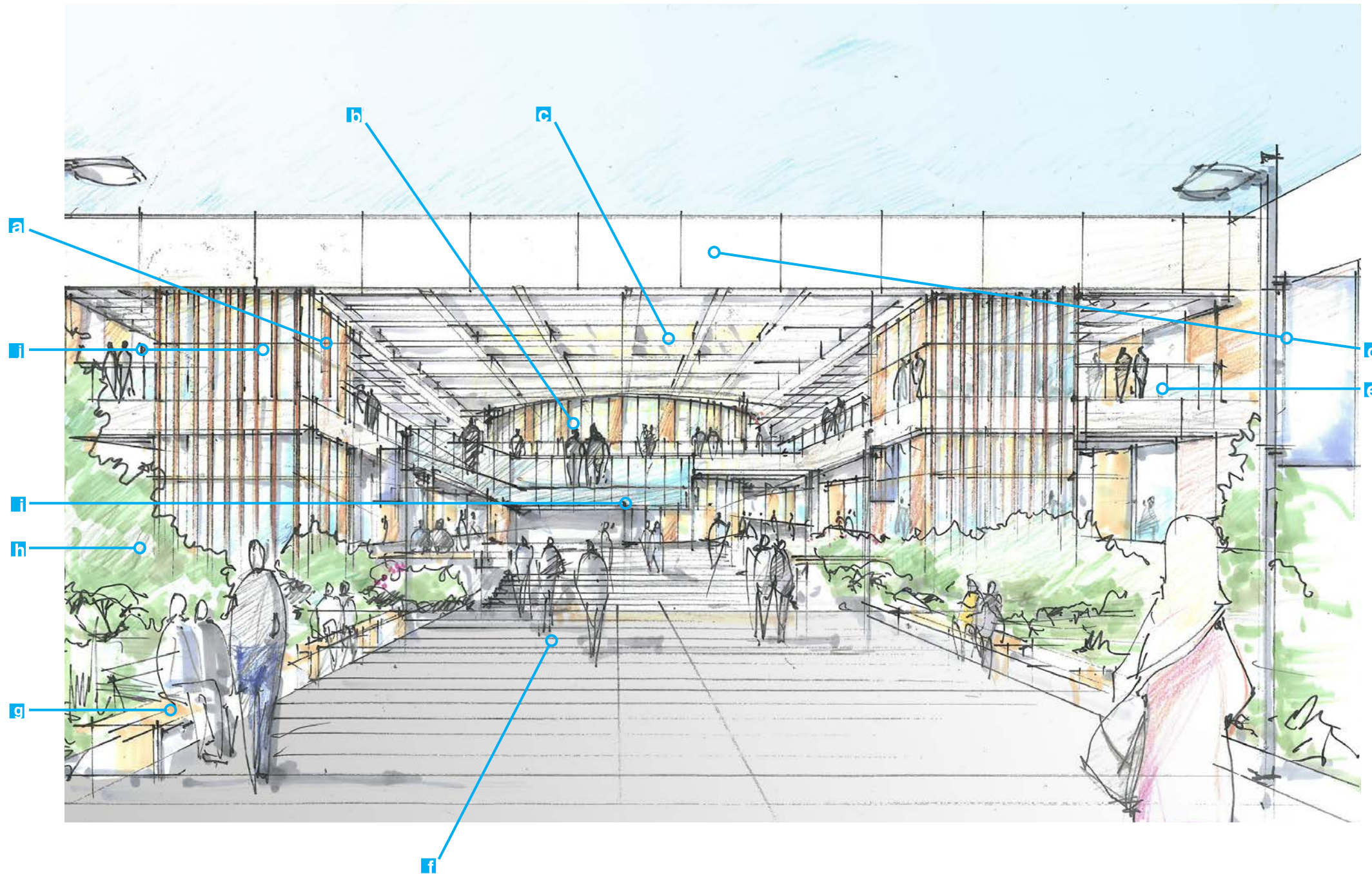


- a** Create daylight and openness in stairwell
- b** Provide appropriate lighting for safety, efficiency, and wayfinding
- c** Branding opportunity for the identity of campus in a festive character
- d** Increase glazing and transparency
- e** Screen unsightly service area
- f** Variety of informal gathering options along circulation pathways
- g** Thoughtful use of appropriate plantings
- h** Redefine building entries with welcoming sheltered front door



Above: Photograph of existing condition and inspiration sketch illustrating building aesthetics



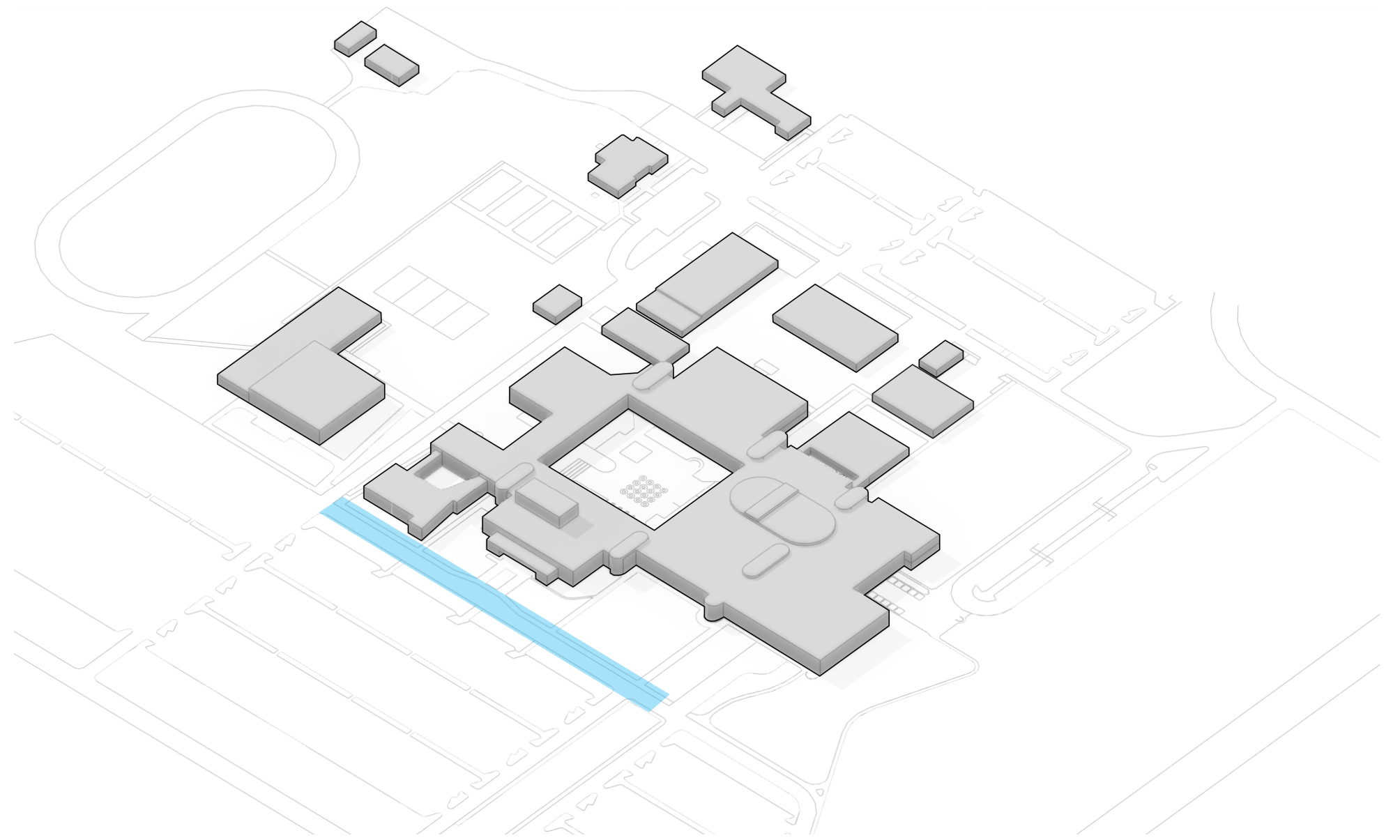


- a** Warm, vibrant, and natural materials
- b** Create a transparent Forum exterior for more welcoming appearance
- c** Expand skylight area to bring warmth and visual clarity
- d** Branding opportunity for the identity of campus in a festive character
- e** Minimize and lighten existing architectural elements
- f** Clarity of orientation and identification of destinations
- g** Accommodate variety of informal gathering options
- h** Thoughtful use of appropriate plantings
- i** Intuitive sense of place, welcoming "front door"
- j** Transform key edges "education on display"



Above: Photograph of existing condition and inspiration sketch illustrating building aesthetics





REDEFINE TRANSIT HUB

REDEFINE TRANSIT HUB

LBCC is studying expanded capacity with regional transportation providers, because the current bus drop-off and pick up zone does not accommodate sufficient buses at once. If LBCC is to increase their capacity for transit-oriented visitors, it will need to plan for a dedicated transit hub.

The current transit hub at LBCC is missing key components that are inhibiting it from becoming a highly functional space. The existing bus drop off is identified only from a small sign at the edge of a sidewalk. The drop-off location is not easily recognizable and is easily missed. Additionally, there is no weather protection for transit riders as they board, de-board, and wait for buses. The lack of weather protection forces students to gather inside of Takena Hall to wait for buses. This conflicts with the building programming as it is not designed to support this use, and it breaks the important visual connection between riders and drivers by forcing waiting riders inside of a building instead of allowing them to queue next to the bus drop off.

The current limit of not being able to serve sufficient busses at a time also creates a dangerous mix of cars, buses, and pedestrians. The pedestrian flow from the parking lot across two lanes of traffic used by buses and cars is poorly identified, and there are no mechanisms employed to help slow down traffic.



WAITING SPACE

It is imperative to create a dedicated waiting space for passengers that utilize mass transportation to and from campus. Waiting spaces should be easily identifiable, intuitive, safe, and protected from the weather.

Waiting spaces also provide opportunities for spontaneous interaction. Students and employees that utilize the bus system will have ample opportunity to engage in conversation and share information. Consequently, it is important to support these chance interactions by providing a variety of seating options to support these impromptu conversations.

WEATHER

Protecting riders from exposure to the weather is an important function for a transit hub. Riders can potentially wait long periods of time for a bus to arrive at a stop, and they should not be exposed to the elements the entire time. Adequate shade, wind, temperature, and precipitation protection should be provided from collectors that are being installed on the site.



Canopies can create cover from the rain. Site walls and screens can help break the wind, and infrared heaters can economically provide warmth in instances of extreme cold. It is important that weather protection be provided at the point of drop off and pickup as riders need to be present to communicate to the driver that they are in need of a ride. Separating weather protection from the bus stop limits the visibility of both the bus as well as the riders, resulting in missed buses and potentially hazardous situations.

SAFETY

The intersection of pedestrians and vehicles naturally creates hazardous conditions. These hazards are compounded due to the wide range of hours and lighting conditions in which the hub will be used. Students arrive and leave from campus at all hours of the day, often times in the dark. Providing adequate lighting is a way to enhance rider safety. Providing lighting not only enhances the visibility of riders while they wait during early morning or night time hours, but they also make the riders more visible to bus drivers, reducing the risk that they get overlooked by a moving vehicle.



The current traffic flow only allows one bus to drop passengers off at a time. Expanding the lanes to allow for more than one bus to service passengers while allowing for unobstructed car flow will create a more streamlined traffic flow. More clearly identifying pedestrian crosswalks, and the addition of a speed table to slow down traffic, would increase rider safety. Providing visual control of the waiting area is another way to enhance rider safety. Visual control means more people are able to observe passengers at the hub, which reduces the likelihood of crimes occurring.

BRANDING

With the high volume of people that move through it on a daily basis, and its prominent location on campus, a future transit hub offers a prime opportunity for amplifying LBCC's brand and to advertise to current and potential students.

The location of the current bus stop is in close proximity to the largest parking lot on campus. As a result, most of the students and faculty will walk past the transit hub every day. Additionally, buses that serve LBCC will have

Above: Photographs of existing conditions at the LBCC transit stop



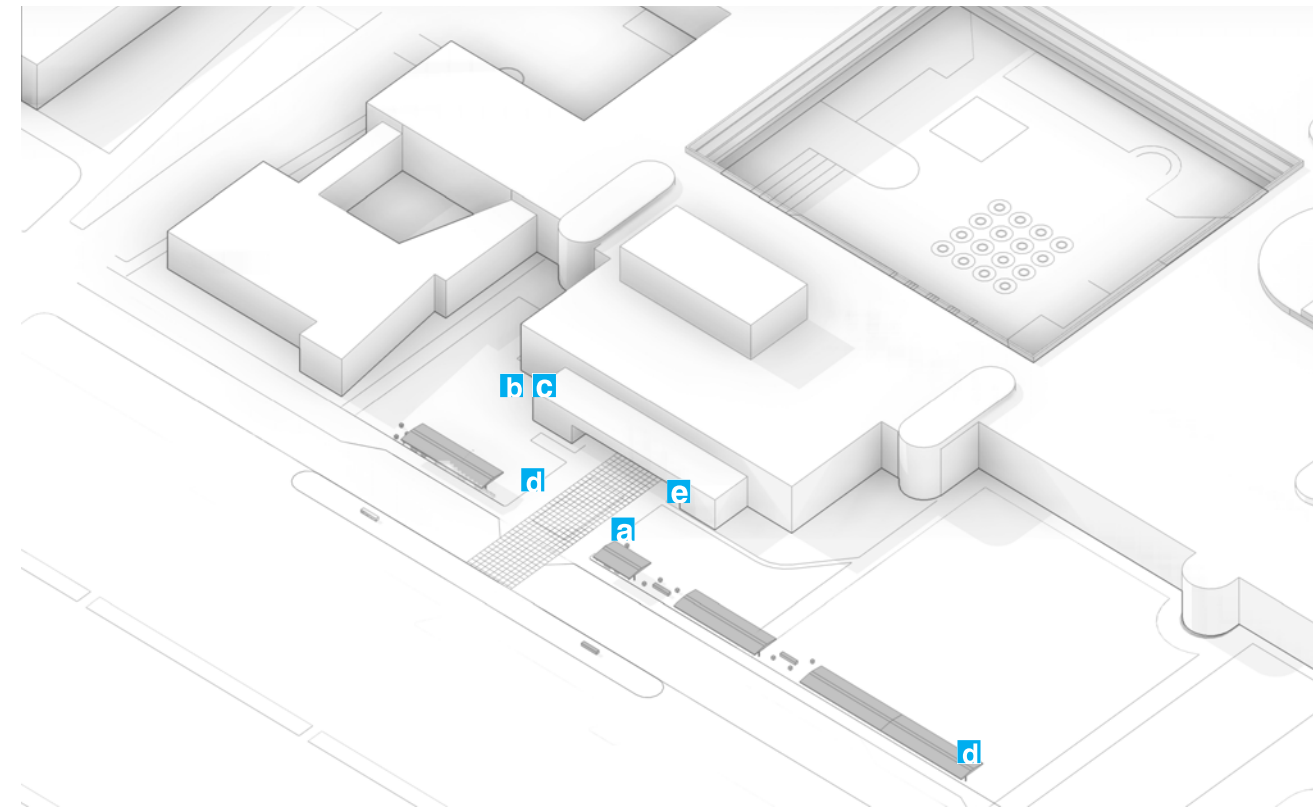
passengers who are not current students. This offers great potential to advertise to them as well.

LBCC's brand can be reflected through the design and construction of the transit hub. As the first point of contact for many people on campus, any wayfinding and signage that it incorporates can influence the rest of the campus. The construction of the collectors themselves could be done with help from LBCC's specialty programs. Metal screens, canopies, signage, and seating could be designed and constructed by the students. This will advertise the technology and craft that is present on the campus.

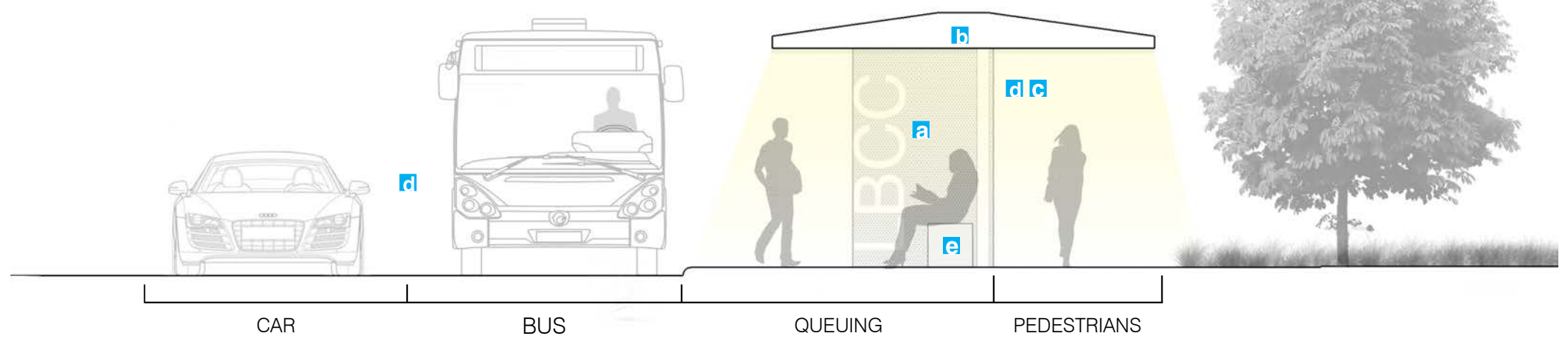
Innovative use of lighting can help capitalize on the incorporated branding opportunities. In addition to helping provide a safe space for transit riders, it can also illuminate signs, structures, and furniture at night.

COLLECTORS

Collectors can serve as a visual cue to identify dedicated waiting spaces and riders support as they wait for their bus. Collectors should be easily recognizable and readily visible to both bus drivers and riders. Drivers need to be able to easily identify where to drop off and pick up riders in an environment where cars and pedestrians are mixing in potentially unsafe conditions.

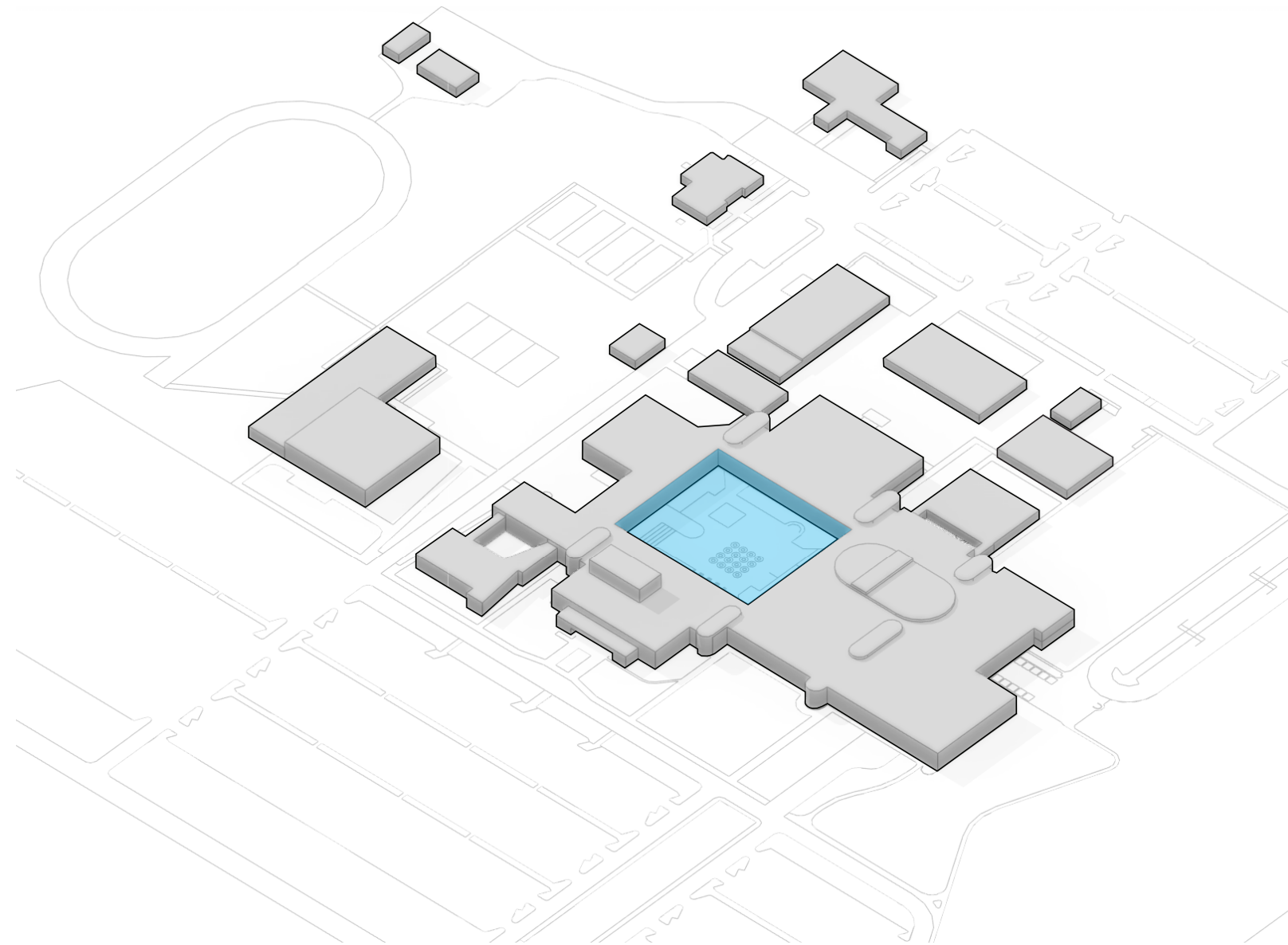


- a** A dedicated waiting space provides an area for transit riders to queue while not interfering with other campus programs
- b** Collectors are easily identifiable and provide seating for waiting passengers
- c** Collectors can also be designed to protect passengers from the elements
- d** Simplifying traffic flow and making riders visible to drivers helps increase overall safety
- e** Seating and collectors can be fabricated by students and act as an advertisement for specialty programs



Top: Diagram of potential transit hub elements
Left: Section through transit hub showing program elements





REDEFINE THE COURTYARD

REDEFINE THE COURTYARD

The courtyard sits at the center of LBCC's Albany campus and provides a prime opportunity to create an active vibrant space at the heart of the campus. While its central location creates many opportunities for interaction between students, the current courtyard design is keeping the courtyard from reaching its full potential.

Accessibility is limited by virtue of the courtyard being sunk into the ground. Human beings are attracted by visual connections to human activity, and as a result they typically shy away from recessed exterior spaces. Not only do recessed spaces create barriers for people with disabilities, they also create a psychological barrier for visitors to the space. Limiting visual connections and recessing the courtyard creates a sense of seclusion and being unsafe.

The courtyard also lacks adequate weather protection to enable it to be used year-round. During the summer the courtyard is subject to direct sunlight, while it is exposed to the rain throughout the winter. This limits the ability of visitors to use the courtyard and creates times when the space will be void of activity.

The current homogeneous furniture with fixed seating creates barriers to visitors creating ownership of their space. People expect to be able to adapt a space to their needs. Providing immobile furniture at a single scale utilizes a "one size fits all" approach and doesn't support current technology and varying modes of work. The current courtyard design is composed of hard, unwelcoming surfaces that create both visual and physical barriers at its edges. With its close proximity to surrounding buildings, the courtyard offers unrealized potential for the buildings, classroom, and office spaces to engage with the exterior space.

LANDSCAPING

With its access to natural sunlight and the elements, LBCC's courtyard offers a prime opportunity to capitalize on the benefits of biophilic design. The presence of plants, organic patterns, textures, and materials elicits a natural connection within people that is referred to as the "biophilic response." This response is intuitive to humans and is important to our physical and mental well being. Biophilic responses help reduce stress, boost energy, enhance concentration, and help people to increase awareness and focus. Since the courtyard is an exterior space, it is natural that it should incorporate design elements that enhance the performance of people that use it.

Adding specific landscape elements will also help soften the courtyard's hard edges. Trees, grass, and indigenous shrubs would serve to contrast the use of concrete and brick. Carefully selected trees and foliage will create a lower canopy and reduce the weight of the space to a human scale.

Landscape elements can also be used to partition the courtyard and act as screening elements and create more intimate spaces. Trees and tall grasses will help cool the courtyard down in the summer by providing shading and evaporative cooling.

WEATHER

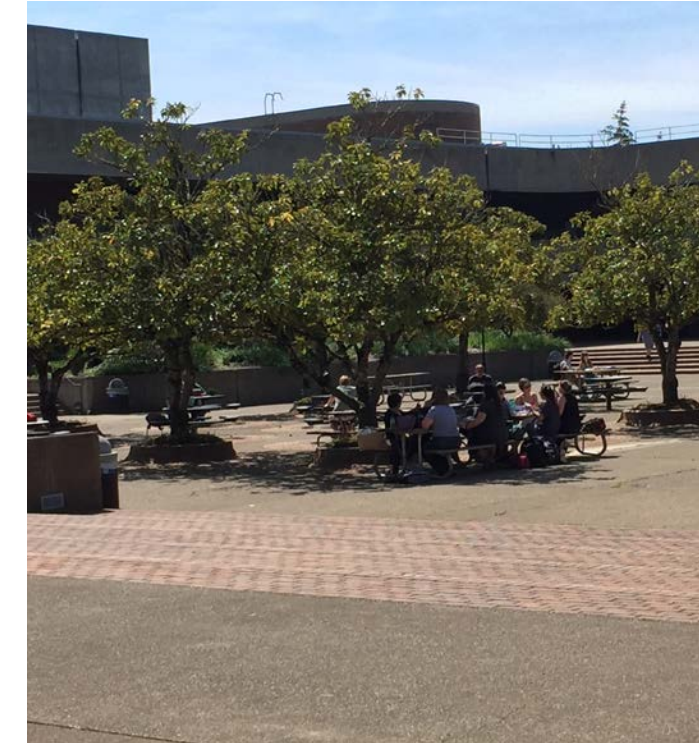
To truly be the heart of the campus, the courtyard needs to be active year-round. To accomplish this, LBCC needs to provide shelter from the elements. During the summer, tensile structures can be drawn strategically across the courtyard to shade occupants from the sun. Thoughtful planning of trees species and locations can create shade for the courtyard. Rain can be mitigated by tree canopy overhangs and structures.



CONNECT EDGES

Improving the physical and visual connections between the courtyard and surrounding buildings will help create activity and energy within the space. Allowing physical connections between buildings and the courtyard allow interior spaces to be expanded to the exterior. Classrooms or offices could utilize folding or sliding doors to allow classes to flow out into the space. Providing physical access between the offices and administration spaces will allow employees to move outside to work, conduct meetings, or take a break.

Visual connections to the courtyard are just as important as physical ones. Allowing students and employees sight-lines to plants, daylight, and external activity is stimulating



and will elicit a natural biophilic response. Studies show that students and workers with direct access to daylight and natural views are more engaged in their work and lessons, have more energy, are healthier, and take less sick days.

DIVERSITY OF SPACE AND SCALE

Successful public spaces provide a diversity of space options for visitors to utilize. The conditions under which people will utilize the courtyard vary widely, and the design of the courtyard needs to reflect that. Providing opportunities for large groups to congregate in the courtyard is important, as is providing adequate support for small groups within the space. This is accomplished through thoughtful use of furnishings

[Above: Photographs of existing conditions](#)



and the creating of spaces. Large immobile pieces of furniture can support functions for large groups that are visible from all points in the courtyard. Allowing large groups space to work in while putting them on display adds to the energy and vibrancy for the space.

Providing opportunities for smaller groups to claim ownership over a space can be provided by smaller seating groups. Mobility and modularity in furniture will enable small groups to set up a work space as they require and allow them to scale as needed. Tables of 2-4 can be pulled together to accommodate groups of 6-8. Movable furniture creates a sense of empowerment and comfort.

While creating a space that stimulates energy and vibrancy is important to an active courtyard, it also needs to provide quieter more intimate spaces for people that need it. Landscaping and furniture can be used to create smaller, more secluded areas where single users or small groups can work in a quieter atmosphere.

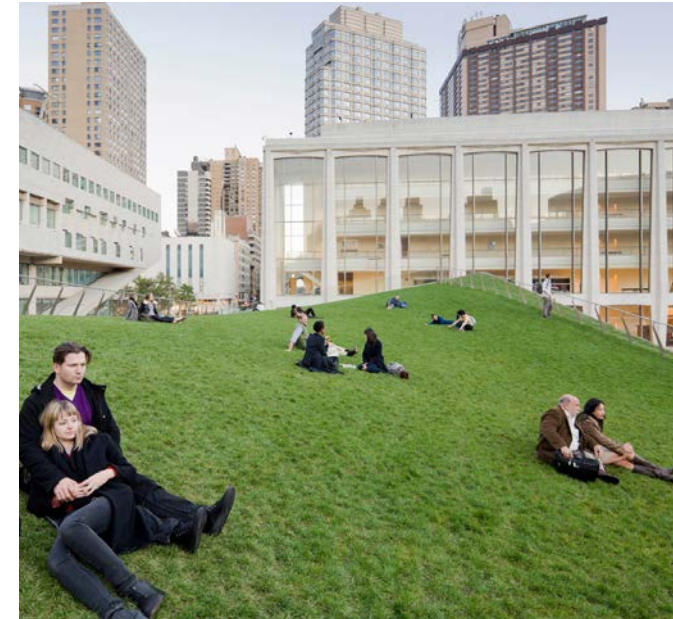
LIGHTING AND SECURITY

Fostering a strong sense of safety is a key component to creating a successful public space. People need to feel that their person and property are safe if they are going to feel empowered to use the space. This is accomplished through visual oversight to the courtyard. Increasing visibility to the area not only allows the campus to capitalize on the sense of energy and community, but it also allows more people to observe courtyard visitors. More observers means more eyes on the space to hold people accountable.

This approach needs to expand to include low-light and late hours. People occupy the campus at all hours of the day, so providing quality lighting will help make the courtyard safer for people passing through it in the evening.

ACCESSIBILITY

Enhancing accessibility to the courtyard is imperative to making it an active center. All approaches to the courtyard must be fully accessible by anyone, regardless of physical limitations. Barriers to entry and movement through the space can be accomplished by raising it to be at consistent grade, similar to the first finish floor of campus facilities. This would remove any psychological barriers to being in a sunken courtyard and allow access by all people. The more people that are in the courtyard, the more active it will be.



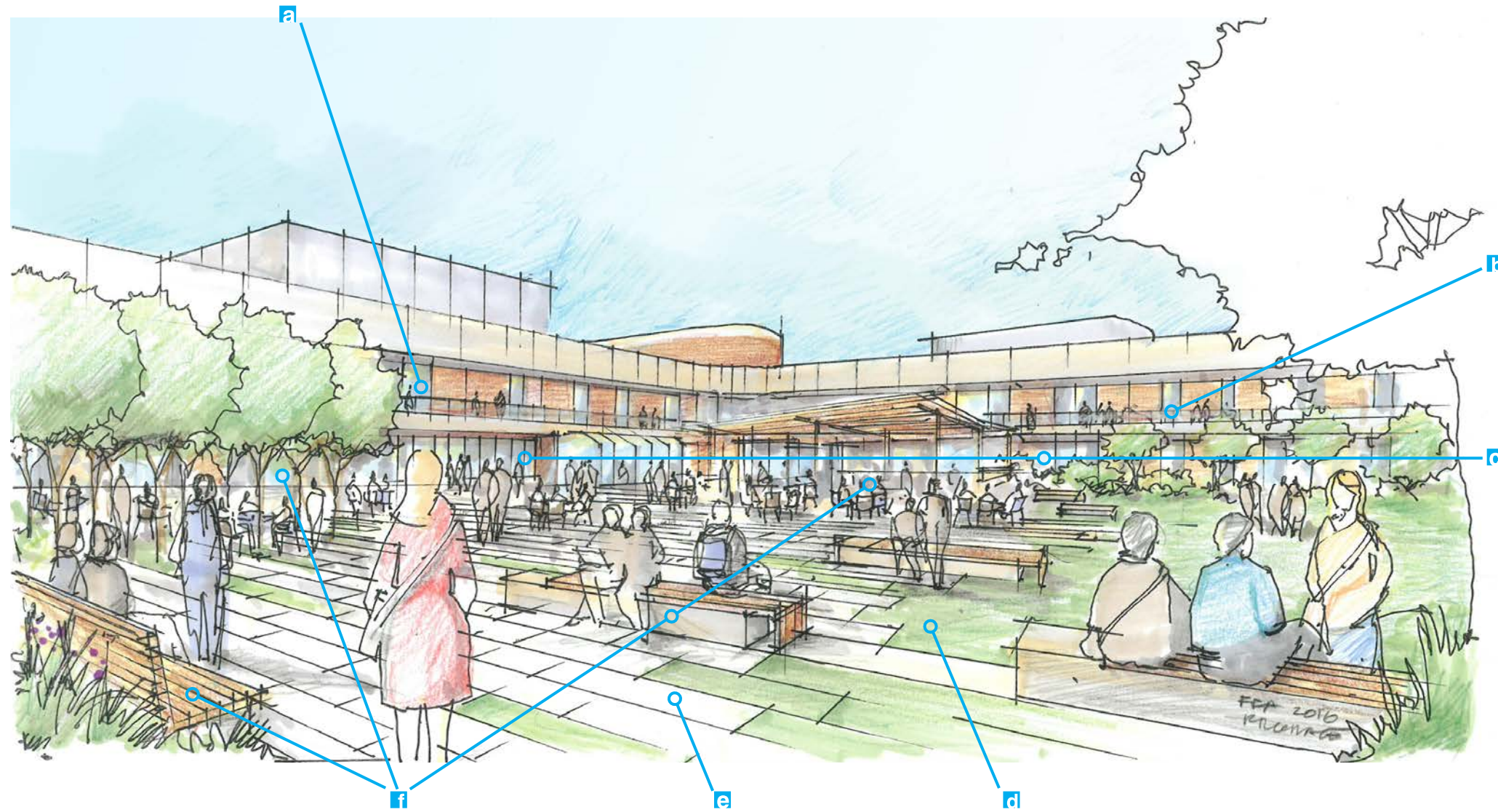
Left: Inspirational photograph of accessibility in the courtyard
Top Middle: Inspirational photograph of raising the grade
Bottom Middle: Inspirational photograph of integrated landscaping
Top Right: Inspirational photograph of connecting the building to the courtyard
Bottom Right: Inspirational photograph of diversity and scale of space



- a** Raising the courtyard to a consistent grade will make it accessible to all people
- b** Landscape elements can delineate space and be used to create a biophilic response
- c** Softening the edges of the courtyard will allow the surrounding spaces to more easily access the courtyard
- d** A wide range of seating options will support numerous postures and modes of work
- e** Appropriate lighting and visual connections to the courtyard will enhance the security of the space
- f** Portions of the courtyard must be protected from the elements to promote year-round use

Left: Diagram of potential courtyard design



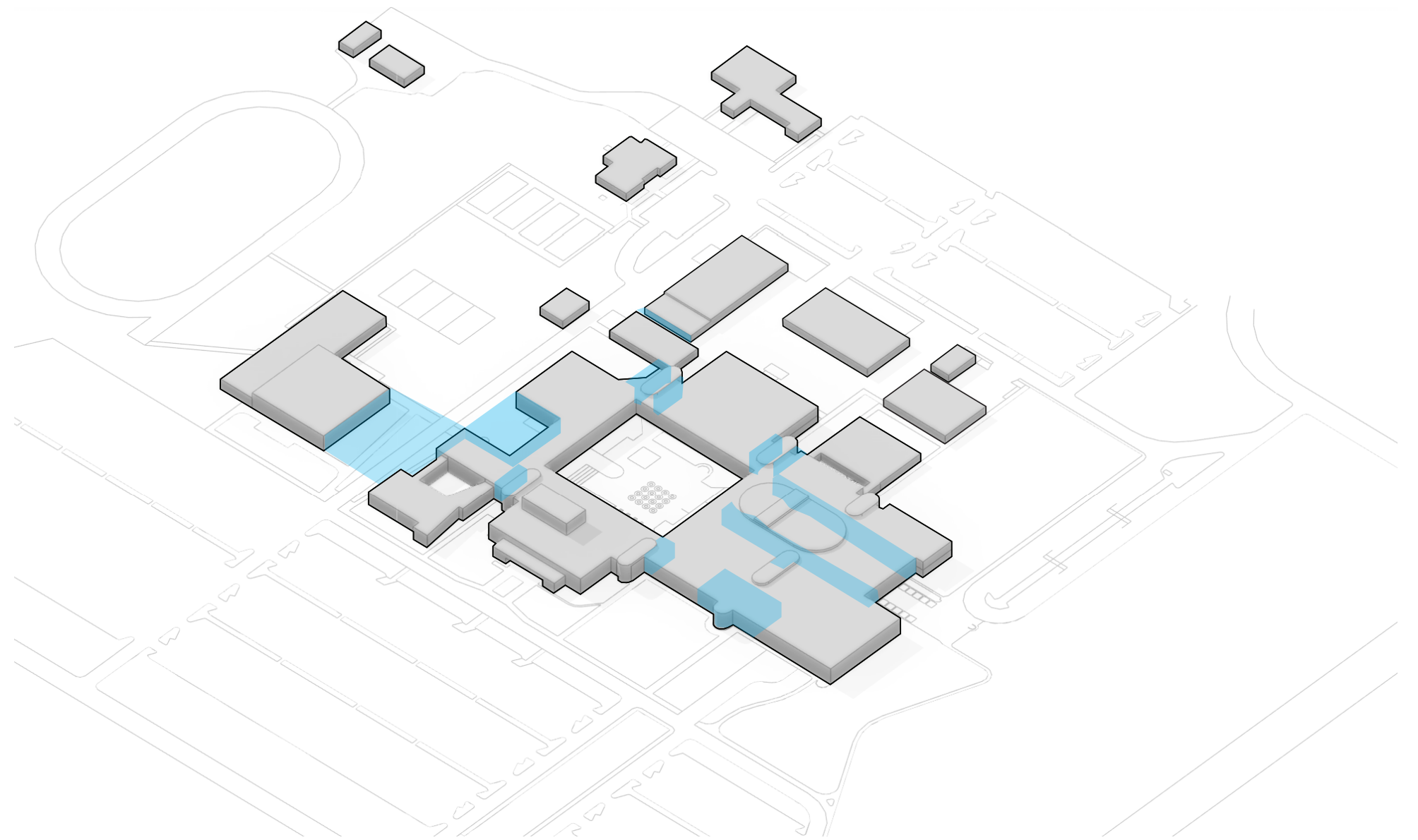


- a** Increase glazing and transparency
- b** Reduce amount of concrete for transparency and connectivity
- c** Improve physical and visual connections to courtyard
- d** Reduce concrete hardscape and soften the courtyard edges
- e** Raise courtyard elevation for universal accessibility
- f** Create a variety of scales and options for informal gathering



Above: Photograph of existing condition and inspiration sketch of the courtyard





CREATE IN-BETWEEN SPACES

STRENGTHEN IN-BETWEEN SPACES

The existing layout for LBCC's Albany campus offers many opportunities to capitalize on programming "in-between" spaces. The campus is currently composed of over 15 buildings, nearly one third of which are connected by a single large canopy. The current building construction is of monolithic concrete, and the resulting spaces that are created between these buildings are utilized for circulation and little else.

The canopy itself is used to provide circulation between various buildings on the south edge of campus. While the canopy offers protection from the weather, it is also an obstacle to creating occupiable spaces. Natural light is nearly entirely blocked by the canopy, creating dark cavernous spaces beneath. The proportions and materiality of the canopy make it feel incredibly heavy and dominating to the human scale.

Despite the lack of daylight and the hard imposing forms of the buildings themselves, there are many opportunities to address the in-between spaces on the Albany campus.

DAYLIGHT

The benefits of properly daylighting spaces are well documented. Students that learn in an environment that takes advantage of natural light are more engaged, productive, and healthy. Daylighting boosts their learning and battles myopia. Likewise, employees that work in an environment that takes advantage of natural light are more engaged, productive, and healthy.

With the presence of tall imposing buildings on campus providing access to daylight is a priority, especially beneath the canopy. Selectively penetrating the canopy and walkways beneath with light portals would help light the dark cavernous spaces beneath. Light portals would also provide views to the sky, allowing the covered spaces to retain a connection to nature. Students and faculty would then be able to feel like they are outside while still being sheltered from the elements.

SAFETY

Fostering a strong sense of safety is a key component to creating successful in-between spaces. People need to feel that their person and property are safe if they are going to feel empowered to use the space. This is accomplished through visual oversight to the spaces and appropriate lighting. Increasing visibility to the in-between spaces not only allows the campus to capitalize on the sense of energy and community, but it also allows more people to observe the occurrence of spontaneous interactions. More observers means more eyes on the space to hold people accountable.

This approach needs to expand to include low-light and late hours. People occupy the campus at all hours of the day, so providing quality lighting will help make the in-between spaces safer to occupy. With better lighting people will be more likely to stay on campus later, increasing its activity and sense of community.



SPONTANEOUS INTERACTION

As large groups of people move through the campus between classes, a prime opportunity to design in-between spaces that promote spontaneous interaction is presented. These types of interactions are an invaluable asset to organizational cultures. The ability for conversations between peers to occur through happenstance fosters a connection to the greater whole and is a highly effective means of sharing information.

For spontaneous interactions to occur on a regular basis, spaces need to be designed to support them. Key areas for interactions need to be identified, and spaces supporting conversation need to be readily available to people as they move through the space. Visual access over the site is also important. People need to be able to see and be seen for connections to be made. The scale of spaces to support spontaneous interaction should vary from spaces for two people to meet, to spaces for a small group to gather. The spaces should be comfortable and protected from the elements.



CONNECTIVITY

Enhancing connections to the surrounding buildings on campus can help activate in-between spaces. Finding synergies between building programs and exterior spaces offer opportunities to extend interior spaces to the exterior. For example, the cafeteria can be opened at the perimeter of the building to allow cafeteria seating to extend to the exterior. The library can open up to allow for interior/ exterior public spaces. Enclosed glazed spaces can be added for office use to increase square footage and allow interior spaces to connect to the exterior while still offering weather protection.

Adding windows and penetrations to allow building access to in-between spaces helps to soften the edges of the buildings. Perforating building walls and adding glazing creates opportunities for visual connections between interior and exterior spaces and helps reduce the perception of building mass. Solid walls become transparent, adding to the visual security of the in-between spaces.

Above: Photographs of existing conditions



WAYFINDING

People should be able to quickly orient themselves and clearly identify destinations and points of circulation. This is accomplished through different means of wayfinding. One such tool for wayfinding is signage. Signage should be clear, legible, and consistent throughout LBCC's campuses. This will not only reinforce LBCC's brand, but clarify how people should move through the campuses.

Signage and means of wayfinding can be designed, fabricated, and constructed from LBCC's unique programs. These wayfinding opportunities can also serve as advertisements for LBCC's special programs. The talents and knowledge of the college's drafters, CNC routers, and welders can be leveraged to help design, construct, and install elements that will not only reflect LBCC's brand, but also showcase their acquired talents.

CHOICE IN POSTURE

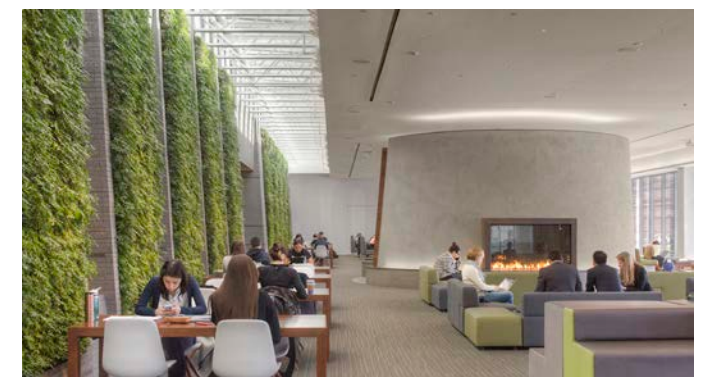
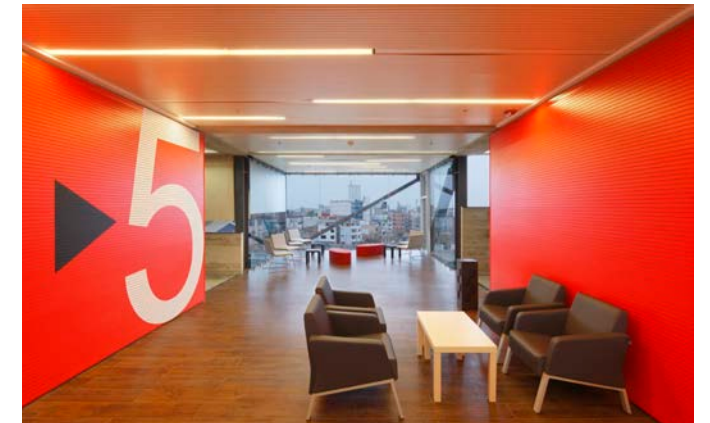
Spaces that allow for spontaneous interaction need to be supported with a variety of furniture. Often times when striking up a conversation with a peer, the need to share information arises. Furniture can help facilitate this by offering "landing pads" for people to gather around and utilize technology. Tables with charging stations can allow people to pull a laptop or a phone to speak to a specific project or website. Short conversations can be serviced by providing places for people to stand and converse, while seating is optimal for conversations that are being longer. Benches, tables with movable chairs, and landscape elements that double as furniture can support these interactions.

IMPRINTING

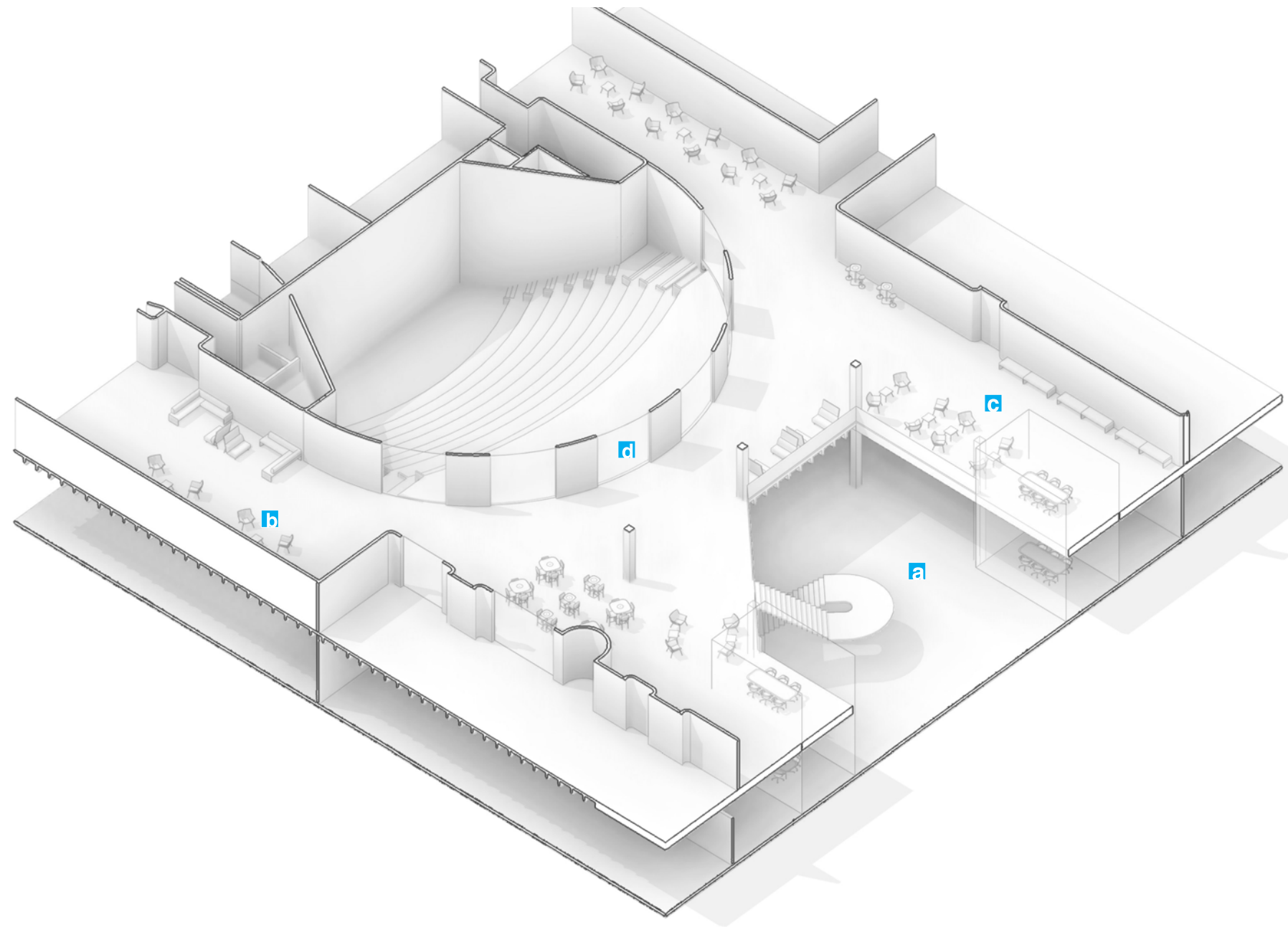
Imprinting can help soften the hard edges of the architectural character, while amplifying the sense of community and brand. Providing space for diversity and

cultural expression will allow students to explore their identity within the college and put it on display.

Imprinting can be accomplished through inviting the student body to have a voice in how their campus be branded through art contests, guest artists, and voting for installations.



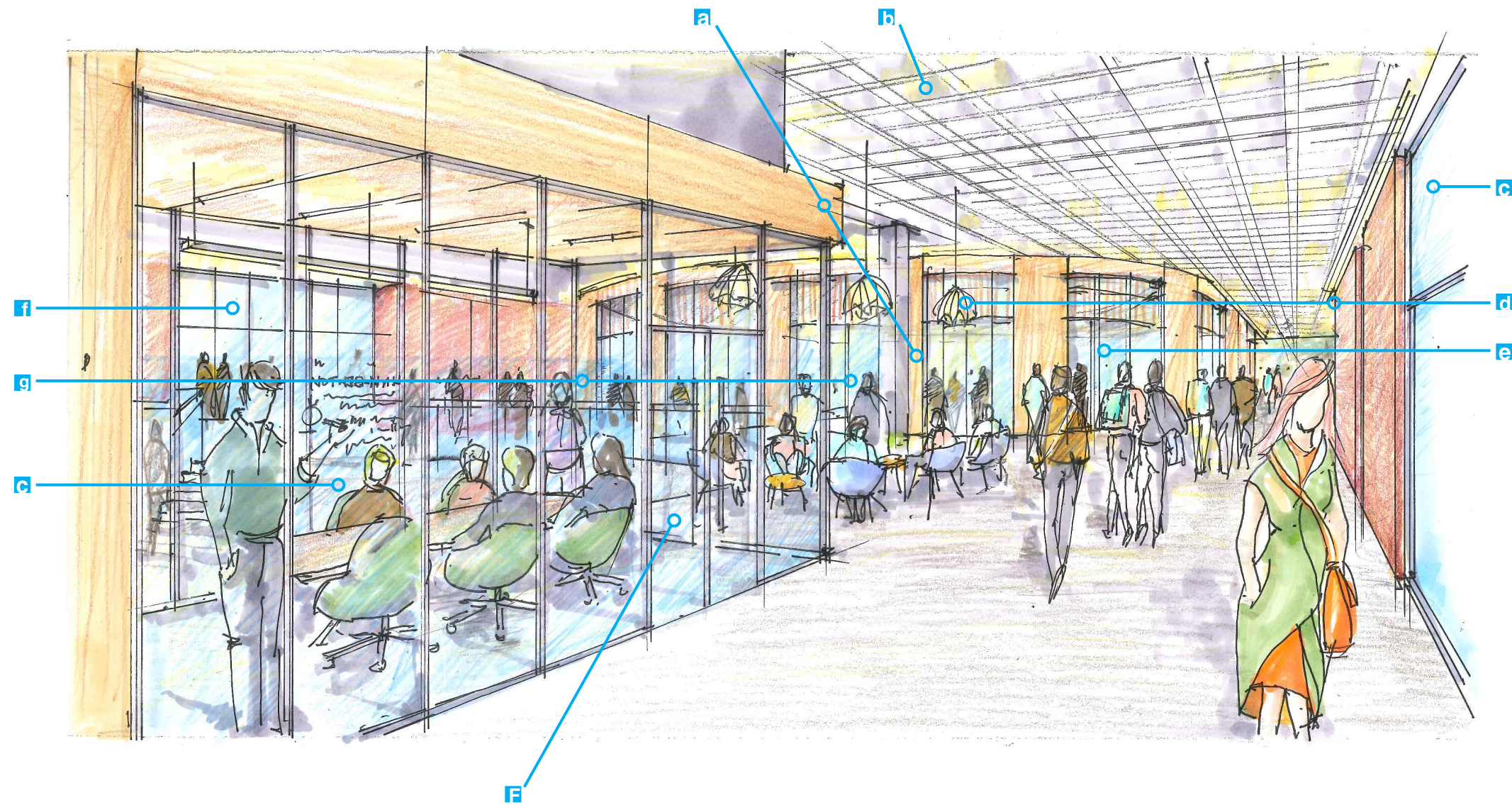
Left: Inspirational photograph of daylighting
Top Middle: Inspirational photograph of imprinting
Middle: Inspirational photograph of safety
Bottom Middle: Inspirational photograph of choice in posture
Top Right: Inspirational photograph of wayfinding
Middle Right: Inspirational photograph of connectivity
Bottom Right: Inspirational photograph of spontaneous interaction



- a** *Natural light from solar tubes and windows contribute to employee happiness and productivity*
- b** *Offering choices of posture fosters employee engagement and increases overall wellness*
- c** *Designing active zones will increase the chances of spontaneous interaction*
- d** *Adding glazing to perimeter walls reduces the sense of mass and creates visual connections to the building*

Left: Diagram of in-between spaces



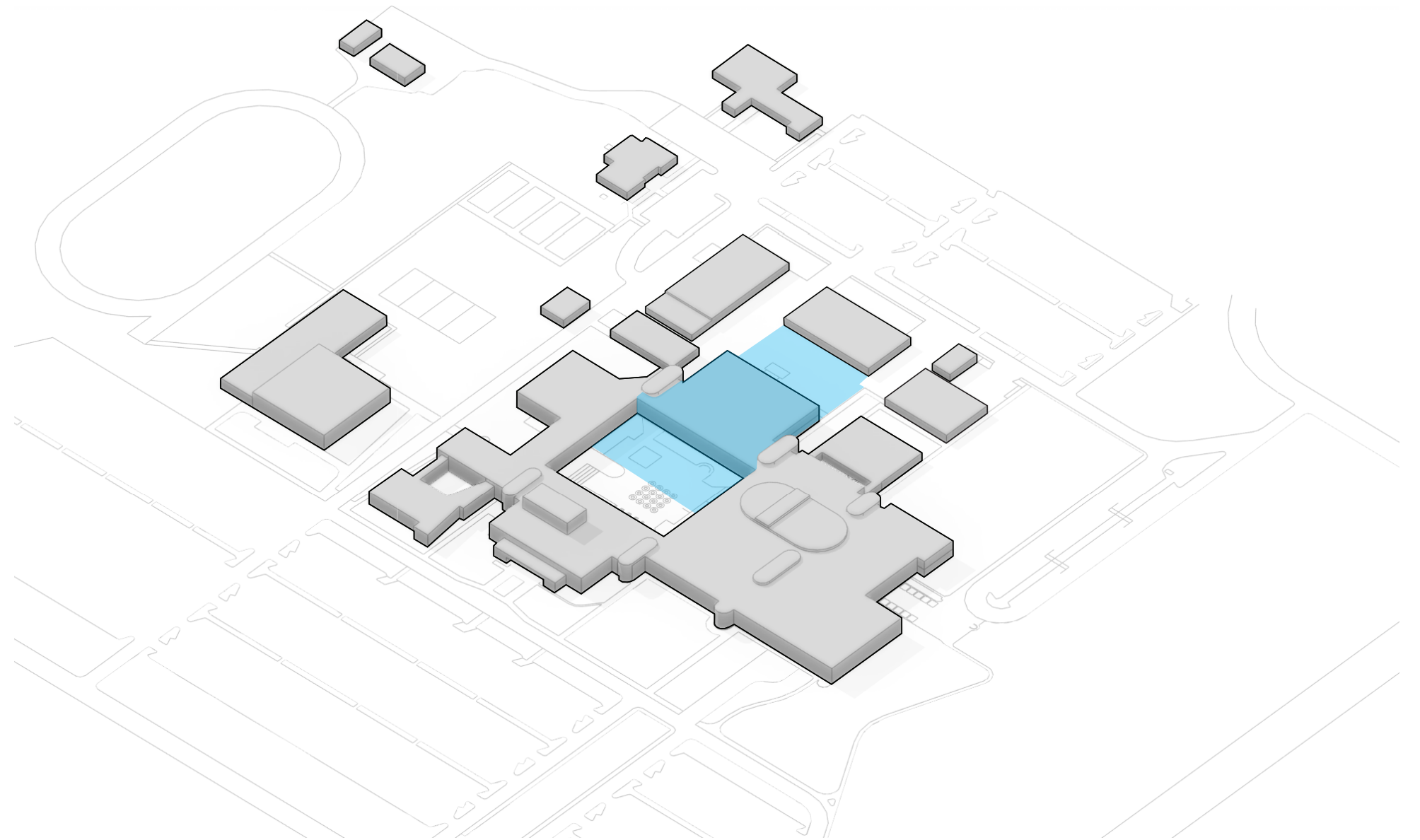


- a** Balance existing concrete and masonry with warm natural materials
- b** Increase access to daylight area to bring warmth and visual clarity
- c** Maximize transparency and minimize opaque massive walls
- d** Provide appropriate ambient and task lighting
- e** Promote physical, visual, and operational connectivity
- f** Variety of informal learning spaces
- g** Balance openness and transparency with safety screening



Above: Photograph of existing condition and inspirational sketch of in-between spaces





SHOWCASE UNIQUE PROGRAMS

SHOWCASE UNIQUE PROGRAMS

LBCC provides many specialized programs that make it unique among community colleges in Oregon. Drafting, CNC routing, welding, and other tech programs provide a quality life-changing education to students that they cannot get anywhere else. By taking a few simple steps, LBCC can capitalize on the success of their technical programs by putting them on display as an advertisement for the college's programs.

The current placement of maker spaces on the north side of campus relegates them to the "back of house." The majority of classes and activities happen from the courtyard and south. As a result, traditional students and faculty do not get an opportunity to interact with these maker programs.

The spaces themselves don't do a good job of creating an inspirational, engaging learning environment. The buildings are dark, with little access to daylight or views to the exterior. The areas surrounding the learning spaces are dedicated to service functions such as loading, parking, and materials storage.

The maker programs at LBCC are a large part of its identity and brand. The current placement and spaces for these programs represent a large missed opportunity to advertise for LBCC and reflect its values.

CONNECTIVITY AND VISIBILITY

Improving the physical and visual connections between the tech programs and the surrounding campus will foster engagement with students and faculty on campus.

By putting technical programs on visual display, prospective students will have the opportunity to connect with these programs, even though they are not a part of them. This can stimulate interest and intrigue, drawing students to the courses and increasing the knowledge of their existence on campus. The unique programs will benefit from an increased awareness of their presence. External students, employees, and faculty members will be more likely to engage them for their expertise. Additionally, word of mouth will help spread information about them beyond the immediate campus.

DAYLIGHTING

The current maker spaces on Albany's campus exist in large impenetrable buildings, and the result is that the spaces are not welcoming or inspirational.

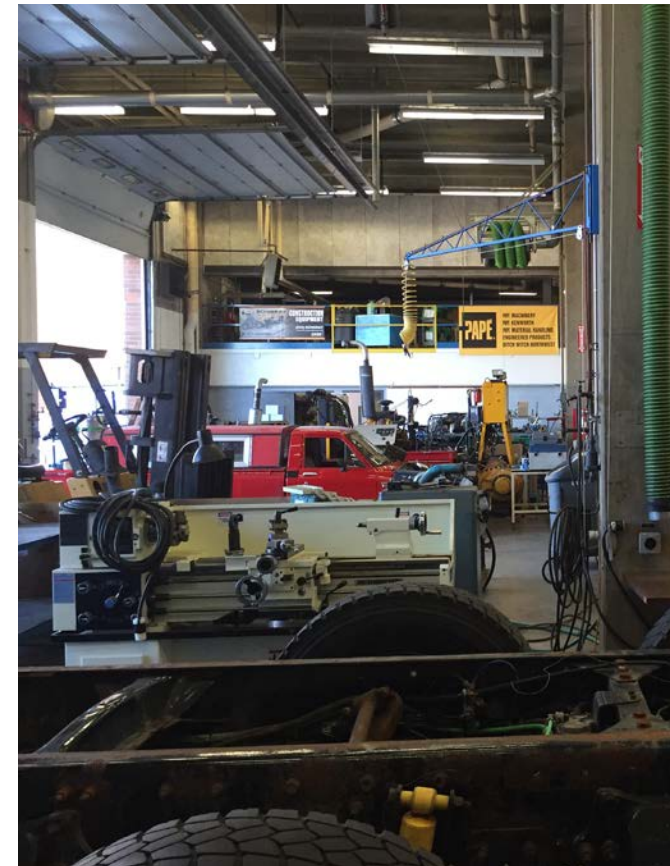
Filling the spaces with daylight through the addition of windows, skylights, or solar-tubes will help transform the spaces from dark and cavernous to bright and welcoming. Creating a welcoming space will have a net-positive effect on the students who spend long hours in the shops and create a more appealing space for prospective students.

BRAND

Technical programs are a large part of the college's identity. Whether it be the tech spaces in Albany, the ceramics program in Benton Center, or the Advanced Transportation Technology center in Sweet Home, these hands-on programs very much speak to LBCC's brand. As discussed previously, these programs can and should be

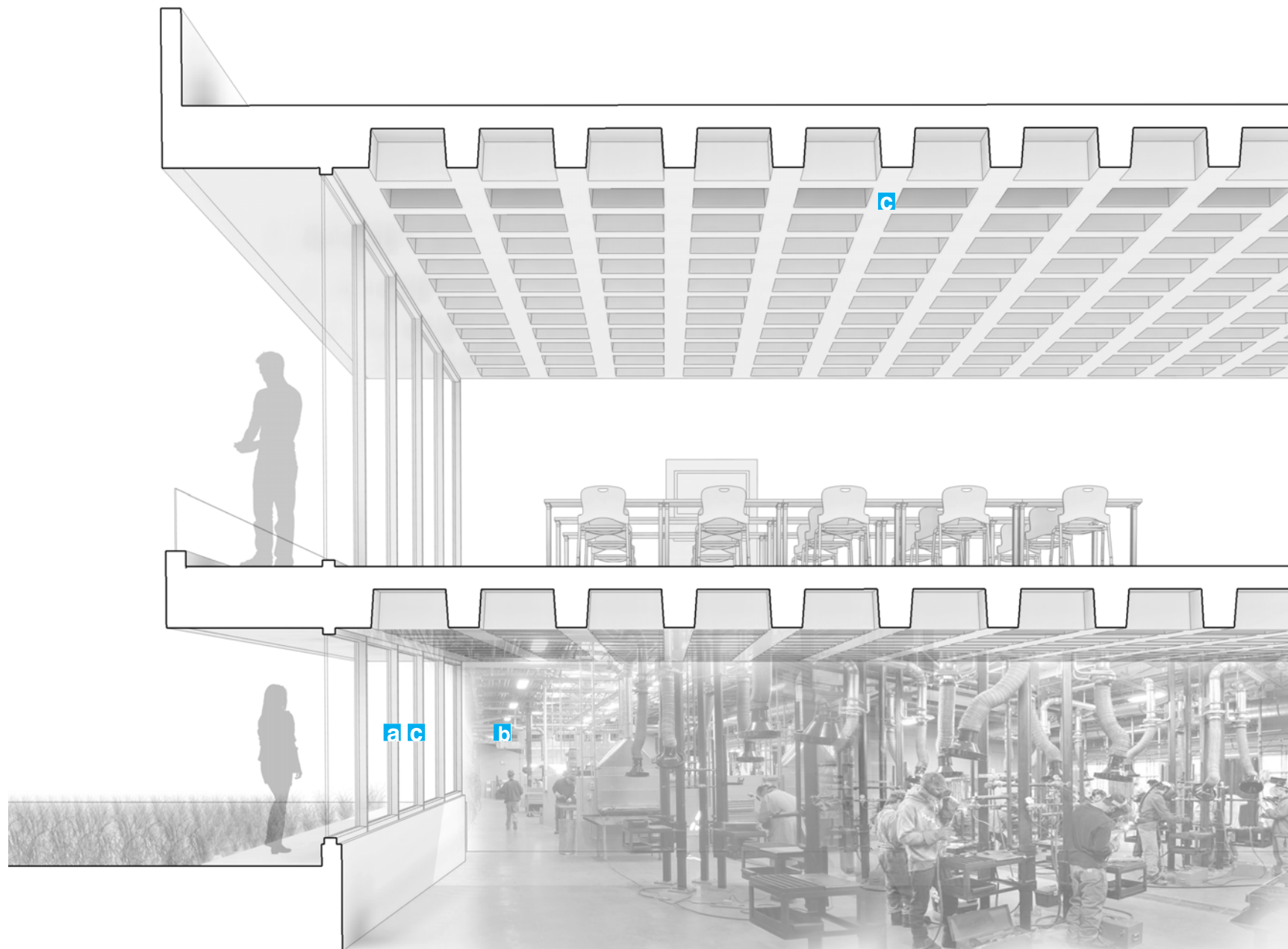
be integrated around the campus.

Constructed elements such as screens and site furniture can be designed and constructed by the AutoCAD, CNC routing, and welding programs. These programs can be used to design and construct site walls, site lighting, signage, hand-railings, bike-racks, and other required furnishings. Leveraging the unique talents of the students and faculty to design and create these elements will help create a consistent language for the campus. It also reinforces the brand by creating a compelling story about who LBCC is and their core values.



Left: Photographs of existing conditions
Above: Inspirational photographs of successful program spaces

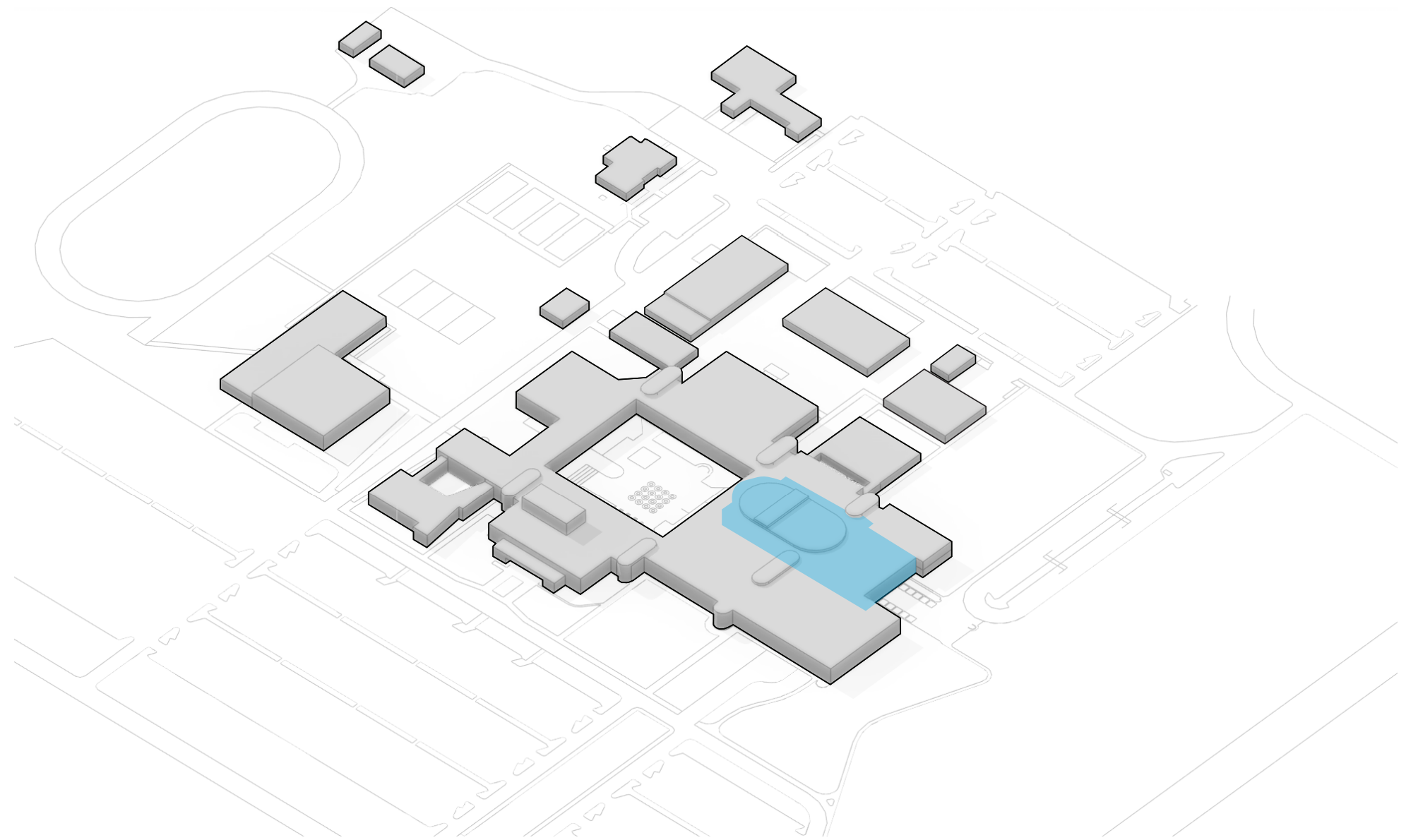




- a** *Creating a visual connection between the classroom creates a display out of LBCC's unique programs*
- b** *The maker culture reflects the brand of LBCC*
- c** *Natural light from solar tubes and windows contribute to student engagement and performance*

Left: Diagram of campus solution





TRANSFORM THE FORUM

TRANSFORM THE FORUM

The Forum occupies a unique spot on LBCC's Albany campus and offers the opportunity to create a truly transformative space. Located on the east side of campus, the Forum is the first thing that visitors see when using the underutilized, yet symbolically important ceremonial campus entry. It is also located immediately next to the central courtyard and cafeteria. As a result, the Forum is a very important building on campus that needs to be addressed.

The Forum is currently constructed of brick and concrete. Like other buildings on campus it is heavy, hard, dark, and unwelcoming. Though the area around it is open, light fails to penetrate the Forum and glare from artificial lighting is prominent. In addition to being dark and foreboding, the Forum is constructed of entirely opaque materials. Despite the fact that the Forum is located directly between the courtyard and ceremonial entry, visibility to and from these prominent areas is nearly entirely obstructed by the Forum. This misses an incredible opportunity to visually connect two extremely important spaces on campus.

Despite its prominent position on campus, the Forum is underutilized. With its central location and unique layout, the Forum has great potential to be transformed into the heart of the campus.

DAYLIGHT

The benefits of properly daylighting spaces are well documented. Students that learn in an environment that takes advantage of natural light are more engaged, productive, and healthy. Daylighting boosts their learning. Likewise, employees that work in an environment that takes advantage of natural light are more engaged, productive, and healthy.

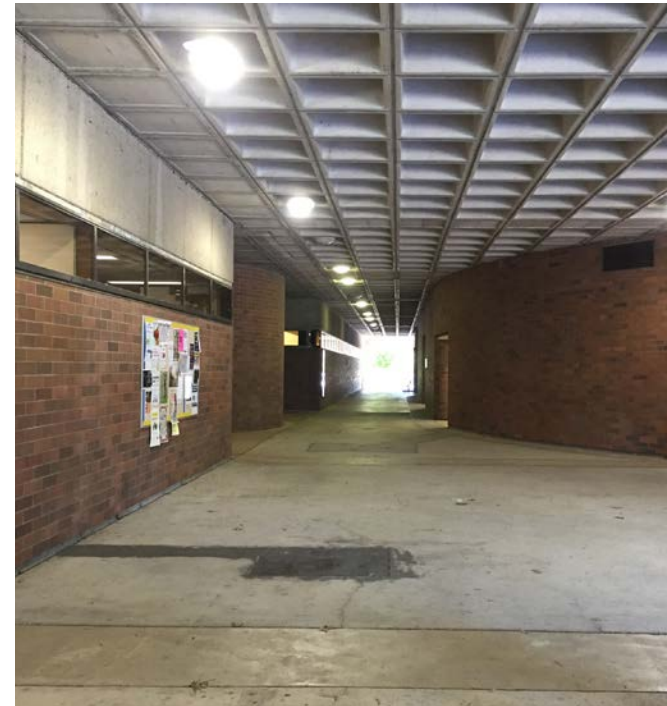
With the presence of tall imposing buildings, providing access to daylight to the exterior spaces is a priority, especially beneath the existing waffle slab canopy. The Forum is especially deep compared to some of the other buildings on campus, and the open nature of the walkways that surround it create exceptionally bad instances of glare. Students and employees walking through the space have painful transitions from dark spaces to natural light.

Selectively penetrating the canopy and walkways beneath with light portals will help light the dark, cavernous spaces. Light portals will also provide views to the sky, allowing the covered spaces to retain a connection to nature. Internally, skylights and light shelves can be used to light the assembly space.

COMMUNITY

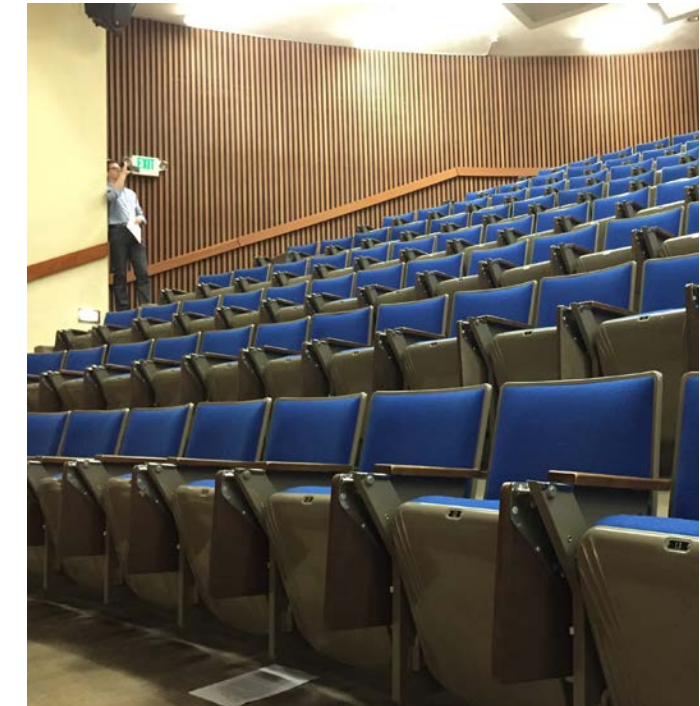
Creating a sense of community is important for learning institutions, but it can be a challenge to foster for commuter-dominated campuses such as LBCC's Albany campus. Organizations that have a strong sense of community benefit from greater engagement from their members. People are less likely to leave an organization where they feel they are part of a community, and they'll contribute more time and energy into their keeping it vibrant and successful.

The Forum can act as an important symbol of community within the campus. Making it a building that is open to all



students, and empowering them to use it, will allow them to feel an ownership of the space. It will become a space that is dedicated to supporting them and their peers. The Forum will become a place to not only do their work, but to meet other students and faculty, relax with friends, or simply spend time between classes.

In addition to being a tool that is integral to the success of students and faculty at LBCC, the Forum can also become a place for the whole campus to gather for functions. In addition, large lectures and performances can take place periodically. Any large meetings required to communicate with students could occur in the Forum, either live or through the use of technology. Important news and information could be regularly displayed there. The Forum can become a place that people seek out to connect with the larger LBCC community.



CONNECTIVITY

As large groups of people move through the campus between classes there is a prime opportunity to design in-between spaces that promote spontaneous interaction. These interactions are an invaluable asset to organizational cultures. The ability for conversations between peers to occur through happenstance fosters a connection to the greater whole and is a highly effective means of sharing information. With its central location, the Forum offers a prime opportunity to create a campus-wide connectivity hub.

Creating active spaces is key to promoting a vital academic environment. Active spaces create compelling reasons for people to congregate in an area. Creating a space that is unique on campus is one way to attract

Above: Photographs of existing conditions



people to the Forum. With its size, location, and unique volume, the Forum can offer a unique user experience. The volume can be programmed so that many smaller uses can occur simultaneously in the space. Large groups can gather, while small groups or single users can stake out their own corner to do their work.

Programming the Forum to be accessible to all students throughout the day will help encourage its use. While allowing larger functions to take over parts of the Forum occasionally, dedicating the majority of the Forum to be used by anybody on a reliable basis is important. Doing so positions the Forum as a tool that can be leveraged by all students and faculty. If they know they can reliably drop in at any time, it will become a regular tool in their regular activities on campus. The more people who habitually use the space, the more active it is, and the more people it attracts.

FLEXIBILITY

For the Forum to successfully fill the role of becoming the vibrant heart of campus, the space will need to be incredibly flexible. It will have to support small groups, large groups, and possibly campus-wide functions. This can be accomplished through careful programming and design.

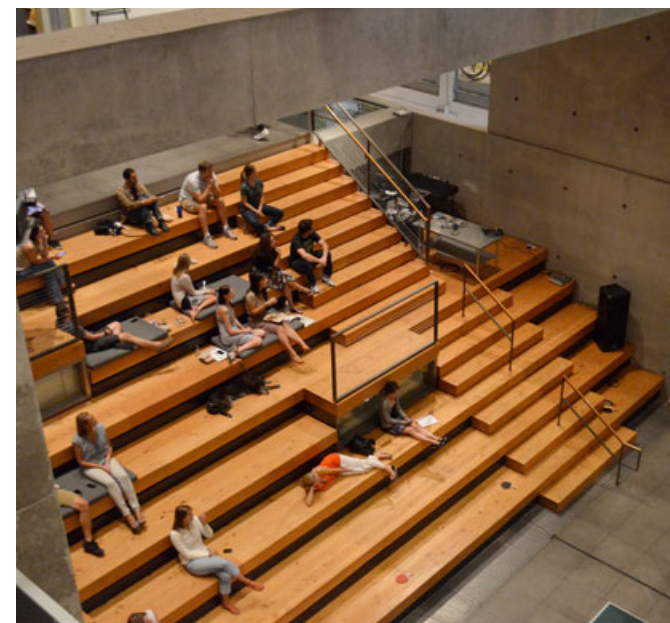
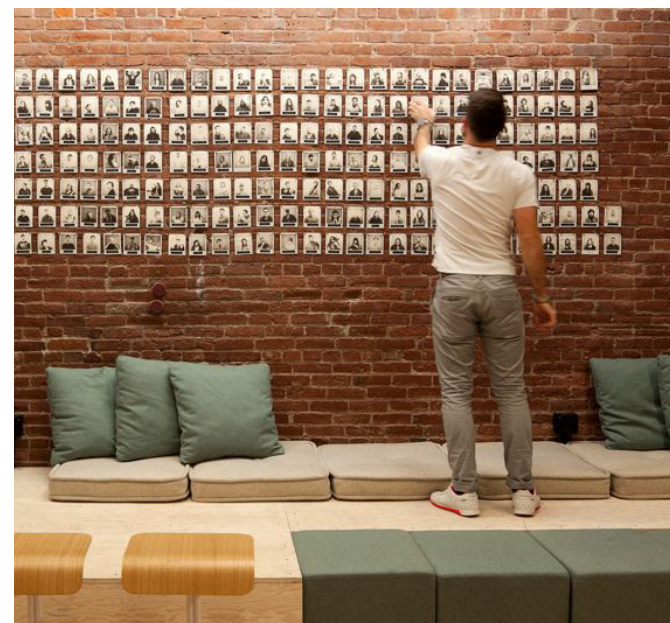
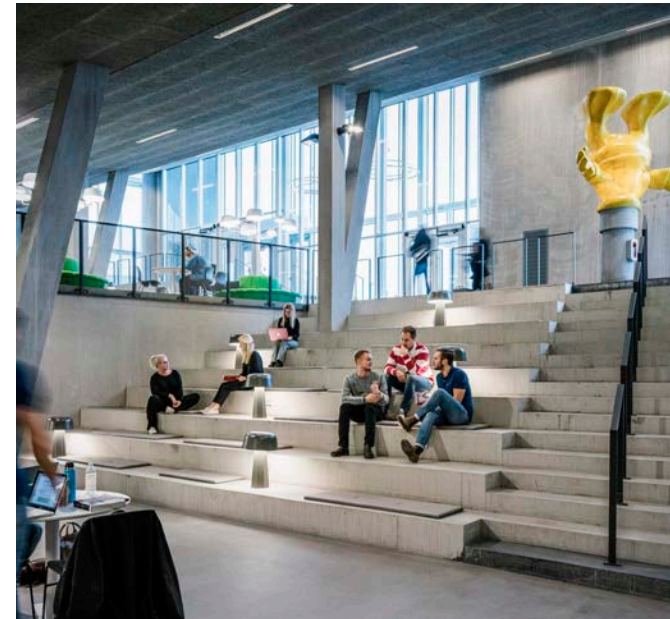
LBCC can capitalize on the unique bowl shape of the forum to create an engaging assembly space. The bleachers and steps can be wrapped in a material such as wood to create a sense of warmth, transforming the bowl into tiered seating. Groups of all sizes would be able to use this seating system and still be able to see the entire space. A wide array of furniture assemblies of all different sizes can be programmed in the space for people to use. Flexible seating spaces, small nooks that allow varying degrees of privacy, and large built-in furniture pieces that anyone can use will help activate the space.

The bowl could utilize sliding partitions to break the large volumes down into smaller spaces to be used by medium-sized groups. If larger assemblies are needed, the perimeter for the Forum could be penetrated with sliding walls that allow the bowls and internal spaces to open up to the exterior, allowing the assembly space to extend beyond the forum.

VISIBILITY

Embracing visibility is critical to the successful transformation of the Forum into the heart of campus. The forum is currently opaque construction which inhibits its ability to showcase its program and create an active space.

People gather in public spaces to see and be seen. The ability to work while having visual access to a space filled with other people fosters a sense of community and

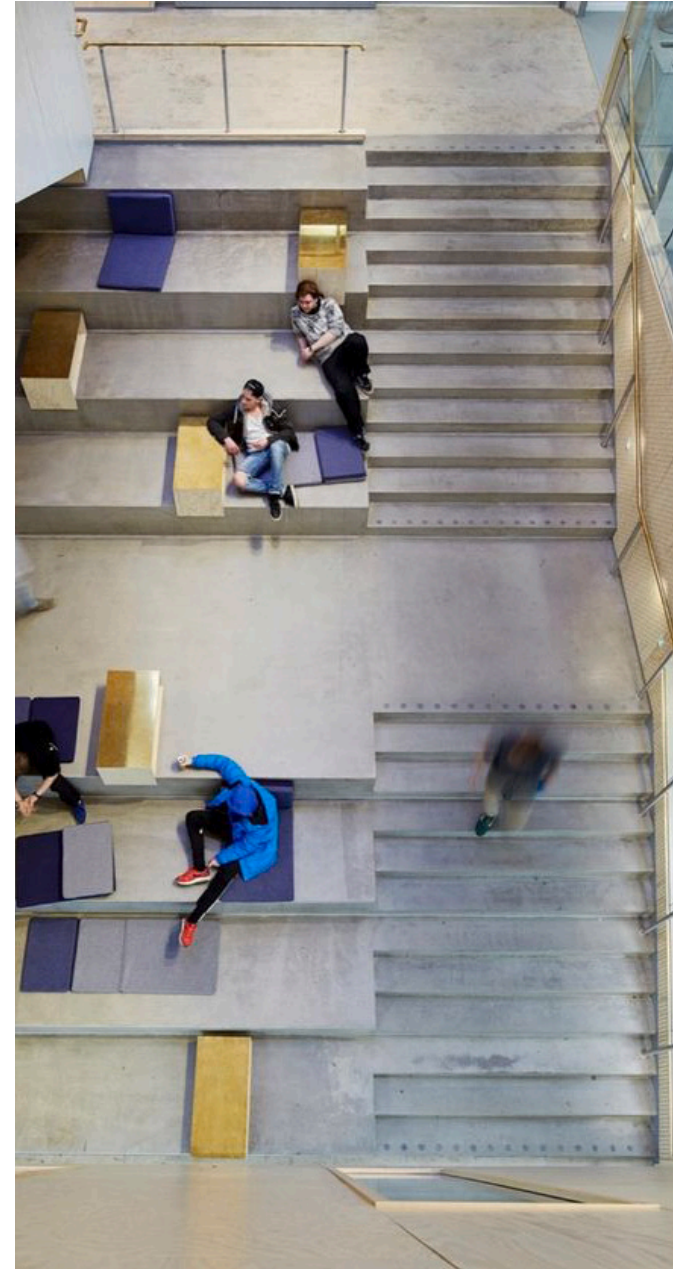


Bottom Left: Inspirational photograph of community
 Top Middle: Inspirational photograph of flexibility
 Bottom Middle: Inspirational photograph of visibility
 Right: Inspirational photograph of choice in posture

belonging. Creating a space that allows people to observe others creates natural connections between the people in the space and allows them to feed off of the communal energy. This creates a positive environment that people are more likely to revisit.

The positive effects of people watching aren't limited to people sitting within the space. Creating transparency at the Forum perimeter that allows the observation of people moving past the building allows them to contribute to the overall energy and atmosphere of the Forum. Putting people, energy, and movement on display will help activate the space.

Adding transparency at the perimeter of the Forum will advertise the internal programming to the exterior. People arriving on campus, or walking by to class will be able to see an active live space and will be more likely to see it out in the future for themselves. The transparency will also contribute to the overall site lines on campus. Creating selective view corridors through the space will allow people arriving on campus to see through the Forum and into the campus courtyard, drawing them into the campus.



Left: Inspirational photographs of daylight and nature
Middle: Inspirational photograph of community
Top Right: Inspirational photograph of flexibility
Bottom Right: Inspirational photograph of connectivity





- a** Balance existing concrete and masonry with warm natural materials
- b** Provide opportunities for flexibility of use
- c** Increase utilization of space
- d** Promote physical, visual, and operational connectivity
- e** Increase access to daylight area to bring warmth and visual clarity

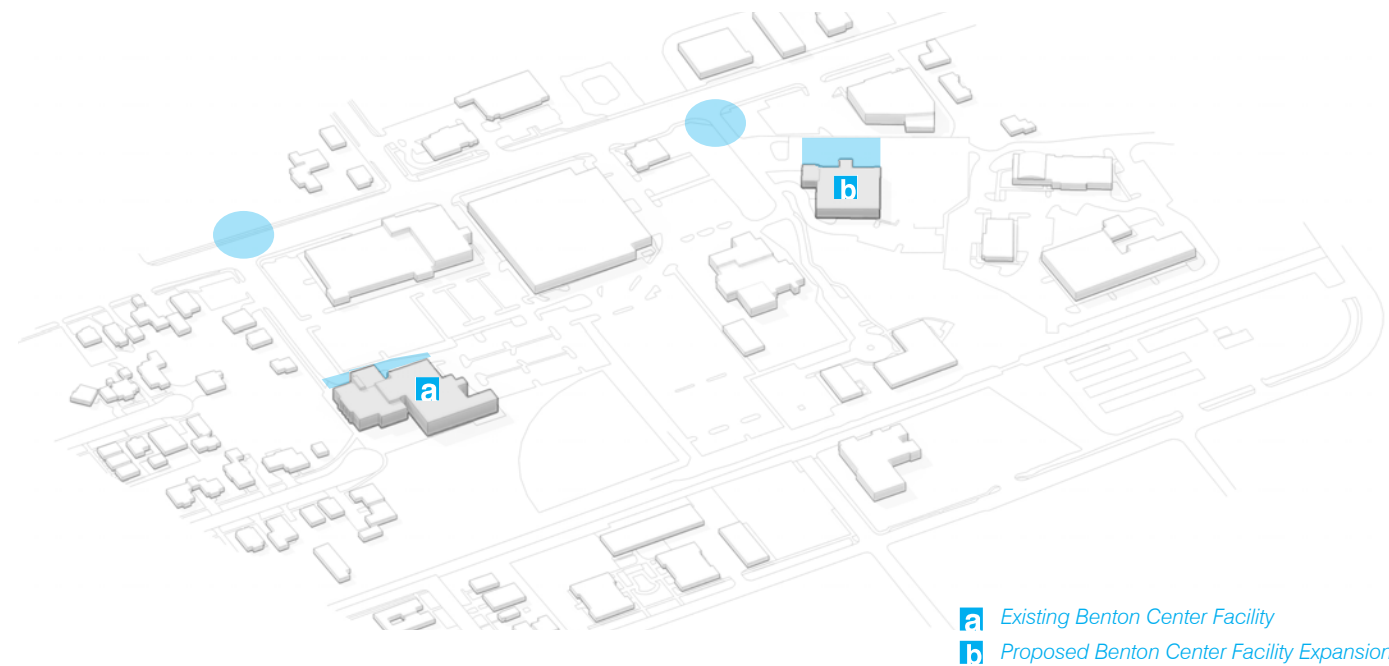


Above: Photo of existing condition and inspiration sketch of the forum



BENTON CENTER CAMPUS





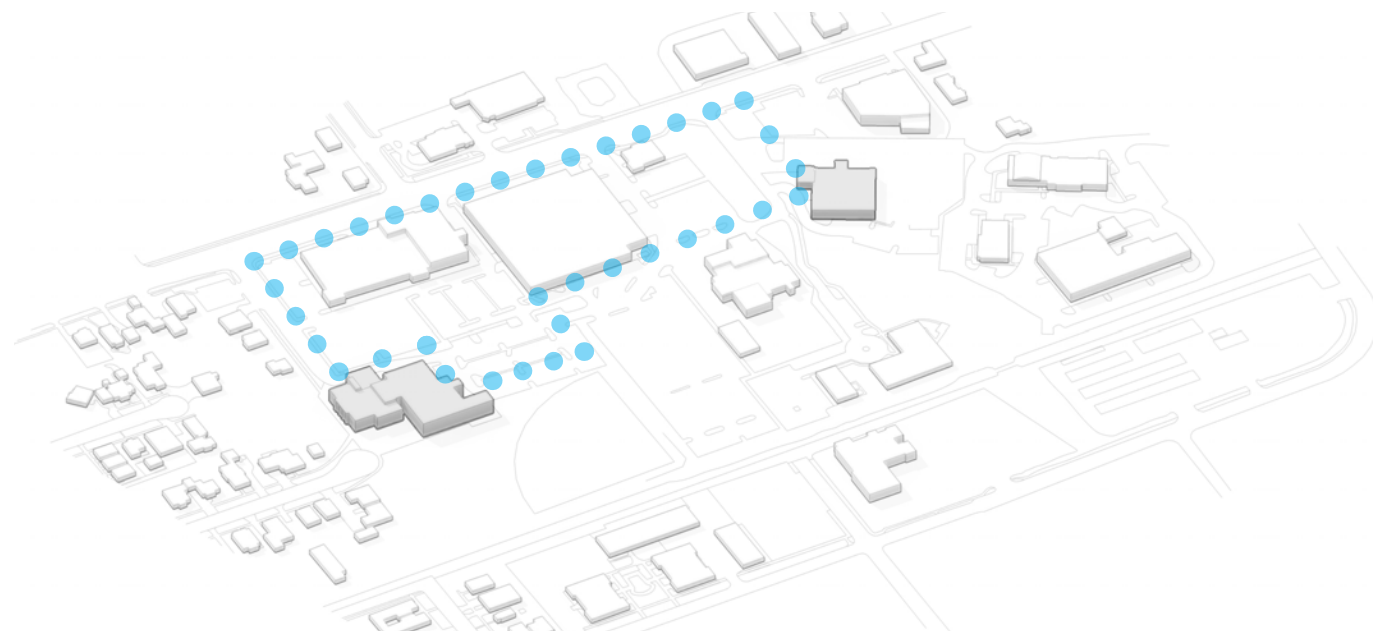
OVERVIEW

LBCC had been conducting evening adult education classes in Corvallis High School classrooms since 1967, having taken over the program from CHS. Under LBCC President Raymond J. Needham, the Benton Center was opened in Corvallis in December 1971. In September 1977, the Benton Center moved to new headquarters in the former Washington Elementary School in Corvallis, originally built in 1923. The new space accommodated labs for ceramics. Math and business technology became the core programs offered, in addition to ongoing adult basic education and parent education. The school's gym became home to the center's fitness classes. LBCC's first microcomputer lab was established at the Benton Center in the early 1980s. The \$19.1 million bond measure that voters passed in November 2000 allowed planning to begin on a \$5 million renovation of the Benton Center. The Corvallis

Planning Commission approved architectural plans for the renovation in October 2002, with the actual work taking place in 2003-04. The project included increased space for student services, as well as faculty offices, seven new classrooms, and an improved entrance for the center.



Top Left: Diagram of Benton Center campus entry areas
 Top Middle: 9th Street and Reiman Ave-street presence
 Top Right: Inspirational photograph of successful campus signage
 Bottom Left: Inspirational photograph of successful arrival sequence
 Bottom Right: LBCC's "inspired" branding

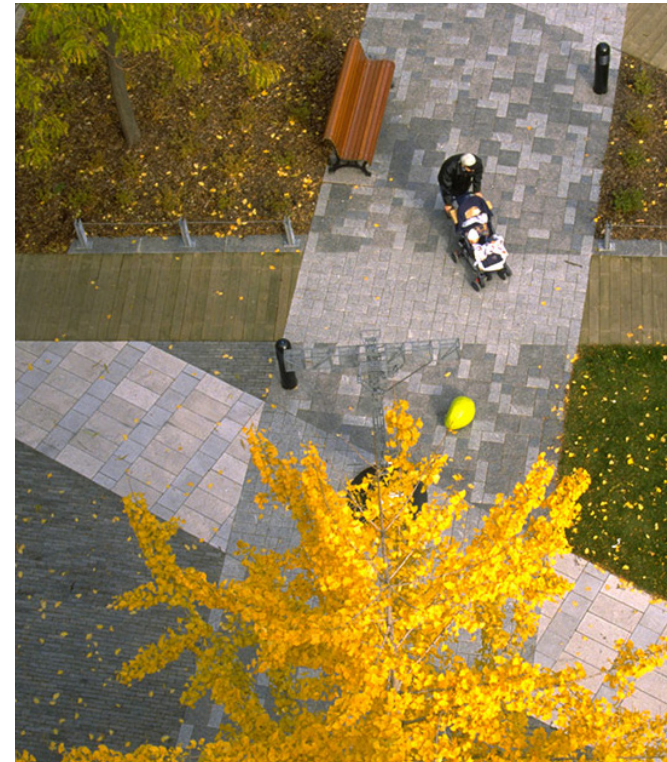


CIRCULATION AND CONNECTIVITY

The existing Benton Center and the future academic classroom building are physically separated by parking lots and properties owned by others. Connectivity between the two facilities will need to be coordinated between LBCC, the design team, and the other property owners. The pedestrian paths connecting the two facilities will need to be delineated through the parking lots for clarity. Lighting, visibility, color, or texture on the pedestrian paths should be implemented for safety and security.

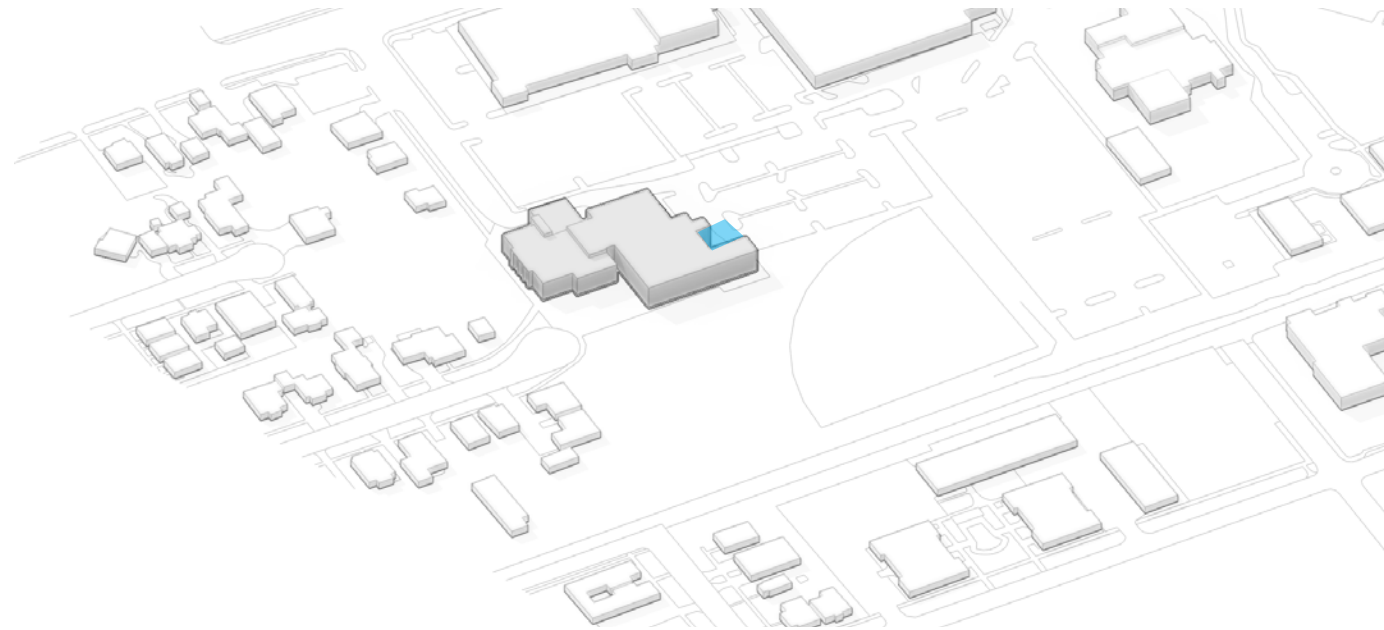
SENSE OF ARRIVAL

LBCC Benton Center's presence on NW 9th Street is currently non-existent. With the addition of the property on NW 9th Street and Reiman Avenue, the Benton Center will have a stronger street presence and have opportunities to redefine its brand and identity to the community. Appropriate branding, signage/wayfinding, and landscaping can help frame and locate the new facility and the existing Benton Center. The arrival sequence to the existing and the new facility need to be architecturally choreographed to communicate an open, safe, and welcoming campus.



Left: Diagram of Benton Center circulation
Top Middle: Inspirational photograph of circulation
Bottom Middle: Existing photograph of campus circulation
Top Right: Inspirational photograph of circulation
Middle Right: Inspirational photograph of circulation
Bottom Right: Inspirational photograph of connectivity





EXPAND THE CERAMICS PROGRAM

The Benton Center ceramic studio has been a thriving and growing program for the students and the Corvallis community for decades. With the design and planning of the newly acquired future classroom building and the renovation of some existing spaces at the Benton Center building, locating an area for the ceramic studio expansion should be incorporated. The outdoor plaza to the north of the ceramic studio is the natural location for expansion. Depending on the size of space needed for expansion, it is recommended to maintain some outdoor gathering area to maintain the existing inside-outside class opportunities.

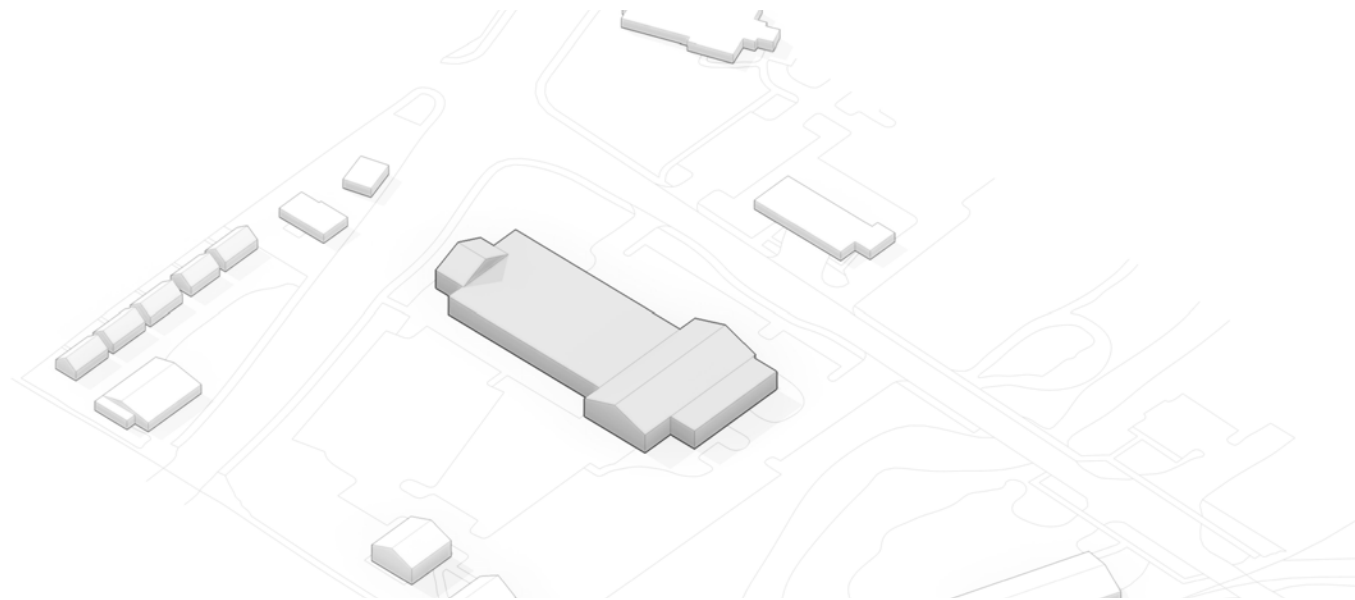


Top Middle: Photograph of successful existing ceramic studio design
Bottom Middle: Photograph of ceramics from Benton Center students
Top Right: Photograph of ceramics class



LEBANON CENTER CAMPUS





OVERVIEW

The Lebanon Center was first established in Lebanon Union High School in 1972. The East Linn Workforce Development Center houses the LBCC Lebanon Center and offices for the Oregon Employment Department, DHS Community Human Services, and the Community Services Consortium in a 44,000 square foot building.

ADJACENCY, SAFETY, SECURITY, AND PRIVACY

Agencies – DHS and Employment Resources. Currently, all access and control points to enter the building occur in the main two-story lobby. Due to the sensitive nature of the programs the public agencies offer, the safety, security, and privacy of the staff and public should be considered. The entry control points or adjacencies should be assessed to meet the the safety, security, and privacy of all users.

SENSE OF ARRIVAL

LBCC Lebanon Center has great street presence on the Industrial Way. The building entry is very well defined with a two-story architectural entry. Branding and identity for the college can be strengthened by adding more branding campaign materials and signage.

MAIN LOBBY AND IN-BETWEEN SPACES

The two story main lobby and the student’s informal in-between spaces are very well utilized. These spaces have great access to natural light and visual connection to nature. The acoustical properties of all the surfaces should be improved while maintaining the open and collaborative nature of these spaces.

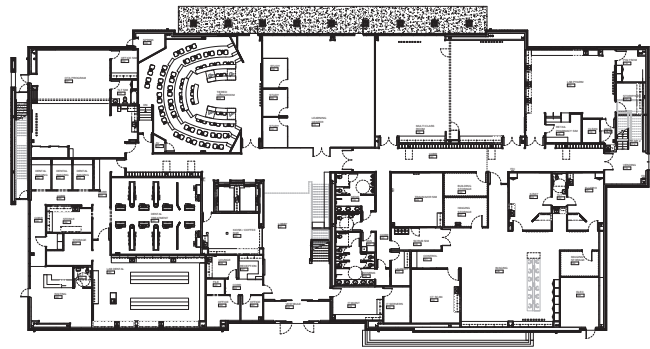


Left: Diagram of Lebanon Center Campus
 Top Middle: South Entry
 Bottom Middle: Lobby Interior
 Top Right: Acoustic ceiling panels
 Lower Right: Acoustic wall panels.

CURRENT PROJECTS

Construction on the LBCC Health Occupations Center is currently underway on the Lebanon campus. This 42,000 square foot building is located next to major healthcare providers and provide a opportunities for collaboration and resource sharing and will bring all LBCC healthcare programs into one learning space.

The building is anticipated to be open in 2017 and allow relocation of the Vet Tech program to the East Linn campus, creating extra space in Tadena and Red Cedar Halls on the Albany campus.



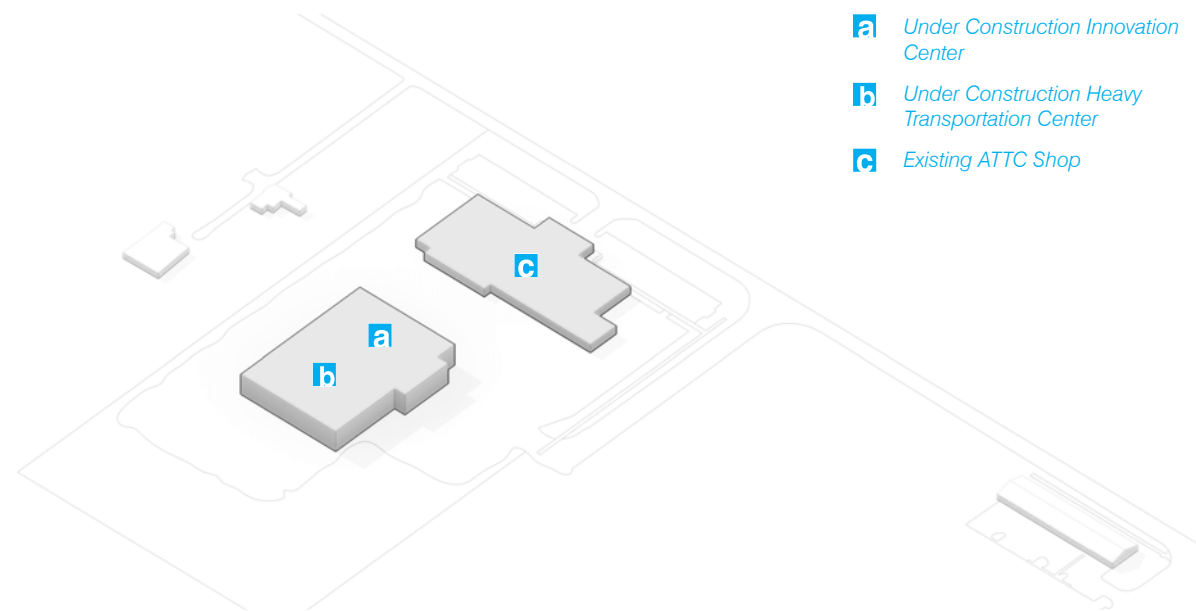
Left: Floor plan of Health Occupations Center
Top Right: Render of Health Occupations Center
Bottom Right: Construction photograph of Health Occupations Center





ATTC CAMPUS





- a** Under Construction Innovation Center
- b** Under Construction Heavy Transportation Center
- c** Existing ATTC Shop



OVERVIEW

The LBCC Advanced Transportation Technology Center, future Innovation Center and Heavy Equipment/Diesel Center are state-of-the-art facilities located in Lebanon, Oregon. In partnership with the City of Lebanon and local and national industry, LBCC's ATTC is focused on leading edge, energy efficient, alternative energy transportation skills. The center will train students to the highest industry standards to meet the workforce needs for technicians to install, maintain, and repair both traditional and new propulsion systems.

SENSE OF ARRIVAL

The LBCC Advanced Transportation Technology Center (ATTC) and future Innovation and Heavy Equipment/Diesel Centers have strong street visibility and presence. The state-of-the-art-training equipment and tools can be showcased more on the building exteriors.

STUDENT AMENITIES + CONNECTIVITY

Since students tend to stay in the facilities for long hours, providing amenities internally and outside should be considered. With the addition of the Innovation and Heavy Equipment/Diesel Center, there is an opportunity to provide some outdoor lounge or learning spaces that

CURRENT PROJECTS

The Innovation Center and the Heavy equipment Center are currently under construction with completion scheduled for late September of 2016. When completed, the Heavy Equipment / Diesel program will move to the ATTC site vacating the Industrial C building. Portions of Industrial A were vacated earlier when the Automotive program moved to the ATTC campus.

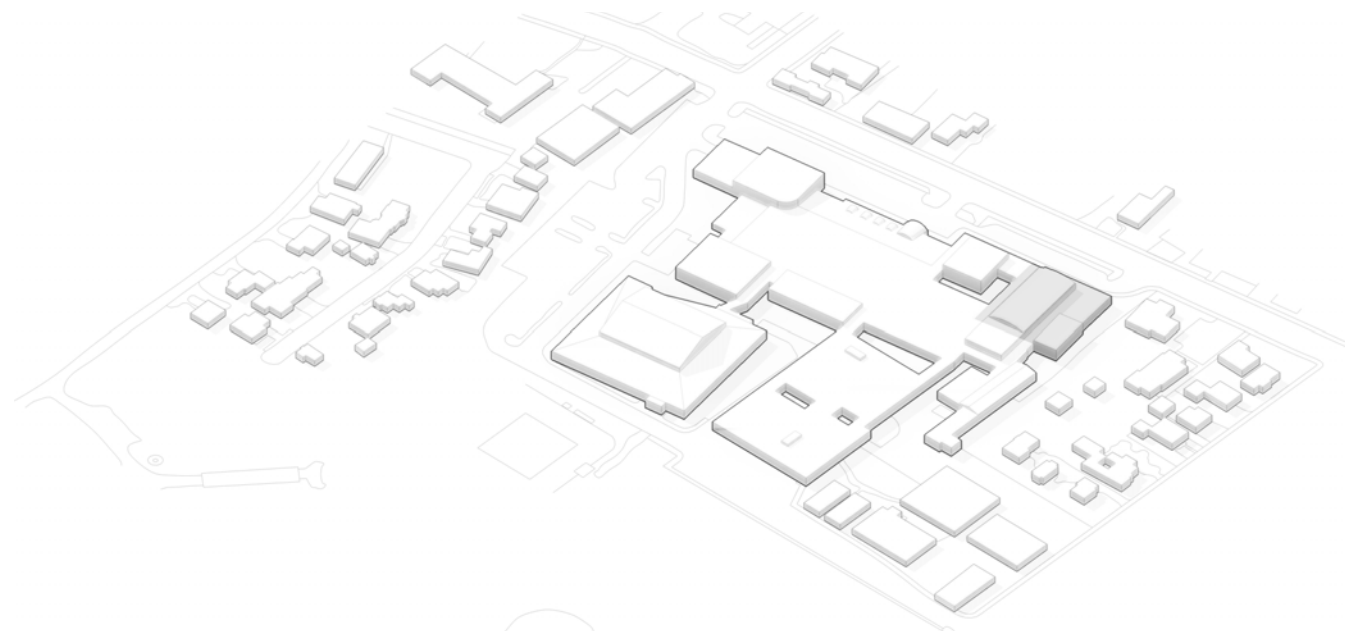


Left: Diagram of LBCC ATTC Campus
 Top Middle: Existing ATTC shop
 Top Right: Existing ATTC shop
 Bottom: Rendering of future



SWEET HOME CAMPUS

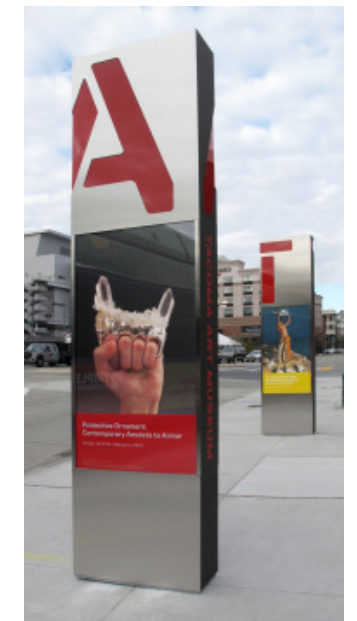




OVERVIEW

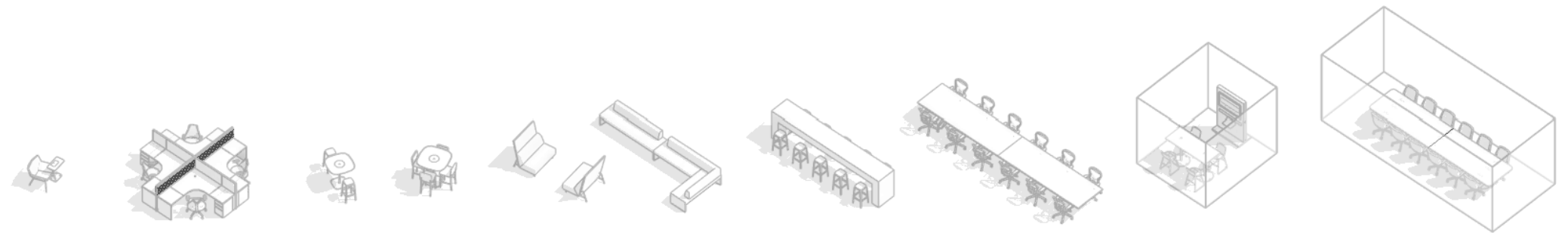
The LBCC Sweet Home Center is a purpose-built home for this extension program that serves the communities of Sweet Home, Brownsville, Cascadia, Crawfordville, and Foster. The Center was constructed as part of the Sweet Home High School in 2003.

The design team was unable to tour the facility but discussed the buildings challenges with the FMPAC. Generally the Center needed to have a stronger presence for the community both on the exterior of the facility as well as its connection to the high school. Stronger signage and way finding and a more open presence within the school would create a more opening



Far Left: Diagram of LBCC Sweet Home
 Middle: Photograph of existing entry
 Top Right: Interior Branding Example
 Bottom Right: Exterior Branding Examples





OFFICES AND WORK SPACE RECOMMENDATIONS

OFFICES AND WORK SPACES

Organizations in both public and private arenas are facing a drain on experienced staff as the baby boom generation approaches retirement age. This has been called the “Silver Tsumami,” where normal attrition rate to retirement in the public sector is approximately 15% per year, experts are anticipating that number may jump to 40% over the next few years. That means that attracting younger talent is critical for any organization and the workplace environment is a critical recruitment tool.

Employee offices at LBCC’s Albany campus are missing opportunities to maximize human capital. Many offices and workspaces are located away from the perimeter walls of buildings, resulting in spaces that don’t have access to daylight or exterior views. Studies show that employees are more engaged, healthier, and take fewer sick days when they are in an environment that is connected to nature. The current locations for many of the workspaces don’t support this.

Existing office furniture does not support the maximization of space and efficiency. Some employees have offices that consist of folding tables, missing the opportunity for integrated technology and storage solutions. Current office furniture also fails to support choices in posture, which has a positive effect on the health and well being of employees. While many of the offices are small and house more than one faculty member, the negative effects of this could be mitigated through innovative furniture solutions.

Current workspace layouts at LBCC’s Albany campus also miss opportunities to maximize spontaneous interaction. While LBCC provides a space for employees and faculty to bring lunch, it doesn’t provide amenities that support collaboration and group functions. Capitalizing on these opportunities would have a huge positive effect on the institutional culture.

NATURE

People have been shown to have a positive response to environments that incorporate a biophilic approach in their design. The presence of plants, organic patterns, textures, and materials elicits a natural connection within people that is referred to as the “biophilic response.” This response is intuitive to humans and is important to our physical and mental well being. Biophilic responses help reduce stress, boost energy, enhance concentration, and help people to increase awareness and focus. Through the use of innovative strategies throughout the space, LBCC can capitalize on these innate emotional responses to nature.

Providing direct views to the exterior is one successful strategy. In addition to the daylight that these views provide, people are also exposed to naturally occurring patterns from the natural environment.

In spaces where direct visual access to the exterior is not available, selecting materials with naturally occurring patterns is a viable approach. There are a wide range of materials that incorporate natural patterns, from wood to more recent innovations utilizing glass and resins that put natural forms on display. References to nature can also be found in the movement of people through spaces.

Other ways of creating a biophilic response are to design spaces that reflect the experiences we have in nature. For example, offering spaces that create a sense of being safe within a cocoon, as well as spaces that create a sense of the unknown and discovery. These kind of spaces help enhance the engagement employees have with their environment.

DAYLIGHT

The benefits of properly daylighting spaces are well documented. Employees that work in an environment



that takes advantage of natural light are more engaged, productive, and healthy. There are many means through which to accomplish daylighting a space.

The most direct approach to daylighting is through the use of windows. Offices and administration spaces that are located at the perimeter of buildings would benefit through the use of operable windows and clerestory windows.

Daylighting employee spaces that are located away from the perimeter of buildings can be provided through overhead illumination. Skylights can be used in spaces that are located on the top floor of buildings. Spaces that are located on lower levels with no direct access to daylight through roof openings can utilize light tubes to allow daylight penetration through multiple floors.

CONNECTIVITY

Increasing connectivity helps bolster collaboration and facilitates the sharing of ideas and information among employees. Designing active zones to facilitate



spontaneous interaction leads to increased connectivity and collaboration between employees. Active zones can be based around amenities that offer a contrast from the rest of the environment. Kitchens and eating areas that encourage employees to visit and mingle are an example of such zones. Other examples include courtyards, gardens, areas for physical activity, and gathering spaces. Regardless of which activities take place in these zones, it is imperative that there be adequate support in the space for employee interactions to take place. Providing a diversity of spaces and choices in posture for groups of various sizes is important.

CHOICE OF POSTURE

Providing employees with a palette of posture choices will support employees engaging in different modes of work and adds to the overall health of employees. Offering an array of posture opportunities, such as soft-seating, reclined seating, group benching, and standing encourages employees to move about their workspaces and engage their environment as their tasks require. They

Opposing Page: Photographs of existing conditions



will feel more enabled to utilize a diversity of spaces and seek out arrangements that optimize their tasks.

In encouraging movement, employees are more likely to interact with each other and engage in collaborative tasks. Additionally, overall wellness in the office is increased as employees are no longer relegated to sitting in a desk for hours on end. They will be able to move, stand, and choose seating as necessary.

TRANSPARENCY & SECURITY

Striking a balance between transparency and security is key to a successful workplace design. Creating transparency at the edge of workspaces creates a visual connection to the campus beyond. This displays a sense of approachability and ethics to the students on campus. Creating internal transparency works to further create a sense of team for the administration and staff. Effectively putting conference rooms on display allows them to activate the space by showcasing energy and collaboration. This energy is translated to the rest of the staff and makes them more likely to engage with their peers. Creating reliights into faculty offices makes them more approachable and can reinforce a dedication to integrity and ethics.

DIVERSITY OF SPACES

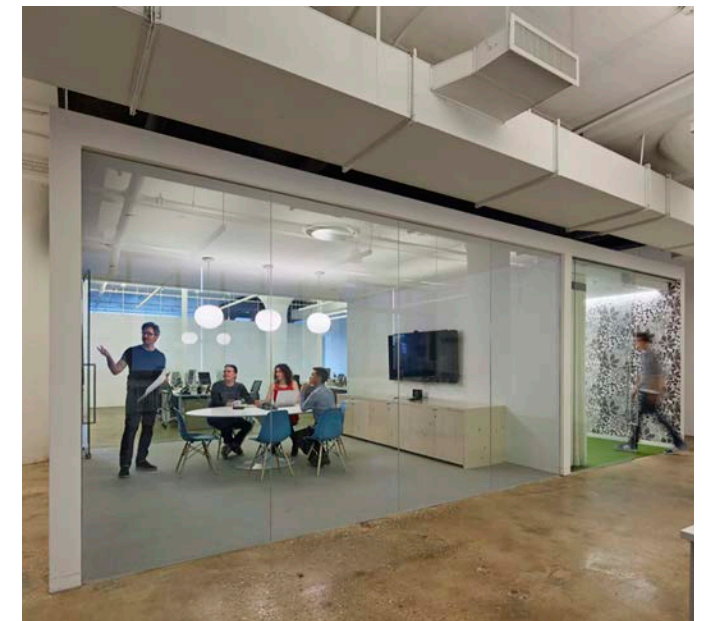
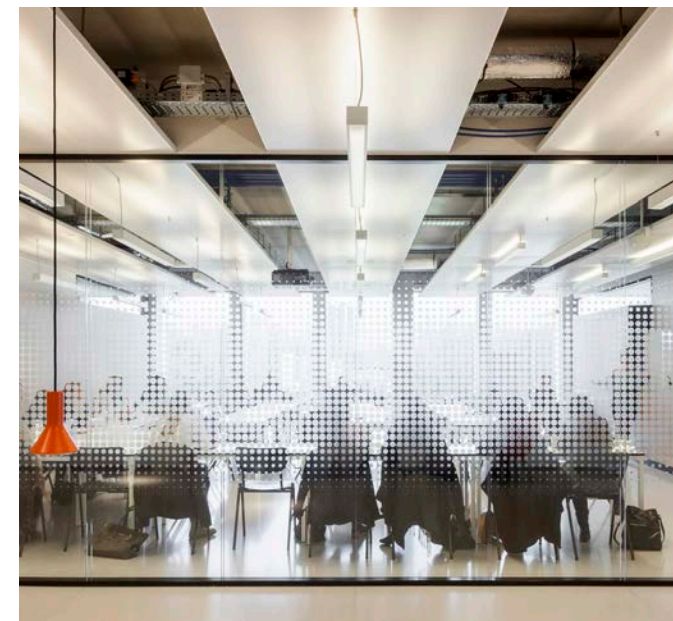
Throughout the course of a day employee tasks can range from performing individual work to working in large groups. To ensure that an organization is providing the appropriate support for employees, a workplace should offer a diverse range of work spaces.

A variety of individual work spaces should be provided for employees to use. These spaces can be both formal (dedicated to specific users) or informal (temporarily owned on a first-come first-serve basis). All individual work

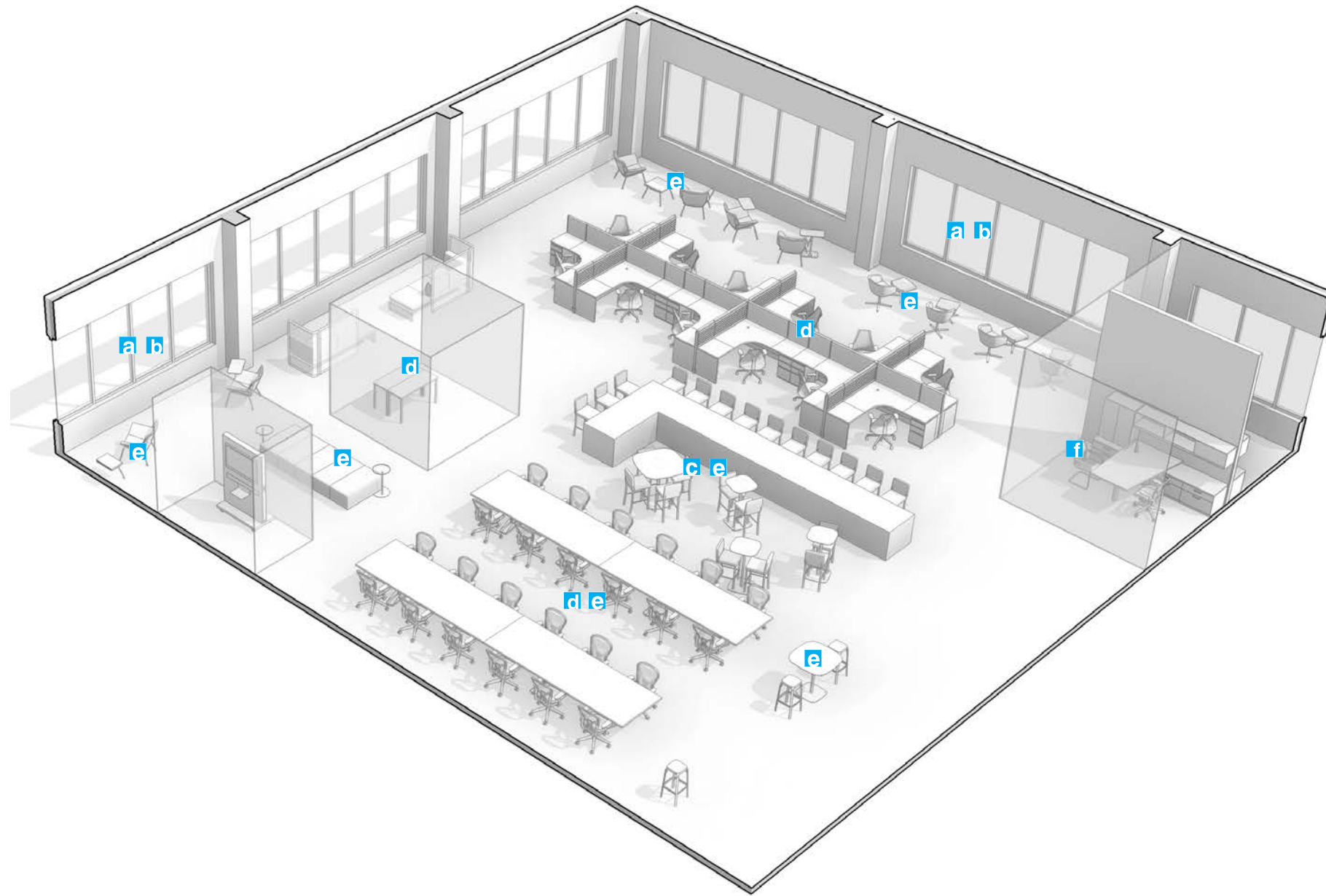
spaces should allow the user to control their immediate environment, but their accessibility to external users should be determined through programming. Group work spaces should range in both size and formality.

RESULTING SPACE

The combination of these recommendations creates an office space that provides a healthy work environment that people want to be in. It also creates space for people to choose their method and location of work to fit the type of task they're performing, while providing options for cross collaboration.



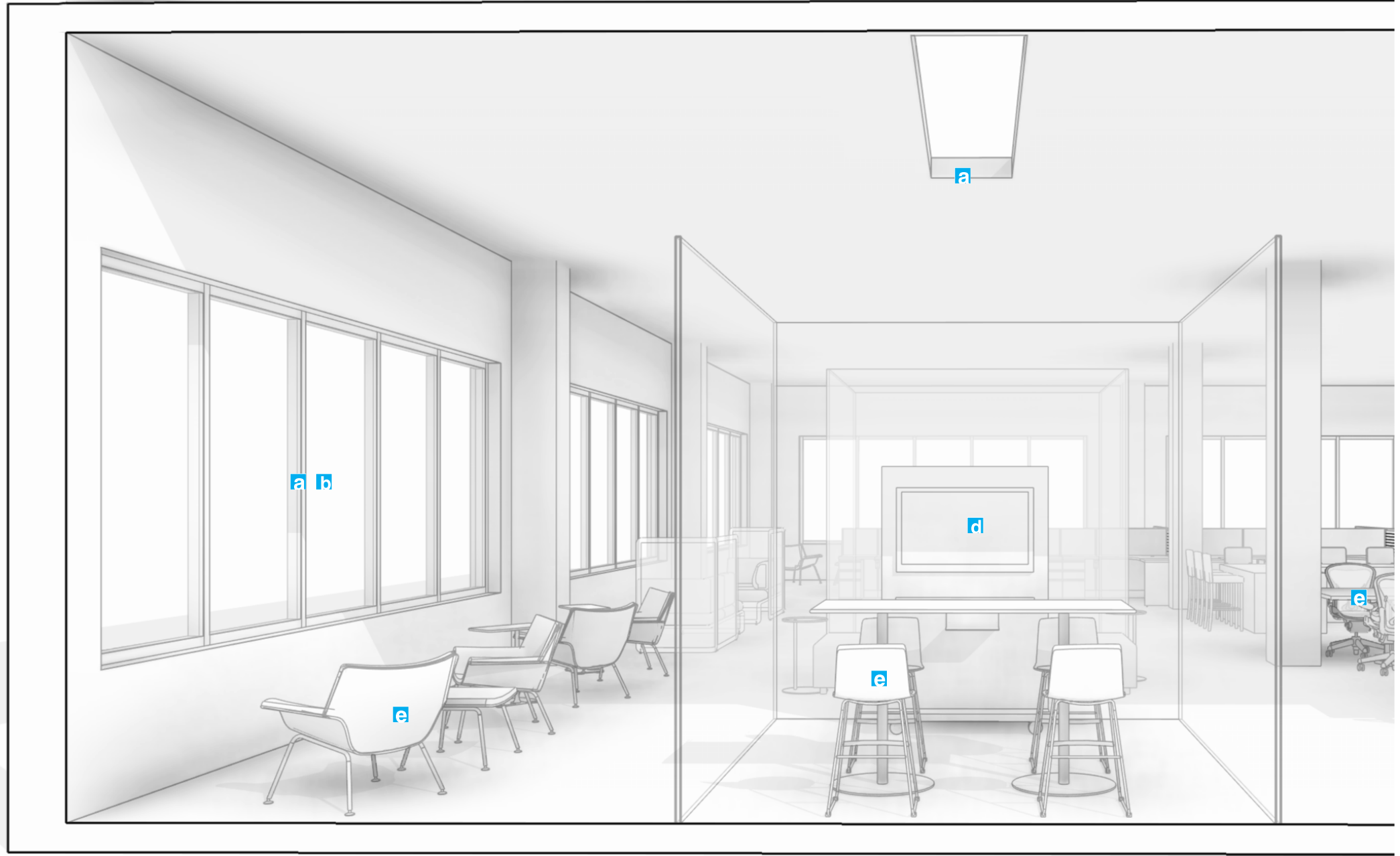
Left: Inspirational photograph of transparency and security
Top Middle: Inspirational photograph of daylight
Bottom Middle: Inspirational photograph of choice of posture
Top Right: Inspirational photograph of daylight
Bottom Right: Inspirational photograph of connectivity



- a** *Natural light from solar tubes and windows contribute to employee happiness and productivity*
- b** *Views to the exterior create connections to nature which has a positive effect on employees*
- c** *Designing zones to enhance connectivity increases the chances of spontaneous interaction*
- d** *A diversity of spaces ranging from individual workstations, group work areas, and individual informal seating accommodate a range of tasks*
- e** *Offering choices of posture fosters employee engagement and increases overall wellness*
- f** *Creating transparency to offices makes them more approachable and displays a sense of ethics*

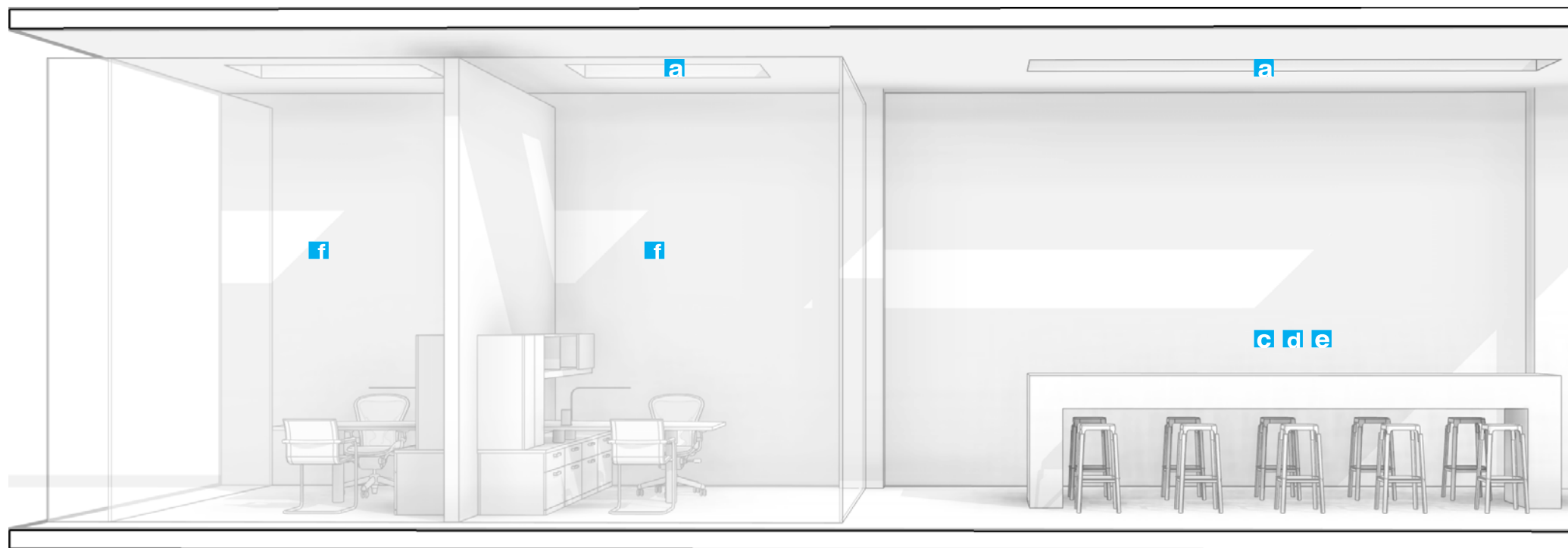
Above: Diagram of potential workplace environment





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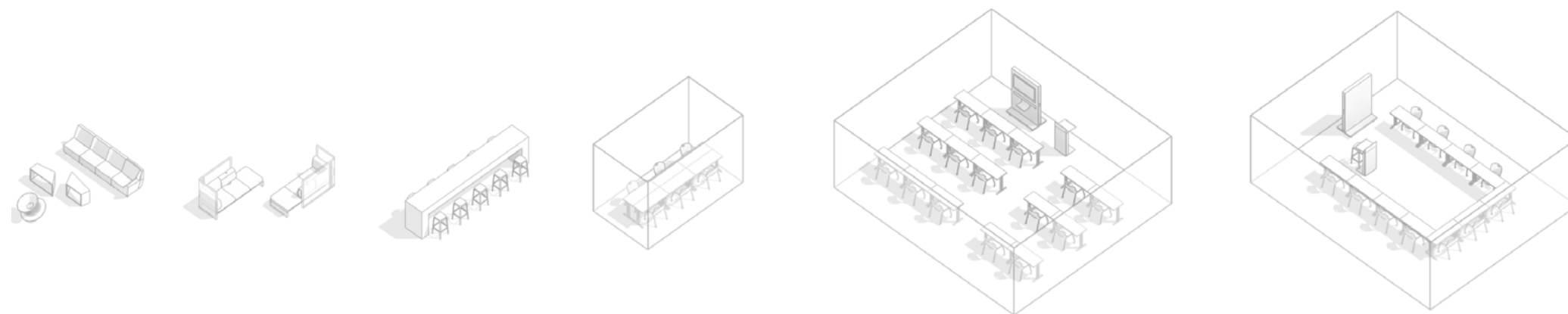


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LEARNING SPACES

LEARNING SPACES

Current LBCC learning spaces on the Albany campus are missing key high-impact features that would help support the learning process. Many classrooms are located away from the perimeter walls of buildings, resulting in spaces that do not have access to daylight or exterior views. Studies show that students are more engaged, healthier, and learn better when they are in an environment that is connected to nature.

Every student and educator is unique, as is each class. Taking a “one-size fits all” approach to learning spaces can result in missed opportunities to set faculty and students up for success. It is recommended that LBCC provide flexible learning spaces capable of being transformed for the needs of students. Current classroom furniture at LBCC does not allow for the classroom to be easily reconfigured for the needs of the class. Static furniture is limiting to educators who may want to convert classrooms from a traditional front-facing layout to more collaborative layouts.

As technology continues to advance at a rapid pace and further impact the learning environment, it is recommended that LBCC position their facilities to support emerging technologies in the classroom. Current and future students expect to have constant access to a wide array of technological tools. Learning spaces should serve to support students and educators in reaching their highest potential.

DAYLIGHT

The benefits of properly daylighting spaces are well documented. Students that learn in an environment that takes advantage of natural light are more engaged, productive, and healthy. Daylighting can boost their learning potential and battles myopia. There are many means through which to accomplish daylighting a space.

The most direct approach to daylighting is through the use of windows. Classroom spaces that are located at the perimeter of buildings would benefit through the use of operable windows and clerestory windows.

Daylighting classrooms that are located away from the perimeter of buildings can be provided through overhead illumination. Skylights can be used in spaces that are located on the top floor of buildings. Spaces that are located on lower levels with no direct access to daylight through roof openings can utilize light tubes to allow daylight penetration through multiple floors.

NATURE

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Providing direct views to the exterior is one successful strategy. In addition to the daylight that these views provide, people are also exposed to naturally occurring



patterns from the natural environment.

In spaces where direct visual access to the exterior is not available, selecting materials with naturally occurring patterns is a viable approach. There are a wide-range of materials that incorporate natural patterns, from wood to more recent innovations utilizing glass and resins that put natural forms on display.

DIVERSITY OF SPACES

Students represent a diverse cross section of the population. Some have yet to graduate high school, others are just entering college, and others still have decades or years of experience in the professional world and are going back to school to develop new skills. Likewise, they represent a broad array of home and family situations. Students attend a wide-range of class types at irregular times of the day. It is recommended that LBCC



offer a diverse range of spaces to support the unique needs of their students.

A variety of individual work spaces should be provided for students to use. These spaces can be both formal (dedicated to specific users at specific times) or informal (temporarily owned on a first-come first-serve basis). All individual work spaces should allow the user to control their immediate environment, but their accessibility to external users should be determined through programming.

Group work spaces should also range in both size and formality. Providing informal workspaces where groups can spontaneously meet and temporarily own is crucial to facilitating collaboration among peers. Likewise, formal workspaces where teams are allowed to stake ownership of spaces at a pre-determined time is important to larger working groups who are working toward a specific objective over a longer period of time.

Above: Photographs of existing conditions



CHOICE OF POSTURE

Just as students require a diversity of spaces, they also require a diverse palette of posture options. Throughout the day students across the campus engage in vastly different modes of work. LBCC needs to provide furniture options that support this.

Students can often times stay on campus for hours between classes. Providing a comfortable environment for them to wait and conduct school work in their downtime will help produce their productivity in the long-run. Varieties of soft-comfortable seating with places to store books and tools will help them optimize their time.

Providing shared group seating for students will enable them to expand their social circles and increase the amount of collaborative opportunities on campus. Creating opportunities for sporadic interaction is important to activating the campus.

Providing choices of posture extends from public spaces to the classroom as well. Students will spend a lot of time in classrooms, providing them with a choice between a variety of seating and standing options that allows them to choose which fits best for them. This increases productivity and engagement in the classroom.

TECHNOLOGY

Technology has had a profound effect on learning spaces. Students from the Millennial and Gen-Z generations are more “maker” oriented than past generations. As a result, they demand access to a wide array of analog and digital tools that learning spaces need to support. Flexibility, power consumption, networking, and cloud-based tools are all becoming part of the normal everyday requirements for students to meet their educational goals. Well-designed spaces can support the growth of technology in learning spaces. Group-benching can

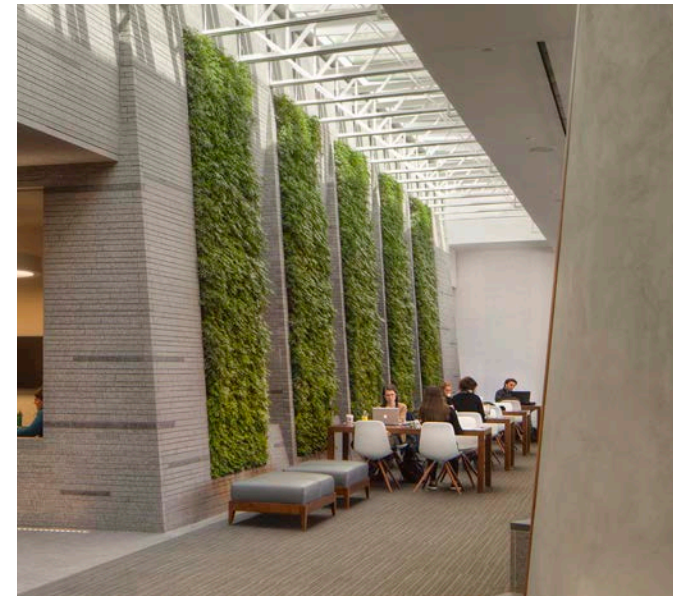


incorporate data and power hookups for students when they are in-between classes. Computers are becoming less and less relegated to specific rooms, and students are capable of leveraging them from anywhere on or off campus. Providing appropriate furniture solutions and amenities to support their computing needs can have a profound impact on their performance in the classroom.

In dedicated classrooms, technology solutions such as mobile screens, media walls, and IFTT responsive lighting aid in creating an immersive learning environment.

FLEXIBILITY

Flexibility is key to learning spaces of the future. Millennials and the rising “Gen Z” demand a voice in ownership of the spaces that they occupy. Their education experience has been more flexible and hands on, and as a result, they expect post-secondary education to embrace this approach as well.



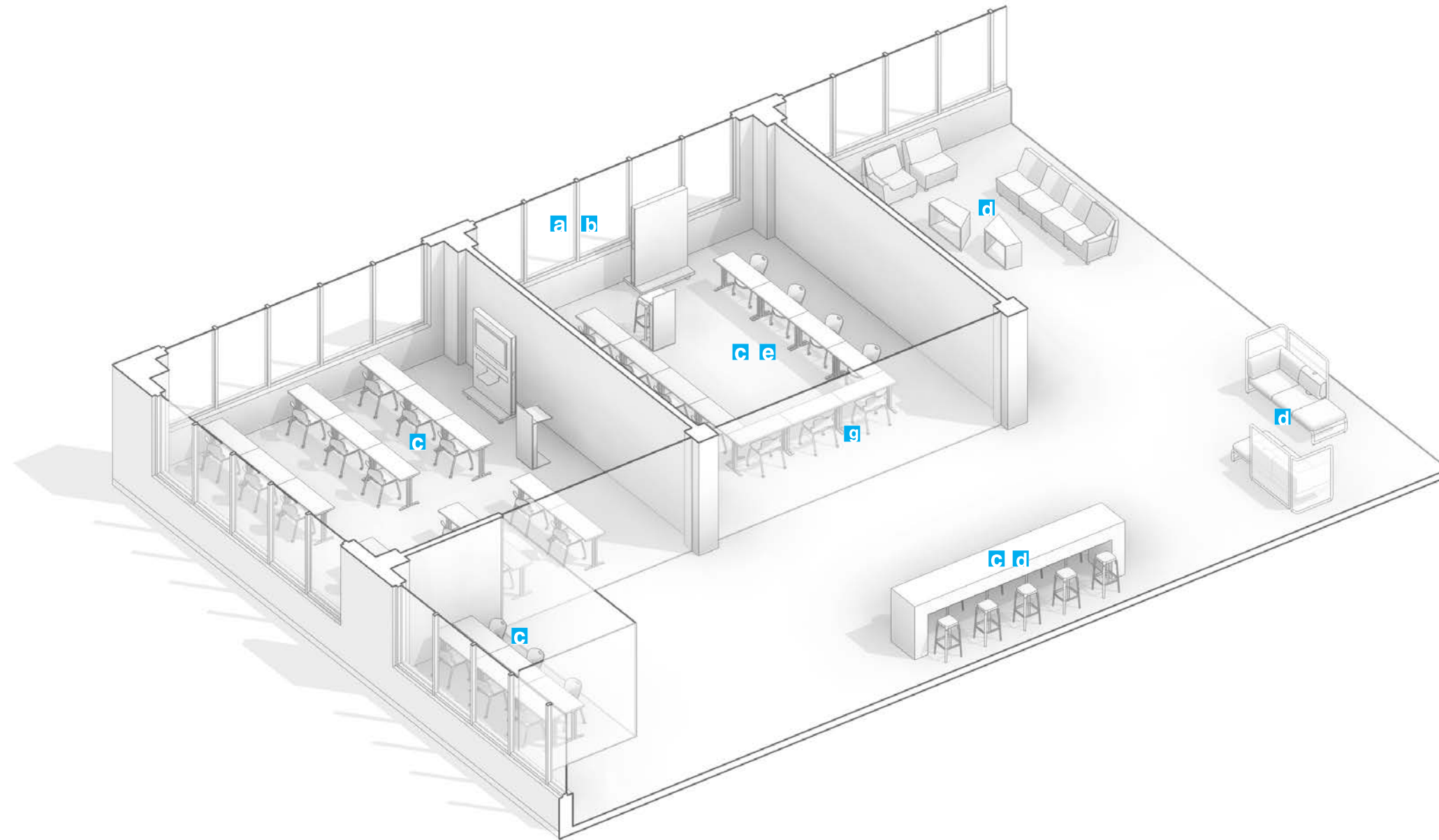
Providing students with flexibility within learning spaces enhances engagement and with it performance in the classroom. Allowing students to stand, sit, or adjust their classroom for group activities is setting them up for success in the long term.

Increased flexibility is also a benefit to faculty. Flexible furniture solutions and room layouts allow faculty to adjust their teaching approach to their subject matter on a daily basis. This allows them to better connect with their students and have a larger impact on them during the hours in which they are together in the classroom.

Flexibility also extends outside of dedicated classrooms. Movable partitions, sliding doors, and other design solutions can allow entire spaces to merge together, or edges to open to the exterior and classrooms to extend into courtyards, or internal gathering spaces.



Left: Inspirational photo of flexibility
Middle: Inspirational photo of daylight
Top Right: Inspirational photo of technology
Middle Right: Inspirational photo of choice of diversity of spaces
Bottom Right: Inspirational photo of diversity flexibility



Above: Diagram showing potential learning space layout





- a** *Natural light from solar tubes and windows contribute to student energy, engagement, and health*
- b** *Views to the exterior create connections to nature which has a positive effect on students*
- c** *A diversity of spaces ranging from large lecture halls, medium classes, small study rooms, and breakout spaces will support multiple student functions*
- d** *Offering choices of posture fosters student engagement and increases overall wellness*
- e** *Flexible spaces allow faculty and students to adapt the environment to their immediate needs*
- f** *Planning for the continued development of technology is important to creating a space with a long life span*
- g** *Striking a balance between transparency and security allows engagement across the campus*

Left: Diagram showing learning space elements





SAFETY AND ACCESSIBILITY

SAFETY

In addition to the LBCC's mission to expand learning opportunities for students, the college also has a responsibility to keep them safe while on campus. The potential threats to student safety can come from multiple directions including natural disasters and man-made scenarios.

In the realm of natural disaster threats, the issue that looms large for most in the northwest region is the earthquake potential from the Cascadia Subduction Zone. A quake in this area would be of a magnitude and duration that would severely impact most of the communities west of the Cascade range. Seismic strengthening of existing buildings is being recommended throughout the region to prepare for such an event.

It is difficult to believe that a center of learning must also have a need to be defensible, but in our culture man-made threats do exist. This is most recently illustrated by the Umpqua Community College shooting in 2015.

Many of the threat mitigation or reaction strategies are more based in policy than in physical architecture. The architectural security solutions have to be applied cautiously, otherwise they run counter to an open and inclusive learning environment. The goal is to strike a balance that provides maximum student safety with a maximum sense of a welcoming learning environment.

EARTHQUAKE

While a seismic evaluation was not part of this master plan, it is highly recommended as a next step given the age of the campus buildings and the role the college may have after an event. This should be undertaken by a structural engineer familiar with the potential threat and familiar with academic learning environments.

The goal with any seismic upgrade is to make the necessary building modifications with minimal impact to the functionality of the learning spaces and building operation.

NOTIFICATION

In the event of a security threat or attack on a student, time becomes essential. The campus currently has emergency phones throughout the campus that are a direct link to Campus Public Safety. Documenting the exact location of these was not part of the scope of this master plan. It is recommended that the placement and functionality of these devices are routinely evaluated by an independent security consultant.

In addition, the college has staff that have been trained for emergency scenarios, and students are encouraged to download a smart phone app that allows them to report incidents quickly.

ACCESSIBILITY

At the kick-off meeting for this master process, there was much discussion on the level of accessibility the college should strive for in their institutions. There was general agreement from the group that full universal design would be the target. This approach suggests that all campus facilities are designed to be inherently accessible, not just to code minimums. While this was discussed as a target,

it was recognized that budgets are limited and that this mandate needed to be discussed and delivered by LBCC leadership.

The purpose of this master plan was not to provide an exhaustive review of the American with Disabilities Act deficiencies, rather the purpose was to highlight areas for improvement that could be undertaken within the next ten years to make meaningful steps toward the college's goals.

Given the age of the facilities, the accessibility challenges varied. Typically issues included stairs and handrail configurations. Larger issues specifically relative to the main campus were the positions and number of the elevators and some bathrooms that didn't have required clearances.

SECURITY

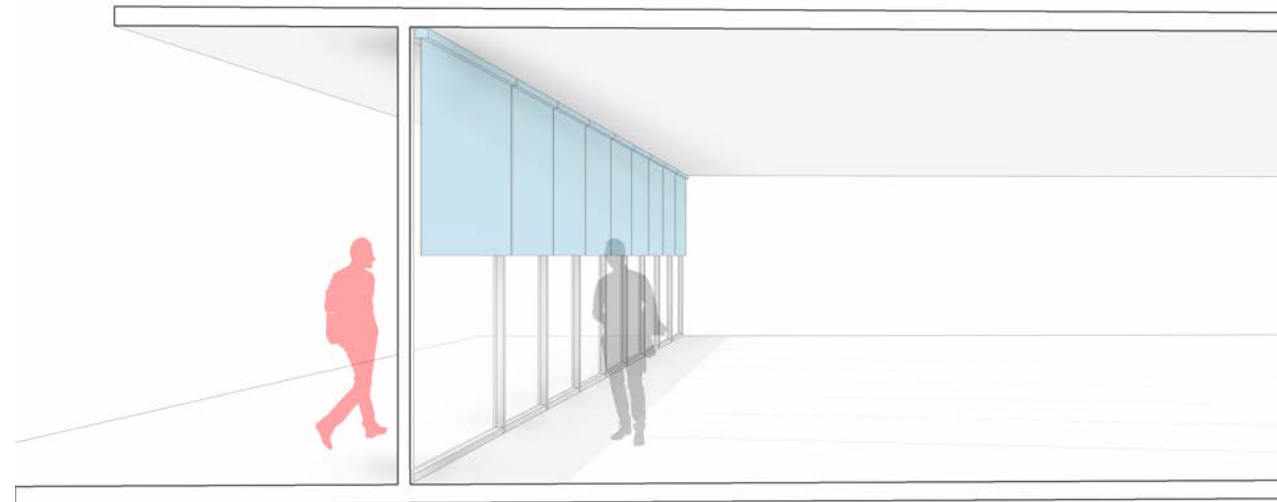
Throughout the master plan process, any of the discussions relative to visual connection and transparency were always followed by questions of security. The most important of these questions was how secure the facility should be and what the impacts would be to the educational mission of the institution.

There were suggestions about creating a closed campus that allowed for control and security screening at each of the campus access points. There was also discussion of providing key cards for students and faculty. While no specific strategies were adopted as part of the conversation, the general feeling was that these types of measures would go too far.

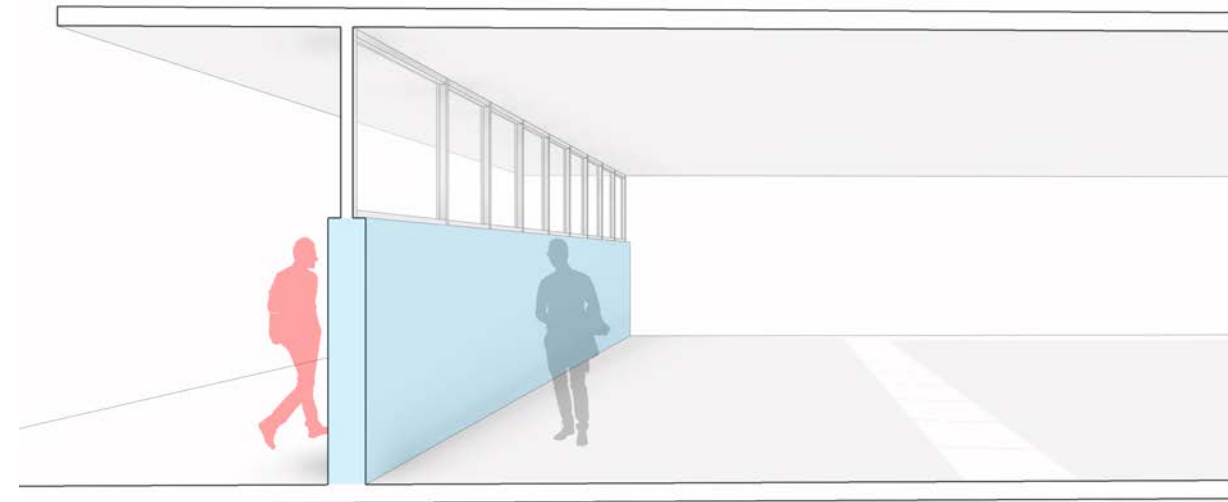
Based on other recent events at Umpqua Community College and UC Davis, there are specific steps that can be taken within the architecture that can mitigate the impacts of such an attack without compromising the openness of the campus.

Levels of transparency can be modified to provide visual security. Examples of this would be motorized blinds tied to a campus-wide alert system, or translucent film. Another strategy is to provide lockable shelter locations that are well marked within each of the buildings' primary spaces. In addition, all classroom locks should be updated to be lockable from the inside.

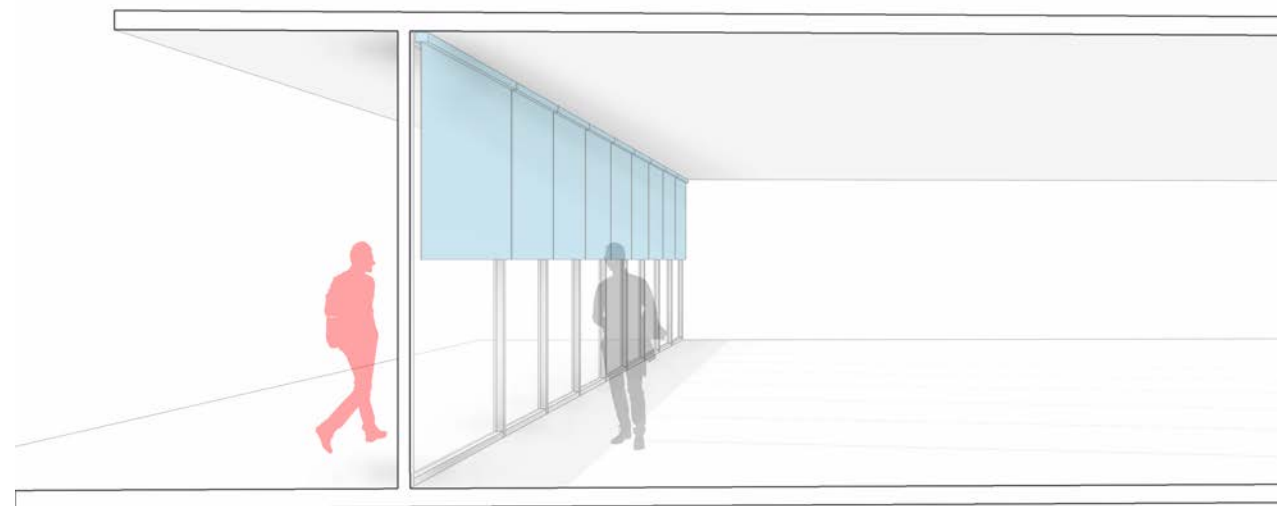




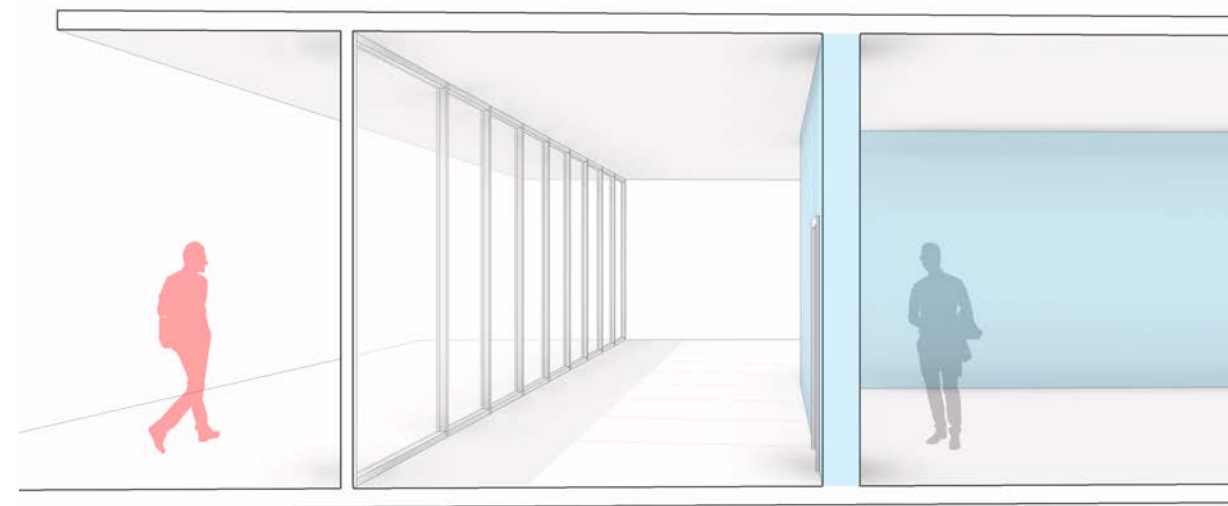
Motorized black out blinds could be added and tied to the campus alert system.



Solid partitions could be added to prevent views in. The downside of this approach is the loss of visual connection key to helping develop strong networks.



Translucent films could be provided up to eye level for a more permanent privacy.



Secure lockable shelter zones could be placed in significant areas of each building with clear signage identifying their purpose.



**Information
Services
Strategic
Plan**

July 2016

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Executive Summary

The Information Services (IS) strategic plan incorporates input from a broad range of campus stakeholders and ties the Information Services current and future initiatives and projects with the college's goals and objectives.

The IS strategic plan for Linn-Benton Community College has a primary audience of the faculty, students, and staff (including the IS department) of the college. The strategic plan is intended to show the priority, direction, and roadmap that Information Services will be following. The plan shows the department's sensitivity and alignment with the overall mission and values of the institution.

As part of the development of a long-range technology strategic plan to guide the college's investment in technology infrastructure, Information Services has worked with an outside consulting firm to make a management-focused assessment of the status and direction for information technology at Linn-Benton Community College. This assessment has provided insight into how the organization compares to its peers, and includes specific recommendations for improvement and the implementation of best practices learned from working with colleges of similar size and focus. It is included as *Appendix M: IT Strategic Assessment and Roadmap*.

This initial assessment provided the foundation for a comprehensive technology planning document, incorporating a more detailed review of the current technology environment at LBCC (staff, funding, network, equipment). In addition, a detailed description of the committees and governance of Information Services is included along with a description of the major Information Technology (IT) projects and development work.

A Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis section is used to provide a structured look at some of the positive and negative characteristics of Information Technology at the enterprise level and to synthesize alternative plans and strategies. The ultimate goal of the document is to:

- Guide the college's investment in technology infrastructure.
- Ensure that the college is providing essential technology to support both instruction and administrative needs.
- Identify areas where improvements can be made.

At the conclusion there are some specific recommendations for the future of Information Services at Linn-Benton Community College.

The CIO's Vision

A tourist, watching some native ceremonies in the American southwest, asked about the effectiveness of the “rain dance,” seeing it had no immediate effect on the weather. The wise tribal leader replied that while it didn’t always bring better weather, it did “make them better dancers.” A discussion of the usefulness of a strategic plan for the rapidly evolving world of information technology has to start with the premise that thinking and planning for an unknown future will have little effect on that future. Instead, we can be confident that we will be better thinkers and planners for our efforts.

It also helps to have a solid understanding of the past world of information technology in higher education. A recent article in the *Educause Review*, entitled “Riding the Wave in Higher Education.” described the evolution of technology in this manner: “*Looking at the vast ocean that is modern day computing, we can see that major developments come in waves. The arrival of mainframe computers in the 1960’s generated the first wave (one computer for many people), followed in the late 1970’s by personal computers in the second wave (one computer for one person). In 1988, Mark Weisser presciently observed that computers in everyday objects, objects all around us, were forming the third wave – what he called ubiquitous computing (many computers for one person). A decade later in 1999, Kevin Ashton put forth the idea behind, and coined the term for, the fourth wave: the internet of Things.*” (July/August 2016 *Educause Review*, Page 11)

It is even possible to go one step further and use the term “the internet of EVERYthing.” We all carry computers, communicate via computers, ride in computer enabled cars and planes, transact commerce through computers, entertain ourselves with computers, have computers monitoring and maintaining our health, and in some cases have computers inside of us. We expect constant connectivity, unfettered access, and simplicity of operation from all devices that we use.

For the most part, our expectations are met, but when we examine the cause of some dissatisfactions we can see that our decisions, which may have been historically sound, are creating obstacles to our smooth advancement and adoption of the resources and technologies that offer so much more. Examples would be how past Banner modifications have hampered implementation of new Banner features, or how the decision to use multi-mode fiber in our campus network hinders the use of faster backbone speeds.

This report examines how steps are being taken to remove some of those obstacles and clear room for new opportunity by reconsidering our structures and processes and considering how IT can positively impact the goals of the college. Whether we are accurate in our evaluation of the future of information technology at LBCC or not, the exercise will make us better dancers.

*Michael Quiner, CIO, Linn-Benton
Community College Albany, Oregon,
July 2016*

Linn-Benton's Mission, Values, and Strategic Goals

One of the purposes of the Information Services strategic plan is to clearly align the department's roadmap with the mission, values, and goals of Linn-Benton Community College. As a prelude, the College's guiding statement and principles are included here:

The Mission of Linn-Benton Community College:

To engage in an education that enables all of us to participate in, contribute to, and benefit from the cultural richness and economic vitality of our communities.

Our Values:

At Linn-Benton Community College, our values serve as the foundation that inspires our actions and unites us as a community. As responsible stewards, we are committed to:

- Opportunity: We support the fulfillment of potential in ourselves and each other.
- Excellence: We aspire to the highest ideal with honesty and integrity.
- Inclusiveness: We honor and embrace the uniqueness of every individual, and promote the free and civil expression of ideas, perspectives, and cultures.
- Learning: We commit to the lifelong pursuit of knowledge, skills, and abilities to improve our lives and our communities.
- Engagement: We openly and actively connect as students, faculty, staff, and community.

The Strategic Goals of the College are:

- Productivity: Increase completion by 50%
- Equity: Completion is demographically representative of District
- Quality: Completion demonstrates capacity to better one's life and contribute back to our community

A complete list of the current year's strategic objectives is in *Appendix A: College and President's Strategic Objectives 2015 – 2016*. This technology master planning report is intended to not only meet the specific stated objectives in that document, but also to align all technology-related strategic objectives to one of the three strategic goals of the college. In addition, all projects and initiatives in our current portfolio or roadmap map to these three college goals and will be coordinated with the specific college council responsible for guiding and measuring progress toward that goal.

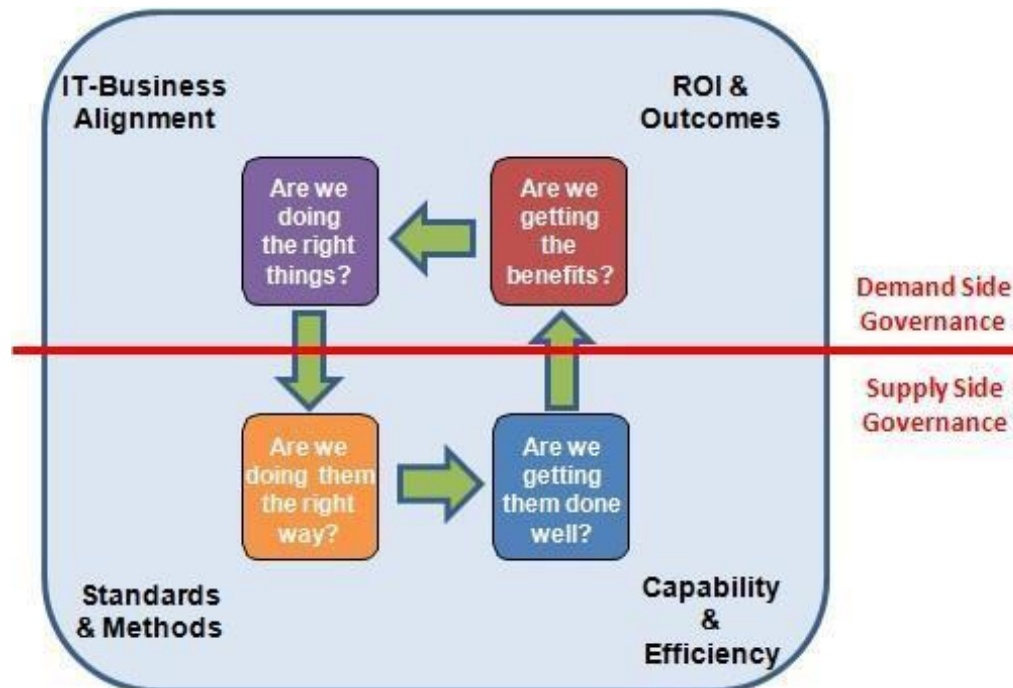
LBCC Information Technology Governance Model

Gartner defines “IT governance as the processes that ensure the effective and efficient use of IT in enabling an organization to achieve its goals.” Gartner makes two distinctions in IT governance:

- IT demand governance (WHAT IT should work on) is the process by which organizations ensure the effective evaluation, selection, prioritization, and funding of competing IT investments; oversee their implementation; and extract (measurable) business benefits. IT demand governance is an investment decision-making and oversight process, and it is an executive leadership responsibility.
- IT supply-side governance (HOW IT should do what it does) is concerned with ensuring that the IT organization operates in an effective, efficient and compliant fashion, and it is primarily a CIO responsibility.

The same concept is defined by MIT’s Center for Information Systems Research as “...a framework for decision rights and accountability to encourage desirable behavior in the use of IT. This definition distinguishes governance from IT management. IT management is the daily decision making and implementation activities around the use of IT. Governance identifies who will make key IT decisions and how will they be held accountable.”

A good visualization of this is:



This illustrates the four “Are” questions that should be asked:

1. Are we doing the right things?
2. Are we doing them the right way?
3. Are we getting them done well?
4. Are we getting the expected benefits?

The core of effective IT governance is actually the accountability system which defines the responsibilities for results that must be delivered as a result of the decisions.

These decisions occur in the top half of the diagram where the focus is on deciding what the IT priorities will be and what accountability system is required to demonstrate the intended benefits have been achieved.

Demand side governance focuses on IT decisions and project prioritization to maximize strategic value. Demand side governance is focused on what IT will work on and what criteria is best for evaluating IT accomplishments. A governance committee usually fulfills the role of demand management. While operations and maintenance support demands usually consume the majority of IT capacity, most committees are focused on the project-related demands and are not actively managing the demand for operations and maintenance. However, gaining control of the operations and maintenance demand is essential to freeing up capacity for strategic projects. That is why the IT governance committees should track all IT demand so they have visibility into the operations and maintenance demand as part of regular IT performance reporting. The IT management team does all the work required of demand side management so that the technology committee simply has to evaluate the information and recommendations and make decisions.

Supply side governance focuses on allocating resources, IT staff, and technology, to the approved portfolio of work, organizational priorities, and achieving the expected value of the IT operations and projects. Supply side governance is the responsibility of IT management. This includes the workload management processes and managing the technology portfolio in a sustainable manner such that operations and maintenance demands can be minimized. IT management is also responsible for optimizing the resources (human and technical) for maximum capacity and flexibility while also optimizing the processes and IT services for effectiveness and efficiency.

There are several groups or committees that are comprised of both Information Services staff and other campus stakeholders. These groups meet regularly with the goal of collecting input, discussing technology initiatives, and helping to prioritize technology projects to align them with campus objectives.

The Information Technology Governance Committee (ITGC): Referred to in the past as the Technology Innovation Council (TIC). This Committee consists of the college executive leadership from operational, student services, academic areas, and student leadership. They meet with the Information Services leadership to coordinate the recommendations from sub groups and committees. This group ensures that efforts to improve the technology infrastructure and environment on campus match with the strategic objectives of the college, that sufficient resources are provided to meet the stated goals, and to help information services ensure accountability and transparency to the college community. Refer to *Appendix B: Information Technology Governance Committee (ITGC) Charter*.

Mission of the ITGC:

The prime objective of the ITGC is to make decisions to ensure IT investments align with the College's strategic goals and objectives. The Committee is responsible for approving and prioritizing strategic IT initiatives across the institution.

The ITGC provides guidance and input to IT Advisory committees (Administrative Systems Steering Committee, Web Strategies Committee, IT Security Group, Infrastructure Planning Group, Technology Fee Faculty Committee)

The ITGC also has a goal of coordinating technology themed communication across the campus community in order to facilitate focused and efficient governance.

The ITGC is charged with maintaining a broad awareness of the IT environment internally and externally, in order to reduce duplication of effort, consolidating resources, fostering innovation, and scaling up solutions that have broad appeal or usefulness.

The ITGC acts as the primary sponsor to present recommendations regarding IT infrastructure, systems, and policy to the campus, and Board members.

In addition, the ITGC acts as a sounding board for the campus on the impact and implications of executive decision making.

Responsibilities of the ITGC:

- Oversee the IT roadmap and IT investments. Set approval guidelines for IT investments.
- Define the desired portfolio mix: run/operational/initiatives and academic/administrative/core IT. Monitor and adjust to meet the college's needs and priorities.
- Recommend IT budget priorities, as well as use of other funds, for IT priorities. Review and report on institutional IT budget and spend.
- Monitor benefits realized by current and completed IT projects. Approve and

- report on institutional IT metrics.
- Approve and monitor and approve exceptions to IT standards and policies, in consultation with IT Leadership.

The Sub-committees that are guided by and report up to the Information Technology Governance Committee are:

The Administrative Systems Steering Committee (ASSC): Comprised of the Banner support staff and functional and operational experts from the various administrative offices, i.e., student services, financial aid, registration, human resource, and the finance office. This group works to plan upgrades and improvements to the campus ERP system.

The Web Strategies Group: Includes representatives from student services and admissions, instructional departments, the library, college advancement, and the Information Services web team. They work together to discuss campus web improvements and plan the future of the college web presence. See *Appendix C: Web Strategy Committee Charter*.

The IT Security Group: A collection of networking technology, desktop support, enterprise technology, and media support staff that evaluate IT security risks and develop infrastructure and policy remedies.

The Technology Fee Faculty Committee: There is an annual process to review and prioritize spending from the student technology fee fund. Requests are accepted from any department after approval by the division dean. Faculty meet with Information Services and Media staff to review, evaluate, and prioritize requests.

The Infrastructure Planning Group: Including representatives from instructional departments and administrative offices, as well as networking and support staff. This group works to ensure that the college has the proper infrastructure in place and a plan to address future needs in the areas of network capacity, bandwidth, workstation computing, and telecommunications systems.

The Budget Team: Not a sub-committee of the ITG, but a vital partner and resource for all institution-wide technology planning. All proposals for budget increases, one-time investments, or requests for strategic funds are reviewed by the president's budget team for feedback, prioritization, and funding. Many of these proposals involve using technology to enhance services. When technology is a component of the request, information services is consulted and involved in the review and decision.

The Technology Environment at LBCC

The People

Information Services has a staff of 32 people comprised of the CIO, two department secretaries, and the rest working in five operational teams.

There are seven individuals in the banner support team – a manager, a system administrator, three application analysts, a support specialist, and a computer operator.

There are four individuals in the network support team – a manager and three network support staff.

There are two individuals in the web support team – a web architect and a web application developer.

There are nine individuals in the PC/Desktop support team – a director, four computer support specialists, three lab support staff, and a telecommunications support person.

There are seven individuals in the eLearning/Media team – a director, three media support specialists, two learning management support analysts, and an applications developer.

In the summer of 2015, 3,500 institutions were invited to contribute data to the Educause Core Data Service (CDS) survey. Comparison data used in this report is based on the reported numbers from the 148 associate institutions that participated in the study, as well as some publicly available data from the Integrated Postsecondary Education Data System (IPEDS). Reported statistics are either an estimated proportion of the population or an estimated median (rather than a mean).

The Educause CDS survey for 2015 gives a median of four percent of IT staff as a percentage of institutional employees. In addition, the CDS provides a metric of six percent IT student worker as a percentage of total IT staff. Linn-Benton Information Services is slightly below the median in both measures with 3.6 percent of the college staff being in the Information Services department (32 IS Staff/891 LBCC Employees) and zero (zero percent) student workers. Bringing the staffing level to the median would require expanding the Technology staff by 3.5 people. In a second metric, the CDS reports that the median staffing for IT is 5.22 percent for every 1,000 student FTE. With Linn-Benton Community College reported FTE of 6,127 the Information Services department is staffed at the median level for our student population.

Gender and diversity in the Information Services department is not comparable to proportions in the rest of LBCC, with females comprising 28 percent of the department while the campus contracted staff pool is 59 percent female. Diversity, if measured in terms of ethnic minorities, is zero for the department. In order to support the campus equity goal, all new hires will need to be

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considered with a diversity rubric. Nearly a third of the staff have been hired in the last two years and a similar third have been with the college for more than 15 years. The expected tenure of IS

staff and the potential for reorganization will be explored in the SWOT analysis section below. The organization of department staff can be seen below:

Information Services Organizational Structure

| | | | | |
|-----------------------|---------------------------------|------------------------|--------------------|------------------------|
| | Information Services | | | |
| | CIO - Michael Quiner | | | |
| | Secretary - Lena Spencer | | | |
| | | | | |
| Banner Support | PC Support | Network Support | Web Support | ELearning/Media |
| Manager: | Manager: | Manager: | Manager: | Manager: |
| Gabriel Williams | Russ Rinker | Vern Smith | Jonathan Pedersen | Steve Smith |
| | | | | |
| Contracted | Contracted | Contracted | Contracted | Contracted |
| Kimmy Dammon | Leighana Coe | Kim Boone | Daniel Williams | Eric Bryant |
| Marc Haerling | Drew Corkrey | Michael Dowless | | Whit Hamilton |
| Tyler Lafferty | Shelly Ellingson | Dave Smith | | Kimberly Koplien |
| Teresa Patterson | Jack Giles | | | Ken Long |
| Lorrie Peterson | Steve Gribble | | | Lori Rowton |
| Carl Rhodes | Alf Price | | | Paul Tannahill |
| | Sheena Schrock | | | Tommy Parker |
| | Lance Search de Lopez | | | |

The Funding

Information Services is funded at Linn-Benton Community College at approximately \$4,095,572 per year. Funding comes from a variety of general fund accounts, revenue generating funds, and two reserve funds as follows:

General Budget Funds – Four funds of \$3,096,682, or 75.5 percent of total IS funding.

Revenue Funds – Three funds which bring in additional fees from students and bandwidth licensing for \$552,981 or 13.5 percent of total IS funding.

Reserve Funds – Two funds which are funded at \$445,910 annually, or 10.9 percent of total IS funding.

There are a few (five) additional grants and small revenue funds that are either temporary in nature, such as the state Open Education Resource (OER) grant, or do not generate revenue that significantly impact the funding, such as the student pay-to-print account.

The Educause CDS Survey for 2015, as described above, gives a median of 51 percent of IT funding spent on compensation and the remainder (49 percent) spent on materials, services and capital expenditures among comparative institutions. An analysis of our spending shows 72.86 percent of our annual budget spent on compensation (this includes benefits) and only 27.14 percent spent on all other IT needs.

The survey also provides a metric of \$688 spent annually for IT for every student FTE. With Linn-Benton Community College reported FTE of 6,127, the Information Services department is currently spending \$668 per student FTE. The college charges students a technology fee of four dollars per credit hour and a distance learning fee of five dollars per credit in a distance learning course.

The per credit technology fee is assessed according to our Administrative Rule No. 7055-04. A portion of the technology fee is used for technology updates that directly impact current students. Technology fee funds are used for the purchase of classroom media equipment, the learning management system, and some salaries. The guiding principle is that this is spent for instructional support that directly impacts current students. Requests are made during the annual budget development process and reviewed by the college leadership for appropriateness. The requests are then forwarded to the technology fee committee for final review. The technology fee committee is a representative group of faculty and college leadership and is chaired by the director of eLearning/Media Services. Other revenue funds do not have a similar allocation process.

Linn-Benton Community College dedicates a portion of its funding towards a technology reserve fund. The purpose of the reserve fund is to purchase new, or repair, or replace existing IT equipment. It is also used for the purchase of software and services. The use of the reserve funds



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is determined through a forecasting and budgeting processes, beginning with analysis from the

Information Services (IS) staff, who provide input and follow the guidelines of the information technology update plan. The annual budgeting and spending plans are reviewed by the technology advisory groups and committees. A rolling three year projection which considers all college needs and priorities is maintained. Currently LBCC earmarks approximately \$500,000 per year for the technology reserve fund, but the budget committee and Information Services reviews the adequacy of that funding level regularly and will make adjustments as facilities and technologies expand.

Besides the replacement and upkeep of existing equipment, requests are made for new technology resources during the annual budget development process and reviewed by the college leadership for appropriateness. The requests are then forwarded to the Tech Fee committee for final review.

Additional budget data can be seen below. It should be noted that the Materials and Services (M&S) budgets have remained flat for several years in spite of increasing licensing and services costs. The potential to restructure the current funding model is explored in the SWOT analysis section below.

Information Services Historic Budgets

| Information Services Fund | 2012 | 2013 | 2014 | 2015 | 2016 |
|---|--------------------|--------------------|--------------------|--------------------|--------------------|
| College Computer Services | \$1,881,376 | \$1,914,871 | \$1,919,928 | \$1,995,324 | \$2,057,599 |
| Communication Services | \$ 241,614 | \$ 246,594 | \$ 250,155 | \$ 252,550 | \$ 246,116 |
| Instructional Computing Services | \$ 328,134 | \$ 332,483 | \$ 348,961 | \$ 350,431 | \$ 350,541 |
| Media Services | \$ 486,264 | \$ 568,859 | \$ 573,335 | \$ 570,282 | \$ 547,636 |
| Technology Fee | \$ 415,361 | \$ 387,952 | \$ 365,792 | \$ 360,390 | \$ 596,054 |
| Distance Learning Fee | \$ 71,015 | \$ 73,965 | \$ 78,975 | \$ 76,385 | \$ 80,435 |
| Interactive TV Fee | \$ 12,870 | \$ 13,680 | \$ 13,680 | \$ 13,680 | \$ 198,545 |
| Telecomm Reserve | \$ 3,444 | \$ 3,453 | \$ 4,983 | \$ 5,174 | \$ 5,565 |
| Technology Reserve | \$ 446,224 | \$ 460,888 | \$ 453,949 | \$ 454,138 | \$ 510,313 |
| Material and Services Budget | \$ 421,395 | \$ 400,488 | \$ 450,488 | \$ 450,488 | \$ 450,488 |
| Total IS Budget | \$1,370,309 | \$1,340,426 | \$1,367,867 | \$1,360,255 | \$1,841,400 |

The Network: Wide Area

Linn-Benton Community College’s service district covers two different counties in the central Willamette Valley of Oregon, Linn and Benton Counties. Because of this wide geographic area the college has several centers:

Albany campus in Albany, Oregon

Advanced Transportation Technology Center (ATTC) in Lebanon, Oregon

East Linn Center in Lebanon, Oregon

Benton Center in Corvallis, Oregon

Sweet Home Center in Sweet Home, Oregon

Broadband networking is provided to most of the centers via Comcast business internet services, with the exceptions of the Albany campus and the Benton Center that are provided bandwidth and direct internet connectivity through the Network for Education and Research in Oregon (NERO) and the University of Oregon. The ATTC also receives direct internet access through PEAK Internet. The table below list our current bandwidth at each center

| Location | Provider | Bandwidth | Coverage |
|------------------------------------|-----------------------------------|---|---|
| <i>Albany & Benton Center</i> | <i>NERO(University of Oregon)</i> | <i>1 gbps peering &100 mbps transit</i> | <i>Internet Access</i> |
| <i>Albany For East Linn Center</i> | <i>Comcast</i> | <i>100/20 mbps</i> | <i>Business Internet Deluxe with 5 Static IPs</i> |
| <i>Student WIFI, Albany Campus</i> | <i>Comcast</i> | <i>150/20 mbps</i> | <i>Internet Deluxe 150 w/1 Static IP</i> |
| <i>ELCI, Albany Campus</i> | <i>Comcast</i> | <i>50 mbps</i> | <i>Business Internet Starter w/ 1 Static IP</i> |
| <i>Student WIFI, Benton Center</i> | <i>Comcast</i> | <i>150/20 mbps</i> | <i>Business Internet Premium w/ 5 Static IPs</i> |
| <i>East Linn Center</i> | <i>Comcast</i> | <i>150/20 mbps</i> | <i>Business Internet Premium w/ 5 Static IPs</i> |
| <i>Sweet Home Center</i> | <i>Comcast</i> | <i>50 mbps</i> | <i>Business Internet Premium w/ 1 Static IP</i> |
| <i>Horse Center</i> | <i>Comcast</i> | <i>50 mbps</i> | <i>Business Internet Standard</i> |
| <i>Health Occupation Center</i> | <i>Comcast</i> | <i>50 mbps</i> | <i>Business Internet Standard</i> |
| <i>ATTC Center</i> | <i>Peak Internet</i> | <i>50 mbps</i> | <i>Direct Internet Access</i> |

All of the centers are single facility campuses, except for the Albany campus which is a 22 building campus. A recent bond measure has financed the expansion of the campus. The ATTC is adding two new buildings (Heavy Machinery and the Innovation Building). The Benton Center is adding a secondary building and a new Health Care Occupations Center (HOC) is being constructed in Lebanon, Oregon. The need, in light of these expansions, for additional



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bandwidth to remote centers will be explored in the SWOT analysis section below.

The Network: Albany Campus

The 22 buildings in the Albany campus are connected via multi-mode fiber and the campus local area network is running at 1Gbps (Gigabit per second). The college network uses Hewlett Packard Procurve Enterprise network switches for routing and Ethernet connectivity. The college saves large amounts of money by purchasing Hewlett Packard network switches that are one or two generations old through the used market. The lifetime warranty on Procurve switches means that there is little risk to this approach, since anything that doesn't work perfectly gets replaced for free. Increasing the bandwidth between buildings to 10Gbps will be considered in the SWOT analysis section below.

Besides the wired network there is wireless connectivity available throughout all the centers. We have over 82 Ruckus access points for wireless that have been in place for a year providing 802.11ac connectivity. The 802.11ac connections provide better compatibility, speed, and range than earlier wireless standards. There are two wireless networks on campus; LBCC, which is an open (requires no authentication) network, and S-LBCC, which is a secure network (requires authentication) and allows access to on-campus resources.

LBCC has 14 physical server, one each in the Benton Center, the ATTC, the Sweet Home Center, and the East Linn (Lebanon) Center. The other ten physical servers are located in the Albany campus datacenter. Nine of the servers are VMWare hosts (ESX servers) or physical servers that have sufficient resources in the form of memory and processors to house virtual servers. The college houses 83 virtual servers on their ESX hosts. There is an inventory of physical and virtual servers in *Appendix D: Information Services Server Inventory*. With 94 percent of our servers virtualized, network services is in a good position to explore desktop virtualization (VDI) and cloud services as explored in the SWOT analysis section below.

The datacenter provides three tiers of storage on a Dell Compellent SC4020 SAN (Storage Area Network):

Tier One : Six - 200 Gigabyte Solid State Drives

Tier Two: Six - One Terabyte 10K rpm hard drives

Tier Three: Twelve - Four Terabyte 7.2K RPM hard drives

The earlier tiers of storage provide faster access with less capacity. The Tier One and Tier Two hard drives are located in the primary unit of the SAN (on shelf one), and the Tier Three hard drives are in the second shelf (an SC200 unit). There is a total of 46 terabytes of usable network storage space. Currently, 27 terabytes are being used in production, and we have roughly 18 terabytes, or 39 percent, of our storage available. The total Input/Output Operations Per Second (IOPS) for all three tiers is 19,220 IOPS. *Appendix E: Information Services Network Diagrams* has some valuable illustrations of the network structure and VSphere (virtual server) configurations.

All data stored on campus is maintained and preserved by following these policies:

- Nightly (Monday thru Sunday) incremental backups are performed of all critical physical and virtual servers to disk.
- Virtual servers are replicated (Monday thru Friday) to the Benton Center ESX host. Those replications (restore points) are stored for seven days and then aged out.
- Full backup of all critical physical and virtual servers to disk once a week (Friday/Saturday).
- Weekly (Sunday) backup to tapes of Saturday full disk backups.
- Backups on disk are retained for 14 days.
- Tape backups are retained in our tape rotation for one year. The rotation is as follows:
 1. After full backup to tape, tapes are stored in Takena Hall vault.
 2. The following week one set of tapes are moved to the HR vault and retained for a year.
 3. A second set of tapes are taken off site to a Safe Deposit Box.
 4. The following week the tapes are brought back from the Safe Deposit Box and moved to the NSH safe.
 5. The following week the tapes are rotated back for reuse.

Additionally, through a reciprocal support agreement, a server is located at Central Oregon Community College in Bend, Oregon, and our college transactional enterprise resource planning (ERP) data is copied to it nightly as a component of our disaster recovery plan.

The Desktop Hardware

Our most current inventory shows a total of 2,310 personal computer systems in use at our several college centers. One thousand three hundred and twenty-five (1,325) of these units are available for students and instructors in 68 labs, the library, and 27 other instructional spaces. Refer to *Appendix F: Computers in Instructional Space & Labs*. Fifty-seven point three (57.3) percent are available to the students, and 180 of the student computers are laptops or tablets. There are 139 computers in media enabled lecterns. We have 985 computers in use by our 891 faculty and staff, further proving the point that the model of “one computer for one person” is no longer valid.

The college has 214 laser printers on the various campuses. Of these, 27 laser printers are located in labs, the library, or other instructional spaces. These machines are supported, maintained and supplied through a managed service account. Printing to these public printers is charged back to the student or to the department that required the student to print. The remaining 187 laser printers are located in departmental or private offices and are supported and maintained by the Information Services support team. All supplies are charged back to the department.

We currently have 237 units in use that we have identified as non-supported. That generally indicates that the college spent money to replace a particular machine but the department or program asked that the old machine be left with them as an added resource with the understanding that we would not be replacing it or maintaining that system in the future. We have 2,073 supported desktop and laptop computers of varying vintages. The following chart shows the age, count and percentage of our supported inventory:

| Year Purchased | Count | Percent |
|-----------------|--------------|-------------|
| 2015 | 80 | 3.86% |
| 2014 | 195 | 9.41% |
| 2013 | 72 | 3.47% |
| 2012 | 362 | 17.46% |
| 2011 | 359 | 17.32% |
| 2010 | 439 | 21.18% |
| 2009 | 136 | 6.56% |
| 2008 | 237 | 11.43% |
| 2007 | 77 | 3.71% |
| 2006 or earlier | 116 | 5.60% |
| Total | 2,073 | 100% |

This indicates that 65.80 percent of our supported units are over five years or older, and 9.51 percent were purchased over a decade ago. If all machines over five years or older were to be

replaced at \$650 per machine it would require \$886,600 in one year. In addition, the current Information Services support staff would not be able to replace 1,364 machines in a single year. To replace 20 percent of the inventory every year thereafter will mean 415 systems replaced at a projected cost of \$269,469 annually. Strategies to manage this unsustainable upgrade schedule and inventory are explored in the SWOT analysis section below.

Instructional and Administrative Support

Information Services provides support for faculty and students through the following instructional services:

- Classroom media equipment
- Distance and distributed learning services
- Web project design and development
- Faculty instruction and training
- Media materials preview and acquisition
- Multimedia production and duplication
- Video engineering, production and technical services

LBCC provides an email address for every registered student and access to Google Apps for Education which include Google drive, calendar, and applications. All staff and faculty have Gmail and access to Google Apps for Education. Training for employees on email and calendaring includes in-person classes, short videos available on demand and one-on-one consultation. During the twice annual in-service days, the technology department offers training sessions on technologies, internet security, and google applications for all faculty and staff.

Information Services provides a number of desktop and online software applications to support the educational mission of the college. The enterprise information system, Banner, is the core source for institutional data, as well as for the management of institutional identities for authentication. As such, it is the primary gateway to a variety of online student resources such as AdvisorTrac, Scheduler, Degree Runner (a degree evaluation tool that is in the process of being deployed), as well as registration, financial aid, billing and payment. Faculty and students use both Moodlerooms and Canvas learning management systems (LMS) for over 400 online, hybrid and in-class course sections.

Faculty are offered a Moodle Basic Training (MBT) course which helps prepare them for using Moodlerooms as a component of their instruction. Staff are given an initial tutorial on the Banner system. Additionally, the Banner support team provides monthly “Banner Bunch” sessions to give continued training on common used features and new updates to the campus enterprise system users. The web team provides similar themed training in monthly “Web Box” sessions for staff and faculty that manage web content for their department or program.

In addition, Information Services gives technical support and assistance for personal computer use, e-mail and shared calendaring, network and Internet access, telephone and voice mail, and

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the Banner ERP. Distance Education and Media Services maintain a small faculty computer lab for training on classroom presentation equipment, Moodlerooms and Canvas LMS.

Student support is provided through staffed computer labs at each site. The Library and Information Services collaborate on providing extended hours staffing of the student help desk in the Library at the Albany campus. The “Destination Graduation” course, which is required for new incoming students during their first term, includes instructions on using Moodlerooms, the student help desk, and student email. Students are required to use these resources during the class to prepare them for using these technology resources in future courses. The course also covers library resources, advising, financial aid, and a graduation checklist.

Information Services reviews the standard workstation hardware and software configuration each year in consultation with academic departments. They also evaluate the campus desktop workstations for adequate performance and usability compared to the designated use-case of each workstation. Student lab, faculty, and staff desktop computers are evaluated and upgraded or replaced as needed. The college schedules replacements and upgrades so that the expenditures for new equipment and the workload for updates are about equal throughout the year and from year to year. Upgrades to memory, solid state drives (SSD), networking technology, and operating systems have made it possible to extend the lifecycle of equipment. Servers, switches, uninterruptible power supplies (UPS) devices, wireless access points, and other network technology are replaced as needed. Classroom technology is also on a replacement cycle depending on the life-cycle of the specific equipment. The college has been upgrading the campus telephone system to Voice over IP (VoIP), with only the East Linn Lebanon center remaining still to be upgraded.

The team of Banner application analysts and developers works with the administrative staff of the college, including, but not limited to Student Services, Admissions, Registration, Financial Aid, Human Resources, Accounts Receivable and Finance. They support these offices with one-on-one troubleshooting and training as well as providing access to outside resources and consultants. The Banner team currently has a backlog of 78 CSR’s (Change Requests) to address bugs, process problems, or requested modifications. See *Appendix G: Banner Change Request (CSR) Log*.

Information Services Projects

Every team and workgroup in Information Services has a portfolio of projects that they are actively pursuing. Some of them are short term projects that need to be completed in a relatively quick fashion, such as our campus upgrade to Windows 10. Others are longer term and are expected to take several years, such as the Ellucian DegreeWorks deployment. Some projects are in the final stages, such as our VoIP conversion, with only one facility left to change, while other projects, such as virtual desktops (VDI) are only in the pilot stages. A full list of the project roadmap can be seen in *Appendix H: Information Services Projects*. Details of a few high priority and highly important projects are summarized below.

Banner Baseline Project: The Banner baseline project is to move the college Banner environment to a baseline version as currently delivered by Ellucian by June 30th, 2017. Specifically, this is the removal of all modifications, net new, and enhancements (inventoried at over 2,000) by the end of the project or have a clear plan in place to remove any non-baseline code still in use at June 30th, 2017. Fifty percent of the time of our current three Banner analysis is needed over the next year to complete this project in the set time. See *Appendix I: Banner Baseline project Charter*.

DegreeWorks: Information Services was able to negotiate and work with Ellucian to dramatically reduce the cost of three software packages by 54 percent for the initial licensing and 52 percent for software maintenance over the next five years. This has saved the college nearly \$300,000 (half immediately, and the remainder over the next five years) on the purchase of Ellucian Mobile, DegreeWorks (a comprehensive academic advising, transfer articulation, and degree audit tool that improves student completion and academic planning), and a data storage and reporting tool.

The DegreeWorks project will implement a degree audit system by fall 2018 to function as a student planning, advising, degree audit, and reporting tool. It will provide the following:

- decrease time-to-degree
- more efficient certification of degree
- paperless advising and degree audit process
- the ability to anticipate course demands

DegreeWorks uses Banner academic history and degree audit data to enhance the advising process for students, faculty, advisors, and staff. It simultaneously builds data structures to supporting future academic planning, course work demand analysis, and curricular planning. DegreeWorks extracts academic history from Banner, filters it, and stores relevant data in a repository for audit data. DegreeWorks retains a chronological academic history for each student, and applies their data to graduation requirements using the results to certify progress toward degree completion. With this data students can see where they stand in their progress toward anticipated graduations, while receiving recommendations about class registrations for all unfulfilled requirements. Students can save proposed or potential registration plans which the college will use as tools for anticipating course work demand for future terms.

Ellucian Mobile: This allows students, faculty, and staff to access the resources available in Banner through a mobile interface for accessing

course listings

schedules

registration

grades

class rosters

account's and holds

DegreeWorks audits and planning tools

Banner 9 (also known as Banner XE): Currently the college is running Banner 8. This version of the Banner software relies on the use of the third party provided Oracle Forms and Reports. Ellucian has announced that they will discontinue support of Banner 8 on December 31, 2018. Oracle has announced that there will be an additional charge for Oracle forms and reports starting on May 31, 2018 of 20 percent of our annual licensing (it will come to approximately \$6,000 a year). It is dependent on a quick and efficient completion of the Banner Baseline project so that the college can begin the upgrade to Banner 9 before incurring additional support charges from Oracle, and eventually losing support of Banner 8 altogether.

WebForm Consolidation and Workflow: Updating the current installed version of Laserfiche (a document scanning and archival system currently deployed on campus) to the new version addressed three areas that were lacking in the campus document management processes.

fillable and routable digital (web) forms

workflow rules to route forms and other documents to appropriate parties for approval and action

Banner forms integrated with document repositories for quick reference lookup

These three additional capabilities of digital forms, workflow, and Banner integration provide three major benefits:

Students will be able to complete more of the administrative chores required to completing their education without making physical trips to administrative offices to collect and return paper forms.

College staff will be able to spend less time auditing, correcting, and managing paper forms and more time serving students.

Integration with Banner information will ensure data integrity and completeness as forms are populated with the correct student information.



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According to the Gartner research group 85 percent of transactional processes are initiated by a form, and nearly 40 percent of those are incomplete or require manual correction. The software has been updated and staff are being trained and starting to enhance and modify the over 200 forms available through the campus web pages and on paper.

Distance Learning: For Linn-Benton, a successful traditional distance learning program will increase completion rates in courses to be equal to, or better than, the equivalent face-to-face courses. Currently, the completion rates for the lowest performing distance education courses are nine percent to 30 percent lower than the equivalent traditional courses. Our college distance learning courses in general have a lower rate. Six hundred and eighty-seven more students at Linn-Benton would have completed 2404.5 credits for a savings of \$240,450 in the last three years if distance learning completion rates were on the same level of on-campus completion rates.

The average distance learning FTE at the other 16 Oregon community colleges is 20 percent of their total student FTE. Currently LBCC FTE for distance education is only six percent of our total FTE and has been flat at that rate for the last four years.

The first phase of a strategic initiative would focus on completion, then the second phase will deal with enrollment growth, in keeping with our institutional goal of quality (or completion). A completion committee of faculty, staff (from admissions, curriculum, Banner, testing, IR), and deans will develop a set of holistic strategies and policies to improve completion. They will focus on providing students with a good fit, strong instructor presence, and strong institutional support. The complete strategic initiative can be read in *Appendix J: Distance Learning Strategic Initiative*.

Bond Construction: There are currently five bond financed construction projects currently underway or in the early planning stages:

- Lebanon ATTC Innovation Center – to be completed Fall 2016
- Lebanon Heavy Equipment Center – to be completed Winter 2016
- Lebanon Health Care Occupation Center – to be completed Spring 2017
- Corvallis Benton Center Expansion – beginning Summer 2017
- Albany Campus Renovation – beginning Summer 2017

While these bond project are not overseen by Information Services there are large issues that involve IS and involve significant human and financial resources, such as providing bandwidth to the new buildings, internal network and wireless infrastructure, telecommunications equipment, desktops, and instructional and media equipment.

Identity Management/SSO: The Identity Management project will implement a system that defines what people (students, staff, faculty, and guests) can do on the campus network based on their roles and access rights.

Identity management will increase security, while decreasing cost and redundant effort. LBCC has many complex systems requiring manual administration of users and access, causing much duplication of effort by staff and extra work for users who have to maintain unique access credentials to many different systems.

The identity management system will solve this issue for users and administrators, while allowing easier deployment of new campus systems, such as mobile applications, one-card, or a web portal. An identity management system provides the following benefits:

- strong authentication
- activity tracking
- audited guest access
- immediate enablement and onboarding
role management and change
workflow
- de-provisioning of inactive accounts
- reduce sign-on and eventually single sign-on (SSO)
- self-service for password management
- decentralized management of identities

Strengths, Weaknesses, Opportunities, and Threats

This Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis section is used to look at some of the positive and negative characteristics of Information Technology at a high level, and to consider alternative plans and strategies that might mitigate weaknesses and risks and capitalize on developing opportunities. As mentioned at the beginning, the ultimate goal of the document is to:

- Guide the college's investment in technology infrastructure.
- Ensure that the college is providing essential technology to support both instruction and administrative needs.
- Identify areas where improvements can be

made. Strengths:

The first strength that can be clearly identified at Linn-Benton Community College is that information Services enjoys a high level of **executive support**. This support takes shape in several ways but the three most vital are:

1. Information Services is given a role in the assessment, planning and decision making levels of the college. Technology concerns are freely discussed, and expert opinions, both inside and outside the institution, are sought out and thoughtfully considered.
2. The college has made sacrifices to provide sufficient funding to high priority technology projects, realizing that these investments in information services initiatives may take time to bring the expected dividends.
3. Positions have been retained and even added to the department in a time when the need for every additional staff person must be clearly justified and demonstrated.

This quantifiable support from the institution has led to a high morale among the technology support staff as they perceive that their contribution to the mission of the college is recognized. This in turn fuels motivation to be more aspirational.

Secondly, the skills and dedication of the **Information Services staff** is a tremendous strength, and the foundation to all successful achievements. As mentioned above, a third of the IS staff have been at LBCC for more than 15 years. They are well acquainted with their colleagues at the school and familiar with the missions and goals of the college. The third of the staff who have been hired in the last two years bring new skills and experience that is relevant and needed to keep forward momentum on projects. This is a good mixture of staff, however it brings some challenges that will be discussed below.

A final strength to mention is the quality, both in reliability and security, of the **network infrastructure** and the protective measures in place. Repeated network scans and a penetration test by an off-campus firm indicates no serious vulnerabilities and very little danger of external

intrusion through the hardened network borders. Updates, current virus definitions, and security patches are quickly propagated through the network and on user's individual systems.

Weaknesses:

While lauding the Information Services staff is somewhat satisfying, it must be noted that the makeup and tenure of the current staff also pose some substantial weaknesses that need to be addressed.

1. The **tenure** of a large percentage (1/3) of the IS staff means that a large number are eligible for and can be expected to retire and leave the workforce in relatively short order, vacating some long held positions and taking a great deal of vocational expertise, as well as institutional knowledge, with them. This kind of unplanned disruption could be a detriment. Being aware of this possibility, the department has been stressing the need for formal and informal ways of documenting and sharing information and processes.
2. As mentioned above the IS department does not reflect the **diversity** by gender or race that should be seen in this community. As the current staff suffers attrition, replacements need to be recruited from a more widely diverse pool of applicants and considered with a diversity rubric before they are hire in order to meet the campus equity goal.
3. The makeup of the current IS staff is noticeably skewed toward **desktop support** for instructional labs and, staff and faculty personal computers, while having a lighter emphasis on networking, development and web skills. The anticipated retirement of the more mature employees will allow for a gradual realignment of the expertise represented in the department. Technologies like virtual desktops (VDI) and endpoint management will allow us to spend less staff time maintaining individual computers. Middleware integration, network security and web development will be the knowledge more in demand.
4. There are some **support expertise gaps** in the current technology support staff mix that can be justified as critical to the college goals. These three types of specialists that have been identified are:
 - a. *Instructional technologist* – with dual backgrounds in technology and pedagogy, support could be provided to faculty to integrate technology in their classes in innovative and engaging ways, using technology to address flipped classrooms, gamification, and mobile technology in education.
 - b. *Disability and accessibility compliance expert* – again to provide faculty support in designing course instruction and material to serve an under-represented population of students. In line with the college equity goal, technology has limited use in overcoming many racial or socio-economic disadvantages, but it can make

a great impact on improving the services and opportunities afforded to less-abled or otherwise impaired students.

- c. *Information and cyber security specialist* – As the technology landscape evolves and broadens, the need to protect the privacy, integrity, and security of data is something that requires unique knowledge and experience to provide. The current threatening nature of information security is discussed below, and a specialist in that area can help guide the college.

While enthusiastic about the current funding for Technology initiatives, there are some traditional budgeting practices that have created identifiable weaknesses.

1. **Chargebacks** for security and operationally needed software, hardware, and support is inefficient and creates additional work. Proper budgeting would eliminate the additional processing and cost would remain constant.
2. Departmental purchases of **software** makes management of licensing contracts difficult and loses potential economies of scale savings. A centralized IT budget for software purchases is being established. That budget needs to be evaluated and increased annually as software licenses trend upwards at five to seven percent a year.
3. Funds for **equipment replacement** were cut for several years and now the number of outdated machines has reached a volume that precludes an easy catch up schedule (both because of cost and workload), as described above. The current pattern of equipment replacements is unsustainable. The IS support staff have prolong the usable life of the majority of campus equipment by upgrading memory and installing solid state drives (SSD) for the majority of desktop inventory. They have also developed an upgrade policy (*Appendix K: Information Technology Update Plan*) designed to help manage the evaluation and replacement of deployed computers. The virtual desktop (VDI) project could eventually save money by extending the life of equipment beyond its current usefulness, but the near term will require careful management and additional funds to stabilize the replacement cycle.
4. **Special purpose fees**, such as technology or distance learning fees are a model that needs to be re-evaluated. The advisability of funding ubiquitous infrastructure (such as wireless access point), support staff salaries, and software licenses which are used by all students, from a special purpose fee is not clear. While at one time technology fees were common components of a higher education price tag, the ubiquitous nature of many technology services make them more utilitarian than competitive.

The tendency to use **customized/exception** based business processes is an evident weakness at LBCC and has led to a highly modified enterprise record system (Banner) which can more properly be referred to as “Frankenbanner.” The enterprise support teams efforts to decommission modifications and take the system back to a baseline state is necessary, but will be

difficult. Any modifications retained need to be carefully evaluated for their ability to positively impact one of our three strategic goals. If they do not improve productivity, equity, or quality then we should avoid the modification and the exception.

The practice of altering the college's central record system has also lead to the practice of implementing **alternative or shadow systems** that compete with and often contain vital records outside of the authorized systems. With faculty keeping grades in spreadsheets, and administrative assistants keeping lists in access data files, the college maintains multiple learning management systems (LMS) on campus, Moodlerooms and Canvas. The practice can be curtailed on a campus-wide basis through additional training of staff and faculty and greater engagement by IS.

Opportunities:

With the new bond construction projects LBCC has a unique opportunity to revisit or current **wide-area bandwidth** providers and capabilities and investigate the following opportunities:

- consolidate bandwidth providers or engage secondary service providers for greater redundancy
- increase bandwidth to remote campus centers
- pilot the use of microwave connection in limited range urban areas
- potentially decrease costs

We currently have sufficient bandwidth between most locations, but the current expansion plans will place greater number of students, and a greater demand, on our network. Examples are the additional digital streaming that is being planned for the new Health Care Occupation Center, and the use of new digital instructional technology at the ATTC in Lebanon.

Because the need for bandwidth, more capacity and speed, in every segment of the campus network, there is also an opportunity to plan for increased capacity on the **inter-building fiber** at the Albany campus. If planned and budgeted, the current 1Gbps (Gigabit per second) fiber could be increased to 10Gbps. The current network functions admirably in the current configuration, but as additional security video cameras are added to campus, centrally-managed access control for entrances is implemented, and more network traffic is generated using virtual desktops, then it is probable that our current network capacity will not be sufficient.

The **cloud** presents a great opportunity to remove resources from campus owned and on premise hardware and storage. As equipment becomes more commoditized, faster, and interchangeable, the institution's need to maintain costly and relatively labor intensive architecture in the data center diminishes. Ellucian predicts that the majority of their customer base will be hosting their ERP systems in the cloud by 2020. Many of our services (such as Gmail, Google for Education, Office 365) are already in the cloud. There is every indication that the benefits of reliability,

security and economics will cause this trend to continue. LBCC has an opportunity to start piloting and finding how cloud services can be used by us to benefit our student population.

Often when we discuss opportunities, it is difficult to see how the initiatives, such as increased bandwidth, will impact the college's goals for productivity, equity, and quality for our students. Yet, the work of academic programs that bring higher completion rates, broader community representation, and lead to better job placement following college is only possible if we have a solid foundation to build on. Information Services is a primary piece of that foundation. The technology, network, and tools we provide make innovation possible, and, more importantly, sustainable.

One great opportunity that builds sustainability is **training** of staff, faculty, and students. A more deliberate approach to developing the needed skills and attitudes toward technological concepts will have to be taken on campus for any of our initiatives to be successful over the long term.

As we have discussed the need to fill expertise gaps with an *Instructional technologist*, a *Disability and accessibility compliance expert* and an *Information and cyber security specialist*, it should also be noted that a large part of the need is to disseminate their particular knowledge to the wider college community. Information Services promotes opportunities for training and skill building; however, LBCC staff often feel too busy or shorthanded to invest the needed time to acquire skills that might reduce labor over time.

Threats:

A recent Educause survey indicated the **Information Security** is the number one threat identified by most institutions of higher education CIO's. This is because of the risk associated with transacting, managing, and storing large amounts of personal and sensitive data on campus networks. Colleges and universities are becoming more attractive targets to bad actors in the cyber world as governments and businesses increase their security posture.

LBCC has not been keeping up. We have a college security plan (see *Appendix L: College Security Plan*) that was formalized several years ago, but it needs to be revisited and revised more frequently. Policies and procedures need to be kept current. This has become a priority and IS has formed an IT Security group which is a collection of networking technology, desktop support, enterprise technology, and media support staff that evaluate IT security risks and develop infrastructure and policy remedies.

Penetration test and scans reveal that our network perimeter is secure and we have a tough outer skin, but the IT security group is worried about internal security. A recent industry survey indicated that 95 percent of people share up to six passwords with other people, and 22 percent of respondents said they share the passwords with co-workers. In fact, 61 percent report that they are more likely to share a work password than a personal password, and 73 percent will not reset that password after having shared it. (*Lastpass customer survey, May 2016*) These kind of

statistics, and the common attitudes behind them, indicate that LBCC data may be secure from external access, but once an agent is inside our network we have some significant risks.

Disaster recovery is the last threat that is identified in this report. Disaster recovery policies and processes are in place, yet we do not have a scheduled testing of recovery processes or regulated checks of backed-up and archived data. Once those are scheduled and undertaken on a regular basis, we will be able to test unplanned “chaos monkey” type scenarios to further refine our plans and disaster readiness.

Conclusion

LBCC has made significant technology investments in the recent past which have greatly improved student access to technology, increased support staff in IS, and upgraded the college's data communications infrastructure to improve reliability of mission-critical systems.

Investments have also been made in additional software solutions and professional services to provide for better availability and usefulness of Banner data and functionality.

IS projects are underway or being planned that require substantial IS resources, and special focus is being placed on project planning methodology and management. Looking to the future, topics of importance for the college include desktop virtualization, identity management, and cloud technologies. In preparation for these future strategic projects, the college anticipates expanded virtualization, data storage and network infrastructure, as well as increased access to wireless and updating wired connections college-wide.

Our review of the college IT environment, including staffing and funding, indicates that there are some opportunities for re-organization of staff, and realignment of skills with anticipated shifts in technology. Some adjustment to our funding models are recommended to make software purchase more efficient and provide for equipment upgrades in a more transparent and sustainable method.

The major projects of Banner baseline, DegreeWorks, distance learning completion, and identity management will help stabilize the technology foundation that we need for future projects, while we focus on shoring up our IT security and disaster recovery plans. The role of the college administration in providing governance and oversight to IS projects and priorities is clearly defined and structured to provide a close tie between technology initiatives and the mission and strategic objectives of the institution.

Appendices A through M

Appendix A: College and President's Strategic Objectives 2015 – 2016

- 1) Instill college-wide ownership and responsibility for LBCC Goals attainment.
 - a. Employ MERIT Mission Themes and Objectives to “flesh out” Mission and Goals and to help faculty and staff see their particular roles in their attainment.
 - b. Revise and improve both program review and institutional metrics to document and track attainment of institutional and strategic goals.
 - c. Develop and implement Human Resources practices that address Mission and Goals with applicants and orient new employees to our strategies for their attainment.
- 2) Develop and/or modify existing policies and practices so that they represent intentional actions to build a culture that exhibits our Goals and Values.
 - a. Develop and implement faculty and staff recruiting and hiring practices that intentionally advance our Goals and Values.
 - b. Provide more resources for faculty and staff, including Professional Development training to do cultural training.
 - c. Develop polices and resources for preventing and resolving workplace conflicts.
 - d. Develop polices and resources for employees to improve their ability to interact with others whose values, opinions, and/or beliefs differ from their own.
 - e. Continue assessment with a focus on Cultural Literacy.
 - f. Combine the DCE and Values Committees into a single Council with a clearer and more formalized “charge,” focusing on LBCC Core Values and an increased appreciation of and capacity for Civil Engagement with one another.
- 3) Make the “Student Success Pathway” work for our students (Progression and Bruce)
 - a. Engage in AACC “Next Big Thing” Initiative – creating guided pathways for student progression.
 - b. Improve Fall to Fall retention of students.
 - c. Work with K-12 Partnerships so that all “traditional” incoming students already have identified academic goals, a detailed 2-3 year academic plan for achieving them, and are academically prepared to pursue them.
 - d. Make certain that our Course Schedules accommodate the academic plans of our students.
- 4) Make significant progress on the design and/or construction on all four capital projects to be funded by the November Bond Ballot Measure, and complete an associated Facilities Master Plan.
 - a. Complete Facilities Master Plan.
 - b. Manage Cap Con Projects (on time and in budget).
- 5) More fully implement and make more effective and efficient use of the technology we currently own.
 - a. Implement and utilize Banner modules that can help make college operations more efficient.
 - b. Eliminate unnecessary customization of Banner modules, reducing the staff time and reliance on obsolete technology necessary to maintain them.

- c. Begin project planning, faculty consultation and resource gathering for a web based student planning and advising tool. (DegreeWorks)
- d. Implement web-based student support services and resources.
- e. Implement an identity management system as the core of the individualized, single point of entry pathways (portals).
- 6) Develop and implement a Coherent Financial Resource Strategy.
 - a. Intentional Tuition Policy (revisit indexing policy with Board)
 - b. Address/Develop Strategy for adapting “Free Tuition” Initiatives
 - c. Expanded Foundation function in providing operational support for LBCC
 - d. Coherent and transparent budget models for programs and activities (or their component parts) that generate financial resources (Auxiliary, Enterprise, Cost - Recovery)
 - e. Coherent and comprehensive policies and practices for Grant applications and administration
- 7) Work collaboratively with Faculty and Classified Associations to negotiate and act collaboratively in accordance with Association Contracts that define our relationships and clarify our roles in a manner that helps us serve our Mission and achieve our Goals.
 - a. Negotiate PT Faculty Contract
 - b. Current Faculty Contract; Appendix J – Convene a taskforce made up of faculty and managers to revise the Department Chair Points sheet.
- 8) Expand and Update our Career-Technical programs in response to (and anticipation of) local industry needs and a State focus on the "Middle 40" of 40-40-20.
 - a. Develop and Implement comprehensive plan of CTE program development and continuous improvement (including HS partnerships, Contract Training, SBDC and SBM, CTE, new programs, and business partnerships.)
 - b. Complete ATTC and fully implement associated transportation and energy programs.
 - c. Initiate capacity and curricular expansion of Mechatronics, Welding, and Machine Tool programs.
 - d. Expand Health Occupations programs in response to changing health care delivery systems.
 - e. Respond to the changing needs of industry and community employers.
- 9) Complete an Information Technology strategic plan incorporating input from a broad range of campus stakeholders and meeting the need for accreditation requirements as well as tying information services future initiatives and projects with the college’s goals and objectives.
- 10) Complete Accreditation Self Study.

Appendix B: Information Technology Governance Committee (ITGC) Charter

Introduction:

The ITGC is chartered to provide oversight and guidance to the college's information technology through collaborative efforts. The intent of the ITGC is to provide guidance to the sub-committees (Administrative Systems Steering Committee, Web Strategies Committee, IT Security Group, Infrastructure Planning Group, and Technology Fee Faculty Committee).

Purpose:

The ITGC will provide the strategic vision, direction, and priority, of projects involving information technology across Linn-Benton Community College (LBCC). The ITGC will take into consideration the colleges strategic priorities, policy development, and opportunities for efficiencies in information technology for the college.

The ITGC is the forum for the ITGC sub-committees to bring documented projects, ideas, and suggestions. The ITGC will examine and question ideas and suggestions, approve/disapprove projects, and assign college priority for approved projects. Projects may, or may not be assigned additional resources such as budget by the ITGC.

ITGC is charged with maintaining a broad awareness of the IT environment internally and externally, in order to reducing duplication of effort, consolidating resources, fostering innovation, and scaling up solutions that have broad appeal or usefulness.

The ITGC acts as the primary sponsor to present recommendations regarding IT infrastructure, systems, and policy, to the campus and Board members.

Scope:

The ITGC is tasked with the following duties and responsibilities. This list is not intended to be an all-inclusive list, but rather an example of the roles of the ITGC in support of information technology at Linn-Benton Community College, as sub-committees submit their projects, ideas, and suggestions

Examine projects to insure alignment with LBCC strategic priorities;

Ask questions, and provide input to assist the establishment of best business practices regarding campus technology for LBCC;

Report out at college council to inform others about information technology projects;

Provide a venue for adoption of non-strategic technology projects which are outcome based for LBCC in order to help the college meet its goals, and more effectively utilize personnel and money resources;

Maintain and prioritize the campus technology list;

Identify, develop and support ongoing education and training opportunities member and guest participation, presentations, and information sharing;

Assist classified staff, faculty, and students in creating effective and efficient educational information technology programs.

The ITGC will meet once per term, but may meet more if required, or desired by the sub-committees.

Appendix C: Web Strategy Committee Charter

Given the strategic importance of the web as a communications and marketing tool to current and prospective students, as well as the college community at large, we have a working group to recommend and implement web strategies. The working group has a broad membership to ensure the needs and perspectives of different departments are considered.

The Web Strategy Committee is a consensus-based committee, accountable to the ITGC, co-led by the Web Architect and CIO. The Web Strategy Committee is responsible for:

- Analyzing current web strategies and identifying opportunities for improvement.
- Setting web operational standards and guidelines.
- Planning and coordinating ongoing web projects including the creation of project teams and work groups.
- Promoting “best-practices” to department content creators.
- Reviewing future directions and present recommendations to campus leadership.
- Cross-campus input and representation related to the web.
- Communication to and from campus stakeholders.
- Approval of web policies and guidelines related to the web to ensure that pages:
 - Are consistent in appearance and clearly branded as LBCC web pages.
 - Are in compliance with all necessary laws and state policies (such as ADA.)
 - Contain only content that is appropriate to those web

pages. In fulfilling these responsibilities, the committee strives to:

- Provide recommendations on the use, operations, and policies associated with navigation, design standards, and web style guide. Including adjusting the web standards for mobile device layouts.
- Coordinate web technologies to ensure they interoperate as a coherent whole.
- Convey one LBCC brand with a consistent design and navigation scheme.
- Support departments in the efficient fulfillment of their objectives;
 - Provide clear path to departments on how to leverage central web resources to market their services.
 - Offers educational workshops to share best practices and assist the campus community.
- Addressing any issues with regard to the format, function, and accuracy of the College website that may arise.
- Include the perspective of stakeholder groups including Faculty and Students.
- Raise institutional awareness about multiple system logins and accessibility issues.
- Get a long term web strategy and build specific (measurable) goals.

Our goals for the website:

- Give prospective students good reason to apply, then allow them to do so easily.
- Engage our current students and guide them to needed information that leads them to persist and transition to work or university.
- Serve informational needs for community, staff, and management.

App endix D: Information Services Server Inventory



Information Services Strategic Plan
2016

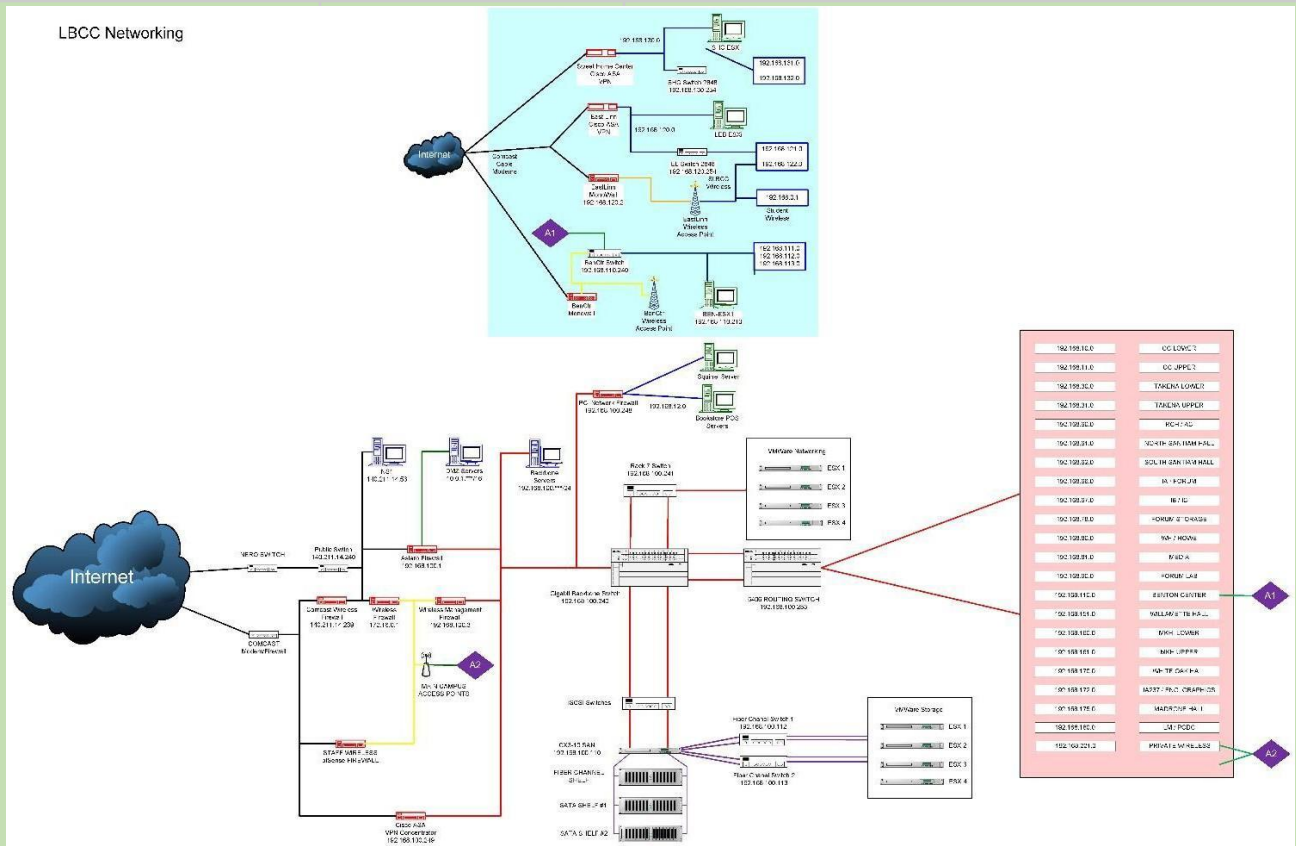


Information Services Strategic Plan
2016



Information Services Strategic Plan
2016

Appendix E: Information Services Network Diagrams



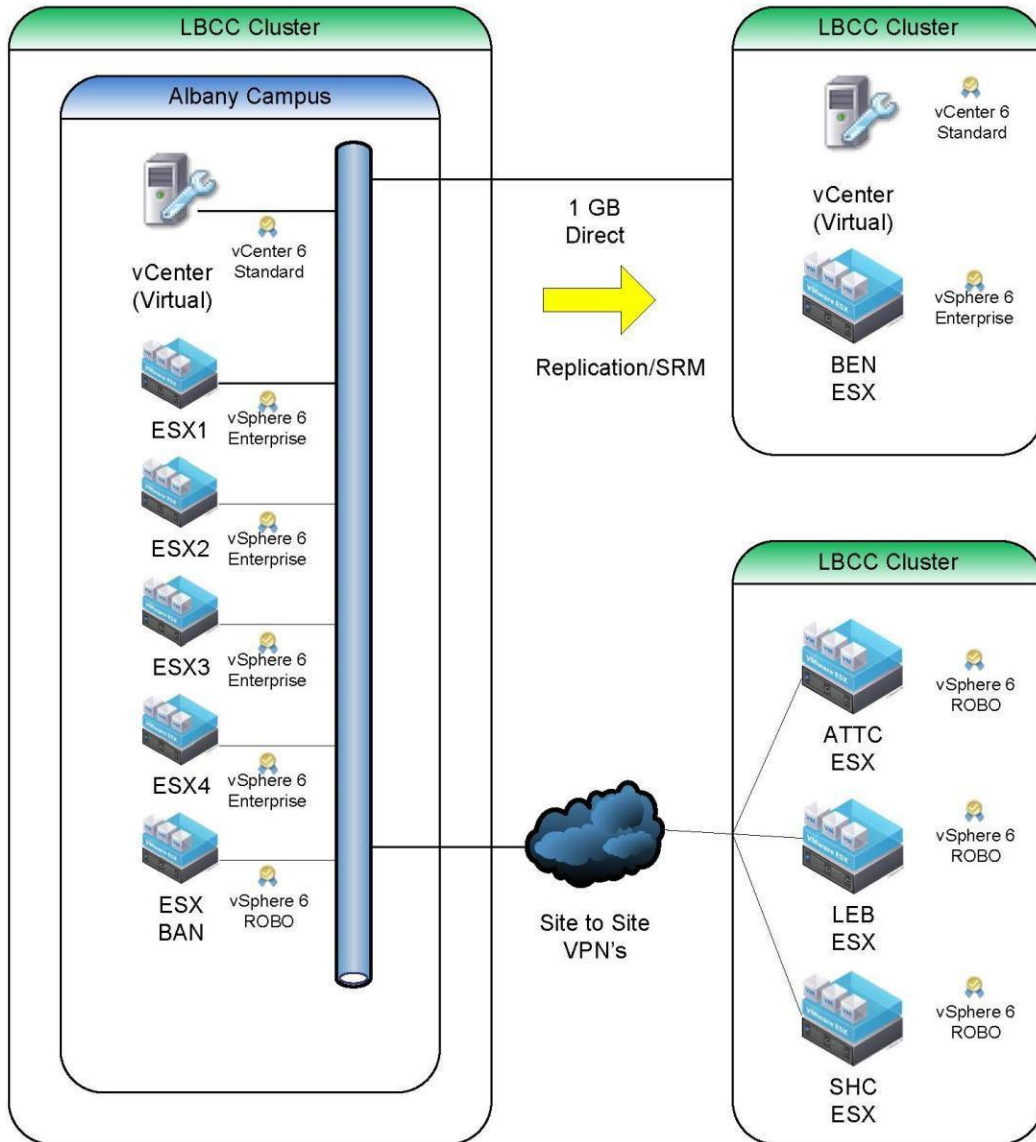
| Name | Location | Notes |
|-------------------------|------------------------|---|
| PHYSICAL SERVERS | | |
| ALB-Archive | Albany | Backup Server connected to old Tape Library |
| ALB-Imaging | Albany | Imaging storage server |
| ALB-SQLSRV-01 | Albany | SQL Server used by various instructional and administrative systems |
| ALB-Tape | Albany | Tape Server connected to our new Tape Library |
| ALBDC1 | Albany | AD Domain controller |
| ESX-ATTC | ATTC – Lebanon | VMWare Server - Hosts virtual servers at ATTC |
| ESX-BEN | Benton Ctr - Corvallis | VMWare Server - Hosts virtual servers |
| ESX-LEB | Lebanon Ctr - Lebanon | VMWare Server - Hosts virtual servers at Lebanon Cent |
| ESX-SHC | SH Ctr - Sweet Home | VMWare Server - Hosts virtual servers at Sweet Home |

| | | |
|-------------------------|--------------------|--|
| ESX1-Albany Cluster | Albany | VMWare Server - Hosts virtual servers |
| ESX2-Albany Cluster | Albany | VMWare Server - Hosts virtual servers |
| ESX3-Albany Cluster | Albany | VMWare Server - Hosts virtual servers |
| ESX4-Albany Cluster | Albany | VMWare Server - Hosts virtual servers |
| ESX5-Banner | Albany | VMWare Server - Dedicated to Banner VM's |
| VIRTUAL SERVERS | | |
| ALB-Aeonix | Albany ESX Cluster | Aeonix server is the PBX and Voice Mail. |
| ALB-APPSERV-01 | Albany ESX Cluster | General App Server |
| ALB-AWS | Albany ESX Cluster | Academic Web Server for Student use in classes |
| ALB-BannerFTP | Albany ESX Cluster | FTP Server |
| ALB-CADDLS | Albany ESX Cluster | CAD License Server |
| ALB-CClimate | Albany ESX Cluster | Scantron Class Climate - for instructor evaluations |
| ALB-DFCORE | Albany ESX Cluster | Deepfreeze Core server |
| ALB-DHCP-01 | Albany ESX Cluster | Backbone DHCP server for LBCC Albany campus. |
| ALB-DMZ-DC1 | Albany ESX Cluster | DMZ Domain Controller |
| ALB-DMZ-DC2 | Albany ESX Cluster | DMZ Domain Controller |
| ALB-DMZDNS | Albany ESX Cluster | DMZ 2nd DNS server |
| ALB-DSS | Albany ESX Cluster | Digital Streaming Serve. |
| ALB-EDI | Albany ESX Cluster | Transcript Transfer Host |
| ALB-EIOBoard | Albany ESX Cluster | EIO Board server. NTP server. |
| ALB-EITLS | Albany ESX Cluster | Licensing server for CADD (Drafting & Eng) program. |
| ALB-EMS | Albany ESX Cluster | Event Management System/Paperless Office website. |
| ALB-Extron | Albany ESX Cluster | Used for Media switching devices in classrooms |
| ALB-Farcry | Albany ESX Cluster | Webserver for Main website and CMS |
| ALB-FCDEV | Albany ESX Cluster | Farcry Test Server (older version) |
| ALB-FCDEV62 | Albany ESX Cluster | Farcry Development Server |
| ALB-FS01 | Albany ESX Cluster | G: and I: Drive File Server |
| ALB-FW-Comcast-pfSense | Albany ESX Cluster | Comcast Firewall Site to Site VPN line |
| ALB-FW-PCI-Astaro | Albany ESX Cluster | PCI Firewall |
| ALB-FW-Wrls-Mgmt-Astaro | Albany ESX Cluster | Astaro Firewall for Wireless segment |
| ALB-Google-API | Albany ESX Cluster | Workstation used for nightly processing of Google Acco |
| ALB-GoPrint | Albany ESX Cluster | GoPrint Server - Pay for Print system |
| ALB-KhamuHost | Albany ESX Cluster | Food Services POS system |
| ALB-LF | Albany ESX Cluster | Laserfich Server |

| | | |
|-------------------|--------------------|---|
| ALB-LF-Forms | Albany ESX Cluster | Laserfich Forms Server in DMZ |
| ALB-LFAdmin | Albany ESX Cluster | Workstation with the Laserfich Admin client installed. |
| ALB-Libweb | Albany ESX Cluster | Library Web Server |
| ALB-MINMENU | Albany ESX Cluster | Minute Menu |
| ALB-MRTG - XPPro | Albany ESX Cluster | MRTG Server (upgrading soon) |
| ALB-MSDS | Albany ESX Cluster | MSDS Server used by Safety |
| ALB-Navori | Albany ESX Cluster | Digital Signage for Media, Contact Whit Hamilton |
| ALB-Netwatch | Albany ESX Cluster | Netwatch network device monitoring software |
| ALB-NS1 | Albany ESX Cluster | Outside DNS Server |
| ALB-Partest | Albany ESX Cluster | Partest Server for Nursing program |
| ALB-PMR | Albany ESX Cluster | Patient Management Records. |
| ALB-PWM | Albany ESX Cluster | Password Portal Manager backend server (Netwrix) |
| ALB-PWMWeb | Albany ESX Cluster | Password Portal Web Server in DMZ |
| ALB-RE | Albany ESX Cluster | Raisers Edge Server - Fund Raising |
| ALB-SC | Albany ESX Cluster | System Center Configuration Manager. |
| ALB-SC4020-EM | Albany ESX Cluster | Dell Storage Center Server for access to Dell Compellen |
| ALB-SEP2 | Albany ESX Cluster | Symantec Endpoint Protection |
| ALB-SMTP1 | Albany ESX Cluster | A replacement server for the current ALB-DHCP01 |
| ALB-Solarwinds | Albany ESX Cluster | Solarwinds Network Monitoring Server |
| ALB-SPICEBB | Albany ESX Cluster | Spiceworks Backbone Server |
| ALB-Spiceworks | Albany ESX Cluster | Spiceworks Segments Server |
| ALB-SWSVCS | Albany ESX Cluster | DHCP services for the Student Wireless segment. |
| ALB-VCVA1 | Albany ESX Cluster | VMware vCenter Server Appliance |
| ALB-Veeam1-New | Albany ESX Cluster | Veeam Backup/Replication Server |
| ALB-VProxy1 | Albany ESX Cluster | Veeam Albany Proxy Server |
| ALB-Webwork | Albany ESX Cluster | Used by the Math program |
| ALB-Webwork2 | Albany ESX Cluster | New Webwork server for the Math program |
| ALB-WS-Banner1 | Albany ESX Cluster | Used by High School Counselors |
| ALB-WS-CLEP-Admin | Albany ESX Cluster | CLEP Admin workstation used by Testing |
| ALB-WS-ISVideo | Albany ESX Cluster | Video Capture Server |
| ALB-WS-PtrScan | Albany ESX Cluster | CTX Printer Scanning PC for maintenance reports |
| ALB-WSUS | Albany ESX Cluster | Windows Services Update Server |
| ALBDC2 | Albany ESX Cluster | Domain Controller 2 |
| ALBDC3 | Albany ESX Cluster | Domain Controller 3 |
| NB-ALB-ICS | Albany ESX Cluster | Bookstore ICS Server |

| | | |
|-------------------------|--------------------|-------------------------------------|
| NB-ALB-POS | Albany ESX Cluster | Bookstore Albany POS Server |
| NS1 | Albany ESX Cluster | Outside DNS server |
| BAN-nGrid | Albany ESX Banner | Banner nGrid DEVL server |
| BAN-nNaboo | Albany ESX Banner | Banner nNabbo DEVL server |
| BAN-nVenus | Albany ESX Banner | Banner nVenus DEVL server |
| ATTC-FILE1 | ATTC ESX Server | ATTC File Server |
| ATTC-FW-Monowall2 | ATTC ESX Server | Wireless Firewall |
| ATTC-ShopKey | ATTC ESX Server | ShopKey Server |
| ATTC-VProxy1 | ATTC ESX Server | ATTC Veeam Proxy |
| ATTCDC1 | ATTC ESX Server | ATTC Domain Controller |
| BEN-FW-Comcast-m0n0wall | BEN ESX Server | Wireless Firewall |
| BEN-VProxy1 | BEN ESX Server | Benton Center Veeam Proxy |
| BENDC | BEN ESX Server | Benton Center Domain Controller |
| NB-BEN-POS | BEN ESX Server | Bookstore Benton Center POS |
| LEB-FS1 | LEB ESX Server | Lebanon Center File Server |
| LEB-FW-Monowall | LEB ESX Server | Wireless Firewall |
| LEB-VProxy1 | LEB ESX Server | Lebanon Center Veeam Proxy |
| LEB-WSUS | LEB ESX Server | Lebanon Center WSUS Server |
| LEBDC2 | LEB ESX Server | Lebanon Center Domain Controller |
| NB-LEB-POS | LEB ESX Server | Bookstore Lebanon Center POS |
| SHC-FS1 | SHC ESX Server | Sweet Home Center File Server |
| SHC-FW-Monowall | SHC ESX Server | Wireless Firewall |
| SHC-VProxy1 | SHC ESX Server | Sweet Home Center Veeam Proxy |
| SHCDC2 | SHC ESX Server | Sweet Home Center Domain Controller |

LBCC VSPHERE CONFIGURATION



All ESX Hosts are vSphere 6.0x

Appendix F: Computers in Instructional Spaces & Labs

| Location | Division or Dept | Count |
|----------|---------------------|-------|
| ATTC | ATTC | 41 |
| BC206 | Community Ed | 21 |
| BC207 | Science | 7 |
| BC209 | Science | 5 |
| BC222 | LCC | 18 |
| BC225 | Bus Tech | 24 |
| BC232 | LCC Annex | 4 |
| BC236 | ABE/GED | 1 |
| BC237 | | 1 |
| BC238 | | 10 |
| BC239 | | 10 |
| Corv HS | Corv HS | 3 |
| CC212 | Contracted Training | 11 |
| F202 | CS Computer Lab | 51 |
| IA101 | Welding | 5 |
| IA213 | Environ Tech | 13 |
| IA215 | Electronics | 24 |
| IA232 | Writing | 25 |
| IA237 | Engr Graphics | 28 |
| IB110 | Machine Tool | 26 |
| IB120 | Mechatronics | 17 |
| IC102 | Heavy Equip | 12 |
| IC105 | Heavy Equip | 3 |
| IA | | 19 |
| LC116 | OR Employm Dept | 6 |
| LC153 | Nursing | 4 |
| LC202 | LCC | 7 |
| LC204 | ABE/GED | 6 |
| LC205 | Art/Sci | 7 |
| LC219 | Bus Tech | 34 |
| LC220B | Computer Classrm | 16 |
| SHC102 | GED/Math | 5 |



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| | | |
|---------|--------------------|----|
| SHC103 | Testing | 1 |
| SHC104 | Computer Classrm | 23 |
| LM115 | | 16 |
| LM116 | ABE/GED | 27 |
| LM130 | ESOL/JOBS? | 7 |
| MH106 | Science | 3 |
| MH107 | Science | 73 |
| MH114 | Science | 7 |
| MKH103 | | 20 |
| MKH105 | | 49 |
| MKH201 | Bus Sys | 26 |
| MKH207 | Bus Sys | 26 |
| MKH209 | Bus Sys | 26 |
| MKH211 | Bus Sys | 26 |
| NSH108 | Writing Lab | 25 |
| SSH116D | Digit Img | 21 |
| SSH120 | Graph Desgn | 44 |
| RCH109 | Testing | 18 |
| RCH211 | Dental | 6 |
| RCH213 | Dental | 5 |
| RCH114 | ODS | 12 |
| RCH118 | ODS | 1 |
| T115 | Admiss | 19 |
| T216 | Nursing | 11 |
| WH137 | Library | 35 |
| WH139 | Library Lab | 31 |
| WH222 | LCC Comp Classrm | 25 |
| WH224 | LCC Comp Classrm | 31 |
| WH225 | LCC Skills Zone | 7 |
| WH226 | LCC Writing Center | 8 |
| WH227 | Math | 5 |
| WH230 | LCC Tutoring | 1 |
| WOH120 | | 1 |
| WOH121 | | 4 |

| | | |
|--------|--|----|
| WOH122 | | 25 |
|--------|--|----|

| | | |
|-------------|-----------|-------------|
| WOH1xx Math | | 45 |
| WOH205 | | 8 |
| WOH214 | | 10 |
| WOH216 | | 9 |
| WOH218 | | 2 |
| WOH218 | | 8 |
| AC | | 2 |
| ATTC | | 6 |
| BC | | 4 |
| BC | | 6 |
| CC | | 7 |
| F | | 5 |
| IA | Welding | 2 |
| IA | | 14 |
| IB | | 3 |
| IC | | 4 |
| LC | | 9 |
| MH | | 7 |
| MKH | | 3 |
| NSH | | 9 |
| RCH | Dental | 5 |
| SC | | 1 |
| SSH | | 4 |
| T | | 6 |
| WH | | 5 |
| WH | Media Lab | 4 |
| WOH1 | | 1 |
| WOH2 | | 7 |
| | | 1325 |

Appendix G: Banner Change Request (CSR) Log

| Add Date | CSR | Priority | Division | Title |
|-----------|------|----------|----------|---|
| 11-Dec-14 | 3428 | MEDIUM | HR | Fix data in FTVORGN |
| 28-May-15 | 3447 | HIGH | REG | SWRADFO Update |
| 9-Jun-15 | 3465 | MEDIUM | STU | Enrollment Fix |
| 30-Oct-15 | 3514 | MEDIUM | FND | Raiser's Edge Export |
| 13-Jan-16 | 3530 | MEDIUM | HR | Add PT sick lv codes to PERS file |
| 13-May-16 | 3560 | HIGH | HR | Quarterly Taxes Form 132 Reporting |
| 8-Feb-16 | 3537 | MEDIUM | CCS | County Code Cleanup |
| 16-Jun-15 | 3466 | MEDIUM | REG | Academic Standing and S1 Students |
| 22-Jun-15 | 3474 | LOW | STU | Smarter Balance ID and score integration |
| 1-Sep-15 | 3494 | MEDIUM | HR | Deactivate the "Activate Step Level" Button during August |
| 11-Jul-16 | 3564 | MEDIUM | CCS | BWPREDIR |
| 12-Jul-16 | 3567 | LOW | BUS | TWPWVRE Exemption Over Exceptions |
| 12-Jul-16 | 3568 | MEDIUM | STU | SWPAPIN Nightly |
| 2-May-11 | 3256 | HIGH | BUS | Show balance due on NetPay |
| 27-Sep-11 | 3275 | MEDIUM | HR | Earn code report |
| 17-Oct-11 | 3276 | MEDIUM | HR | Direct deposit for employee |
| 30-Mar-12 | 3293 | LOW | BUS | Online Payment Plan |
| 28-Jun-12 | 3304 | LOW | HR | Update Mass termination to include error report |
| 4-Oct-12 | 3317 | HIGH | HR | Time Entry portion of Employee Self Service |
| 10-Oct-12 | 3321 | MEDIUM | AA | Time Conflict Checking Project |
| 10-Oct-12 | 3322 | MEDIUM | AA | Time Conflict Checking-Change FTE calculations for LAB/TBA |
| 8-Nov-12 | 3330 | MEDIUM | STU | Possibly replacing SGAADVVR with LB Specific Form |
| 8-Feb-13 | 3348 | MEDIUM | HR | Reset IPEDS indicator |
| 17-Jul-13 | 3380 | MEDIUM | HR | Taxable income |
| 25-Mar-14 | 3408 | MEDIUM | STU | SSN Disclosure Cleanup |
| 11-Apr-14 | 3411 | MEDIUM | HR | Part time faculty roll |
| 11-Apr-14 | 3412 | MEDIUM | HR | Part time faculty pay rate |
| 9-May-14 | 3417 | MEDIUM | HR | Part time faculty automated system |
| 23-Jul-14 | 3422 | MEDIUM | FA | Modification to the RYASAPR Process (Add another attribute) |
| 2-Oct-14 | 3424 | MEDIUM | ME | Moodle Conduit Cron Data Verification |
| 22-Oct-14 | 3425 | HIGH | HR | Part time faculty automated system |
| 7-Jan-15 | 3434 | HIGH | HR | Part time faculty authorizations |
| 12-Jan-15 | 3436 | MEDIUM | HR | Part time Faculty automated system |
| 21-Apr-15 | 3441 | HIGH | REG | Add swpcohta.sql to swpcoht swarpts process |
| 24-Apr-15 | 3442 | MEDIUM | HR | PT Faculty audit |
| 28-May-15 | 3446 | MEDIUM | REG | Fix SWPDEEP |
| 29-May-15 | 3449 | HIGH | HR | Salary and benefits for employees |
| 8-Jun-15 | 3452 | LOW | BUS | TWPELPR needs code changes |
| 8-Jun-15 | 3456 | MEDIUM | STU | Correction needed for SWACOH form |
| 8-Jun-15 | 3459 | MEDIUM | STU | SWRBGRD |
| 8-Jun-15 | 3460 | MEDIUM | AA | Data Cleanup - CIPC Codes |



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| | | | | |
|-----------|------|--------|-----|--|
| 8-Jun-15 | 3462 | MEDIUM | CCS | LBCC Job Consistency On SSN Validation |
| 18-Jun-15 | 3471 | MEDIUM | AA | Checkin Cleanup |
| 22-Jun-15 | 3476 | MEDIUM | STU | Duplicate Course checking |
| 22-Jun-15 | 3477 | HIGH | STU | Waitlist to Baseline |
| 22-Jun-15 | 3479 | MEDIUM | AA | Smart catalog/Banner data feed |
| 19-Aug-15 | 3487 | MEDIUM | HR | Deduction register for benefits |
| 26-Aug-15 | 3489 | HIGH | HR | Part-Time Faculty Encumbrances Payroll Feeds to Finance |
| 27-Aug-15 | 3493 | HIGH | REG | Cohort needs to be overhauled and moved to baseline |
| 10-Sep-15 | 3498 | MEDIUM | BUS | Adjust tuition waiver scripts calculation of waiver amt. |
| 21-Sep-15 | 3502 | MEDIUM | REG | Getting GOASEVS set up and ready to use |
| 22-Sep-15 | 3503 | HIGH | HR | ACA hours for employees |
| 26-Oct-15 | 3511 | HIGH | REG | Part-of-Term correction of refund dates |
| 27-Oct-15 | 3513 | HIGH | IL | SWRILRN |
| 3-Nov-15 | 3518 | HIGH | REG | Have cohort populate Reason |
| 9-Nov-15 | 3521 | MEDIUM | IR | OCCURS -> D4A field cleanup |
| 9-Nov-15 | 3523 | MEDIUM | IR | Determine and correct SWRFTR1 discrepancy |
| 24-Nov-15 | 3526 | LOW | STU | Can photos be brought into the banner student records |
| 19-Jan-16 | 3532 | MEDIUM | STU | Online application Phone Number Error |
| 25-Jan-16 | 3534 | LOW | CCS | SWPGEDR program is doubling time when CRN in multiple locs |
| 2-Feb-16 | 3536 | MEDIUM | HR | PT Faculty members |
| 9-Feb-16 | 3538 | HIGH | AA | SWPMEET part of rolling a term |
| 12-Feb-16 | 3541 | HIGH | HR | Remove Benefits and Deductions Functionality |
| 26-Feb-16 | 3542 | MEDIUM | HR | Employee deductions |
| 16-Mar-16 | 3546 | MEDIUM | REG | Add term/crn option to placement test score report SWRPLAC |
| 18-Mar-16 | 3547 | MEDIUM | HR | Terminate employee |
| 28-Mar-16 | 3548 | LOW | CCS | Implement OSU Duplicate Processing Job |
| 14-Apr-16 | 3553 | HIGH | ME | Moodle |
| 25-Apr-16 | 3556 | MEDIUM | ME | SWRMOOD name change update |
| 27-Apr-16 | 3558 | HIGH | IL | Auto Student enrollment into Canvas |
| 3-May-16 | 3559 | MEDIUM | HR | Credit load per faculty |
| 16-Jun-16 | 3562 | HIGH | STU | SWPAPIN for pin removal |
| 29-Jun-16 | 3563 | HIGH | REG | Install ISSM |
| 12-Jul-16 | 3565 | MEDIUM | REG | Baseline Placement Test Scores |
| 12-Jul-16 | 3566 | MEDIUM | REG | Obsolete SWAPTKA |

Appendix H: Information Services Projects

| Information Services Project Portfolio | Projected Start | Completion Target | Status |
|---|----------------------------|------------------------------|---------------|
| Banner Enterprise | | | |
| Banner current on patches | Completed | March 2016 | Completed |
| Clean Address | Completed | May 2016 | Completed |
| New Banner Server | Started | Aug. 2016 | Purchased |
| Banner baseline | Started | July 2017 | Ongoing |
| DegreeWorks | Started | Oct 2018 | Purchased |
| Identity Management/SSO | July 2016 | July 2017 | Funded |
| International Students | July 2016 | Dec. 2016 | Purchased |
| AcademicWorks | Aug. 2016 | Jan. 2017 | Purchased |
| Mobile Applications | Aug. 2016 | Jan. 2017 | Purchased |
| ODS/Cognos | April 2017 | July 2017 | Purchased |
| Banner 9 (XE) | May 2017 | July 2018 | Planning |
| Web | | | |
| Farcry Virtualization | Completed | June 2016 | Completed |
| Zingtree Replacement | Started | Aug. 2016 | Ongoing |
| Master Calendar | Started | Sept. 2016 | Purchased |
| Web Form Consolidation | Started | Jan. 2018 | Ongoing |
| ColdFusion Replacement | Started | Sept. 2017 | Analyzing |
| Faculty web site upgrade | Started | Sept. 2017 | Ongoing |
| Paperless Office Redo | Started | Dec. 2016 | Ongoing |
| Web Directory | Started | Dec. 2016 | Ongoing |
| Search Improvement | Started | June 2017 | Ongoing |
| Guided Pathway sites | Aug. 2016 | Dec. 2016 | Analyzing |
| Identity Management/SSO | July 2016 | July 2017 | Funded |
| Mobile Applications | Aug. 2016 | Jan. 2017 | Purchased |
| Web Site Video | Oct. 2016 | Oct. 2017 | Analyzing |
| Network | | | |
| Backup System | Completed | June 2016 | Completed |
| Farcry Virtualization | Completed | June 2016 | Completed |
| SQL Virtualization | Started | July 2016 | Ongoing |
| Disaster Recovery | Started | July 2017 | Ongoing |
| VDI Pilot | Started | Dec. 2016 | Ongoing |
| Identity Management/SSO | July 2016 | July 2017 | Funded |
| VoIP Conversion | Started | Oct. 2016 | Ongoing |
| SIP Convesion | Oct. 2016 | Oct 2017 | Planning |



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| | | | |
|-------------------------------|------------------|------------|-----------|
| Cloud Web Services | Feb. 2017 | June 2017 | Planning |
| Bond Construction | <i>See Below</i> | | |
| Support | | | |
| SSD Upgrades | Completed | Aug. 2016 | Completed |
| Windows 10 Installation | Started | Sept. 2016 | Ongoing |
| Endpoint Management | Started | Sept. 2016 | Ongoing |
| VDI Pilot | Started | Dec. 2016 | Ongoing |
| Bond Construction | <i>See Below</i> | | |
| Media/eLearning | | | |
| LMS Training | Completed | July 2016 | Completed |
| OER Development | Started | July 2017 | Ongoing |
| iLearn Sustainability | Started | July 2018 | Funded |
| Innovative Classroom | Started | July 2017 | Ongoing |
| Criminal Justice Online | Started | July 2017 | Ongoing |
| Distance Learning | | | |
| Completion | Started | July 2018 | Ongoing |
| Identity Management/SSO | July 2016 | July 2017 | Funded |
| Mobile Applications | Aug. 2016 | Jan. 2017 | Purchased |
| Bond Construction | <i>See Below</i> | | |
| Bond Construction | | | |
| ATTC Innovation Center | Started | Sept. 2016 | Ongoing |
| Heavy Equipment Center | Started | Sept. 2016 | Ongoing |
| Health Care Occupation Center | Started | Feb. 2017 | Ongoing |
| Benton Center Expansion | Sept. 2016 | Sept. 2017 | Planning |
| Albany Campus Redo | Feb. 2017 | Feb. 2018 | Planning |

Appendix I: Banner Baseline Project Charter

| | |
|-------------------------------------|---|
| Purpose and Expected Results | <p>LBCC was one of the first schools in the nation to adopt Banner in the early 1990s. Over the years the system has been highly modified to include functionality that the system did not provide. However, the time and cost to maintain these modifications are not sustainable. In fact, as Banner moves to the next version (XE) all modifications will need to be rebuilt from the ground up.</p> <p>The vision for this project is to identify and remove all LBCC modifications to Banner. This will greatly reduce the maintenance cost for the institution's ERP. Installing and maintaining new software that interfaces with Banner, such as DegreeWorks, will be made more feasible. Staff will become more efficient as they adopt baseline functionality that Banner provides.</p> |
| Project Success Metric | <p>The vision of this project is to get Banner back to a standard baseline version as delivered by Ellucian. Any modifications that are not fully removed during the course of the project will be required to have a plan in place for removal within a year of project close. All changes will be managed to have minimal impact to functionality and student services.</p> |
| Alignment | <p>This project directly ties to LBCC's Strategic Goal of Productivity. One of LBCC's 2015-16 Strategic Objectives is to "More fully implement and make more effective and efficient use of the technology we currently own." This objective specifically states "Eliminate unnecessary customization of Banner modules, reducing the staff time and reliance on obsolete technology necessary to maintain them."</p> |
| Scope | <ul style="list-style-type: none">• Complete an audit of the entire system and identify everything that is not baseline. An inventory of everything found will be generated and maintained.• For every modification, there will be an analysis effort. This analysis will identify data and functionality owners, value and functionality of the modification, and develop a plan for removing the mod.• Removal of modifications. There will be coordination with functional areas to prioritize the removal of modification. Prioritization will include risk, impact, timing, and input from users, as well as planning ahead to remove roadblocks to future projects and enhancements. |



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- Technical and functional users will receive training on baseline functionality in Banner.

**High-Level
Timeline**

The full project from initiation to close is expected to take approximately 16 months.

This timeline is based heavily on experience and assumptions. At the beginning of the project a full audit of the system will need to be made to inventory all modifications. This audit is expected to take at most 2 months. The findings from this audit are an early milestone that will drive the planning and a realistic timeline for the rest of the project.

All modifications will go through an iterative approach to analysis, planning, and removal that will vary depending on size, complexity, and dependencies.

**Assumptions
and Constraints**

- A major constraint for this project is the availability of analysis resources. The functional experts that will be required to analyze Banner functionality are regularly busy with other tasks. This will create a bottleneck that can significantly impact the project.
- It is assumed that Programmers and Analysts will dedicate 50% of their capacity to this project.
- Functional users will have time to be involved in analysis and training.
- Strong executive backing.

**Major Project
Risks**

- The single greatest risk of this project is that there will be push-back to removal of mods. Resilient and consistent support from leadership on campus will be required to mitigate this risk. Every modification that is justified or allowed to be kept puts the project in danger of not being successful.
- Opportunity cost. While work is being done on this project other areas of support will need to be sacrificed or accept a slower response. Accept and mitigate through escalation and leadership.
- Temporary increased operational costs to functional areas if significant automation is removed or changes need to be made. Accept and planning.
- Some data may need to be archived, become unavailable, or moved to another system as it won't have a home in Banner anymore. Mitigated through analysis and planning.

Stakeholders

Executive Support

| | |
|-----------------|--|
| Greg Hamann | President |
| Ann Buchele | Vice President, Academic Affairs and Workforce Development |
| Bruce Clemetsen | Vice President, Student Affairs |
| Dave Henderson | Vice President, Finance and Operations; Project Sponsor |
| Michael Quiner | Chief Information Officer |

Data Owners

| | |
|-----------------|--|
| Danny Aynes | Director, Enrollment Services; Registrar |
| Jess Jacobs | Director, Accounting & Budget |
| Elaine Robinson | Director, Financial Aid |
| Scott Rolen | Director, Human Resources |
| Sally Widenmann | Dean, Instruction |

Analysts (aka Super Users)

| | |
|-------------------|--------------------------|
| Bernie Jones | Accounting Specialist |
| Sandra LeHoullier | HRIS Analyst |
| Frank Lister | |
| TBD | Academic Affairs Analyst |

Application and Systems Programming Team

| | |
|------------------|--------------------------|
| Gabriel Williams | Manager; Project Manager |
| Marc Haerling | DBA |
| Kim Dammon | Programmer |
| Carl Rhodes | Programmer |
| Tyler Lafferty | Programmer |
| Teresa Patterson | IS Support |
| Lorrie Peterson | IS Support |
| Lena Spencer | Admin Assistant |

Functional Users

Administrative Users and Subject Matter Experts (SME)
Faculty
Students

Appendix J: Distance Learning Strategic Initiative

Distance learning needs a strategic focus at Linn-Benton Community College to improve completion and enrollment.

A successful traditional distance learning program would consist of the following:

1. Completion rates equal to or better than the equivalent F2F course. Currently, the completion rates for the worst 20 DL courses are 9-30% lower than the equivalent F2F courses and DL courses in general have a lower rate. 687 more students at LB would have completed 2404.5 credits for a savings of \$240,450 in the last 3 years if F2F and DL rates were the same.
2. Distance learning FTE would be 20% of the credit FTE at Linn-Benton. Currently it is 6% and has been flat for the last 4 years. The average at the other 16 community colleges is 20%.

The first phase of a strategic initiative would focus on completion, the second phase on enrollment growth.

Phase 1

A completion committee of faculty, staff (from admissions, curriculum, Banner, testing, IR), and deans would develop a set of holistic strategies and policies to improve completion.

1. The strategies would focus on good fit, strong instructor presence and strong institutional support.
 - a. Good fit is helping the student decide whether taking a DL course is a good fit for them by the refund drop date. Discussions of good fit strategies might consist of a pre-course letter outlining expectations, mandatory login by Monday, substantial assignment due by Wednesday, time/date assignment, tracking of student first week interactions, administratively dropping students based on good fit criteria, required syllabus quiz.
 - b. Discussions of strong instructor presence might consist of frequent first week communication, identification/tracking and targeted communication for at risk students using LMS and SIS data, using course design principles that support completion such as mandatory course engagement with frequent self-checks, reinforcing emails from instructors, use of LMS data to identify course improvements, strong instructor presence and engagement guidelines.
 - c. Discussions of strong institutional support might consist of implementing a mandatory online distance learning orientation for students, tracking at risk students institutionally, required interventions prior to registration for students who exhibit at risk characteristics such as failing a previous online course or having a GPA of less than 2.00, reviewing institutional policies such as criteria for administrative drops (for example logs in only once in the first week), waitlisting and late registration for impact on completion, implementing a structured course development process, implementing guidelines and training for online teaching and evaluation, student services audit to ensure that DL students

are receiving the same access to services that F2F students receive, barriers to implementing a pre-course letter i.e. students not checking email, moodle courses having to wait for late grading before they can be made available, contract start days, proctoring

In 2014/2015 a distance learning faculty committee recommended and Academic Affairs approved the following recommendations

1. The college should set a goal of parity of success rates with F2F courses.
2. Departments/disciplines should have a review process for improving success rates while maintaining the course outcomes.
3. The college should review student services for online students and work towards parity.
4. The college should adopt a set of recommendations for a structured development and teaching process for online courses. Departments/disciplines innovating outside this process would be provided with encouragement but asked to also consult with the departments that might be impacted.
5. The strategies should reflect our goals of productivity (completion), Equity, Quality.
6. The college should take a holistic approach to improving success.

2015/2016 distance learning fund expenditures (around \$51,000 spent this year)

1. Paying faculty to participate in completion projects, wr 121, 122, CJ 105, MTH 60, 65, 95, HDFS
2. Paying to develop online teacher development courses
3. Paying to supplement DL conference. Use professional development funds first
4. Paying to develop and market CJ AAS fully online degree
5. Paying for a few OER projects
6. Zoom license

2016/2017 distance learning fund expenditures (\$5 per credit, \$55,000 revenue per year)

1. Paying faculty to participate in completion projects, redesign 15 courses
2. Paying to develop online teacher development courses, 3 courses
3. Paying to supplement DL conference. Use professional development funds first. ITC
4. Paying to develop and market CJ AAS fully online degree - eventually this will be a cohort model to encourage completion
5. Paying for a few OER projects
6. Zoom license - conferencing tool

Long-term proposed expenditures

Distance learning investments to support strategic plan

1. Redesigning courses with completion strategies, testing strategies - faculty overload or release time
2. Instructional design support for redesigning courses(faculty fellows)
3. Developing training courses for basic, intermediate, advanced, online teaching - paying course developer to develop and faculty to take courses
4. Sending faculty to conferences focused on completion

5. Learning analytics
 - Staffing to support learning analytics - IR, LMS, Banner, coordinator
 - Research & Retention Analyst
 - Learning analytic software
6. Institutional support needs
 1. student service's audit
 2. Student advising for online courses
 3. Success coaches
 4. Banner programming (working on developing in-house talent)
 5. Interventions such as tutoring, library, high touch contact with at risk students, mentors, etc.
 6. Proctoring service

Phase 2 of the strategic initiative process would be about increasing distance learning enrollments.

1. Fully online Degree/certificates
2. Strategic enrollment focus and growth ie guided pathways, summer courses for OSU students etc.
3. Business continuity

Supporting future online growth

1. Paying to develop and market strategic growth of online degrees and courses
2. Paying to train faculty to develop and teach new online courses.

Appendix K: Information Technology Update Plan

The objective of the College Information Technology Update plan is to maintain all information technology equipment at a level that supports the strategic goals of the college, in its operations, services, and instructional missions. The plan is designed to protect Linn-Benton Community College's investments in equipment, and minimizes future costs for maintenance and replacement, so that the sustainability of our IT infrastructure is preserved.

Equipment Inventory:

All technology equipment is physically inventoried on an annual basis, the inventory is maintained in a database which provides historic and current notes and statuses of college resources. The IS department is responsible for keeping the inventory records, and tracking the location, access, use, and operability of all computing, networking and media equipment used by college faculty, staff, and students. In addition, as new equipment is purchased and delivered to the college it is also inventoried as part of the staging and implementation processes. The campus inventory is updated as equipment reaches an end-of-life and is removed from use.

IS Equipment Analysis:

Our standard is that we evaluate any personally used, or publically accessible, workstation (desktop, laptop, or endpoint client) maintained on the college inventories regularly (after 4 years in service at the latest)

- The evaluation will be as to whether the device meets the requirements of its current use-case.
- If it is determined that the device is no longer capable of meeting the use-case requirements it will be either replaced or upgraded to meet the requirements of its deployment.
- Replaced equipment may find suitable deployment for other campus use-cases, or it may be removed from service and from the college inventory.

The college does not specify a set requirement standard for all college endpoints, as the technology landscape evolves so quickly and various use-cases come with such a wide field of specifications that a published standard is likely to fuel an "Exceptions based" model that will quickly be meaningless. Likewise, the time when an organization could make a clear age-based or time-period constrained usage and replacement policy is passed. The new standard is that all college IT assets must be reviewed and evaluated on their 4 year anniversary at a minimum.

Through the use of “roll-down” methods, computers are often relocated rather than replaced. For example, the Computer Science program requires more frequent upgrades to stay instructionally current, and as a result, it receives new computers more frequently than other departments. When their computers are replaced, their two-year old computers are reallocated to the Business Administration labs, which do not require the most current technology. This strategy provides updated computers to multiple program areas without purchasing a full complement of new computers each year. The maximum planned replacement cycle for instructional lab computers is four years. Funds to support this effort are provided from the college’s technology reserve fund. Standards for academic technology replacement are reviewed and revised by the affected program faculty, deans and staff from information services.

The final goals of the Technology Replacement Plan are to: 1. Assure that appropriate computing resources are available in computing facilities, classrooms, and college offices to support the mission of the college. 2. Assure that each faculty and staff member who uses computing resources in their position has a computer of sufficient capability to fulfill their job responsibilities.



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Section I

Organization of Campus Security

LinnBenton Community College is committed to information security to ensure the confidentiality, integrity and availability of its information systems and data. The coordinator of information security shall be the Information Services Director. The responsibility for daytoday management of campus security shall be distributed among administrators, faculty and staff members as defined herein.

The President's staff shall ensure their departments and divisions are in compliance with the Information Security Plan. The President's staff may delegate authority, responsibility and accountability to their appointed representatives. A yearly confirmation of compliance shall be required by each area.

Deans, Directors and Managers shall ensure that the guidelines set in the Information Security Plan are met. Specific guidelines may be established for his or her own data based on the assigned classification standards and specifics to their area. The responsibility for daytoday operations may be delegated to their staff members. The Deans, Directors and Managers are responsible for maintaining all required documentation requirements of this plan. A yearly confirmation of compliance shall be required each year.

The administrators of the data systems shall consist of network administrators and staff, application development administrators and staff, information services and any individual that owns paper or electronic data that is stored locally.

The data systems administrator (DSA) in each area has a responsibility to ensure they grant access to data to only those who require access to perform their job responsibilities. The business units that own the data must be familiar with the data content, and the methods for accessing that data for which they are responsible. The owners of the data in conjunction with the DSA shall develop a process for requesting access to their data.

A user is anyone with authorized access to data. Faculty, staff, student aids, managers, deans, and directors are all users of data. It is the responsibility of the user to:

- \$ Store data under secure conditions;
- \$ Make every reasonable effort to ensure the appropriate level of data privacy is maintained;
- \$ Use the data only for the purpose for which access was granted;
- \$ Not share ID's or passwords with others;

\$ Securely dispose of confidential data;

\$ Abide by this Information Security Plan and Identity Theft AR 509001

Section II

Campus Wide Security Guidelines

The following guidelines shall serve as a framework for the campus security program. Specific controls that may be required by department or division may be incorporated into the plan and documentation for those controls shall be made available upon request for audit purposes. All processes and procedures must adhere to the guidelines as outlined below.

Section 2.01

Access Controls

1. Access to information systems shall be based on the lowest level of least privilege required to perform one's job. This means that access shall be granted to individuals based on what is required to perform ones job with special privileges being reserved for those with a need to know.
2. Administrative access to information systems shall be strictly controlled to prevent unauthorized access. Individuals with administrative access shall use the privilege for administrative tasks only. Passwords for network accounts must be changed every 3 months.
3. In the event that an employee changes job functions, access controls will be reviewed and changed as applicable to the new job function within 3 business days of notification. When an employee leaves employment with LBCC, their accounts will be locked out as of their last day of work.
4. An audit trail shall be maintained to record all access granted, modified or removed. Periodic checks will be performed to assure the procedures are being followed and maintained.

Section 2.02

Securing Offices, Rooms and Facilities

1. Offices that have locks shall be locked at the end of each work day. In the event that the office cannot be locked, all confidential information shall be locked in file cabinets or drawers.

2. All confidential information shall be cleared from the desk or other visible area within the office while not in use.
3. Doors and file cabinets shall be locked in the evening.
4. Workstation computers shall be turned off at the end of each work day or utilize a passwordprotected screen saver. At a minimum, workstation computers should be rebooted once each week.
5. Keyboards shall be locked or a passwordprotected screen saver shall be used to protect the workstation from unauthorized access while away from the desk. The idle time for a passwordprotected screen saver shall be set to 15 minutes or less. (To lock your keyboard, press CTRL – ALTDEL and then click on Lock Workstation)
6. Open areas where confidential information is accessible shall be supervised at all times during normal work hours.
7. All information systems hardware and media that contains protected information will be located in areas that are protected from physical intrusion, theft, fire, flood, excessive temperature/humidity or other hazards.

Section 2.03

Storage and Distribution of Data

1. All information classified as confidential shall be placed in locked file cabinets when not in use. A notice of confidentiality of information contained in these documents must be used. This may be part of the printed form such as “confidential when this form is filled out.”.
2. All printed confidential data that has expired its retention period shall be shredded or placed in a locked secure disposal bin. Shredders and bins will be available throughout the college for this purpose.
3. Electronic files contained on hard drives or removable media shall be destroyed prior to redistribution by the Information Services Department.
4. A written procedure shall be in place for the release of confidential information. A separate procedure shall be followed in the case of discovery or litigation surrounding the release of electronic or paper information. (See Section 4.047)

5. PDF files shall be created for all policy and guidelines posted on the LBCC web site or distributed via electronic format.
6. Output from systems containing information that is classified as being sensitive or critical shall carry an appropriate classification label in the output.
7. Retention periods shall be based on the Oregon Secretary of State Archive Rules. A written process shall be in place for the verification and notification of expired retention periods.
8. All hardware being disposed of shall go through the process as defined in the Business Office for disposal of assets. An audit trail shall be maintained to record the disposal of all assets.

Section 2.04

Hardware Disposal

1. IT equipment and media shall only be disposed of by authorized Information Services personnel. All hardware being disposed of shall go through the process as defined in the Business Office for disposal of assets. IT equipment or media being disposed of or reassigned shall be evaluated and all protected information purged prior to reassignment or disposal.

Section 2.05

Printers

1. Protected information shall not be sent to a network printer in an unsecured area without appropriate physical safeguards or an authorized person present to safeguard the information during and after printing. For example: If a printer is in an open area, such as in the Business Office, place it in an area that is accessible by authorized users only, such as behind a staff member's workspace.

Section 2.06

Passwords

1. Users must change network access passwords every 90 days. The password strength is a minimum of 8 characters. Password guidelines are subject to review and may change.
2. The account lockout for active directory accounts is set to 10 attempts and 24 passwords are remembered and cannot be reused.
3. The Banner application is password protected and can only be accessed from a workstation inside the LBCC network.
4. Each contracted employee will be assigned a unique user ID. If a generic ID is an operational necessity, passwords will be changed by the Banner Information Support Specialist on a quarterly basis. For audit purposes, a record of the authorized persons and their access rights or privileges shall be maintained for a period of 3 years.
5. Access to college policy is available via the college web site and a reminder shall be distributed on a yearly basis to all faculty and staff.
6. At no time shall employees share passwords on their user accounts.
7. Authorized users shall be reviewed annually by the system owner and updated accordingly.

Section 2.07

Wireless Access

1. Wireless access points exist within the college for student access. To obtain a wireless account, a person must be a registered student or currently employed by the college. Guest accounts may be obtained by college employees for guests. This is a public wireless network and should

not be used for official college business that includes sensitive or confidential data.

2. Faculty and staff members shall not set up wireless access points in offices. Access to the LBCC secured wireless is available by contacting Information Services.

Section 2.08

Removable Media

1. Removable media, such as CDs, diskettes, USB drives, that contain protected information must be stored in a secure location when not in use. Only authorized users have the right to remove any confidential information from the College premises.
2. Campusprovided mobile devices shall not be used for activities unrelated to LinnBenton organizational goals. This includes but is not limited to lap top computers, tablets, smart phones and projection units. College officials will document who is in possession of each device and that the individual understands his responsibility for the confidentiality, integrity and availability of the information on the device. The individual assigned to the computer must also make sure that data backups are maintained, anti virus software is uptodate and that operating system patches are applied in a timely manner. The individual is also responsible for the security of said systems at any time.
3. Confidential College data shall not be downloaded to personal devices such as laptop computers, cell phones, smart phones and tablets.

Section 2.09

Communications and Operations Management

1. Network administrators responsible for the campus network and information systems shall work in conjunction with the individual system owners in accordance with the Information Services department standard guidelines to ensure confidentiality, availability and integrity of the information systems.

Section 2.10

Compliance

1. LinnBenton will comply with all compliance issues including but not limited to Health Insurance Portability and Accountability Act (HIPAA), Gramm Leach Bliley Act (GLBA), Family Educational Rights and Privacy Act (FERPA), Communications Assistance Law Enforcement Act (CALEA), and the Payment Card Industry (PCI) as applicable to the institution.
2. LinnBenton will inform its employees of such regulations as it applies to their job description. LBCC will require faculty and staff to acknowledge compliance with the regulations as it applies to their job function.
3. LinnBenton Student Services will inform students of their rights under FERPA.
4. LBCC shall require all third parties and temporary employees to execute a confidentiality agreement when engaged in the use or disclosure of confidential information.
5. All faculty, staff and students shall treat their passwords as confidential information.

Section 2.11

Policy and Guidelines for Accessing System Resources

1. LinnBenton faculty, staff and other authorized persons will comply with the LBCC Board Policy 5075 and Administrative Rule 507501 (Guidelines for Using Computers and Related Resources). Copies of board policies and administrative rules are available on the paperless office link of the LBCC website.

Section 2.12

Social Security Number Usage

1. LinnBenton has discontinued the collection of Social Security Numbers except where necessary for employment records, financial aid records, and other college and governmental transactions as required by law or to satisfy a college requirement.
2. LinnBenton is utilizing a unique identifier (X number) for all faculty, staff and students to be used to identify, track and service the individual in paper and electronic format.
3. LinnBenton shall follow the appropriate controls for disclosure of Social Security Numbers. SSNs should never be included in email communications.
4. LinnBenton shall ensure that no new systems purchased or developed use the Social Security Number as the key.

Section 2.13

Retiree and Parttime Email

1. All retirees will have the right to request Information Services to continue their college email id. Retirees will be contacted annually by email to verify that they still wish to continue using their id. A nonresponse will be considered as a no and the id will be discontinued.
2. Part time faculty and staff email ids continue for the academic year in which they were hired. Administrative assistants are contacted annually to verify continuation of employment.
3. The college email account is not to be used for personal benefit or to the detriment of the college.

Section III

Human Resource Security

1. Background verification checks for employment, contractors and thirdparty users should be carried out in accordance with relevant laws, regulations and ethics and proportional to the college requirements, classification of information to be accessed and the perceived risks which may include character references, confirmation of academic and professional qualifications and identity check. Procedures should define the criteria and limitations of verifications, who is eligible to screen people and how.
2. The Human Resource Department will notify Information Services for contracted employees when they are hired or separate from the college.
3. All employees must fill out and sign a logon request form available on the paperless office. This must also be signed by the supervisor for the creation of network, email and Banner user accounts and is kept on file as an audit trail.
4. Upon termination of an employee, the Information Services Department shall be notified by Human Resources and network, email and Banner accounts disabled as of the last day of work.
5. All employees or contractors shall return all assets to LBCC upon termination. This includes but is not limited to software, institutional data, , portable computer equipment, credit cards, access cards, keys, information stored on electronic media, cell phones and other such assets.
6. Information security training and awareness will be implemented for all faculty and staff, including temporary employees. Such programs will be reviewed and updated on a yearly basis. If an employee's job function changes, the employee will be trained on security measures for that position. All new employees will be informed of such programs and will be provided with appropriate guidelines upon hire. Training programs shall be developed for new employees by the Information Services department.

7. Departmental training specific to the employees job function shall be the responsibility of the designated manager or supervisor.

Section IV

Information Technology

Section 4.01

Communications and Operations Management

1. All information system networks will be designed and configured to deliver high availability, confidentiality and integrity to meet college needs.
2. Network administrators responsible for the campus network and information systems shall work in conjunction with the individual system owners in accordance with the Information Services standard guidelines to ensure confidentiality, availability and integrity of the information systems.
3. All network hardware, software, applications and communication systems shall be configured to protect against both physical attacks and unauthorized network intrusions. All servers and workstations shall run information security software, such as antivirus, as recommended by the Information Services Department. In the event that a system will not operate properly with antivirus or other security software, appropriate safeguards shall be instituted.
4. Documentation of operating procedures shall be maintained and available for all users who need them. This shall include backup, scheduling requirements, instructions for handling errors or exceptional conditions, support contacts, special output and media handling instructions, system restart and recovery procedures, audit trail and system log information.
5. Change management shall include the identification and recording of significant changes, planning and testing of changes, assessment of impact, including security implications of such changes, communication of change details to relevant parties and fallback procedures.
6. Routine backup procedures shall be performed and documented. Accurate and complete records of backup copies and restoration procedures shall be produced. Backups shall be stored in 4 locations and

rotated on a weekly basis with at least on location in a secured remote location. Backup media should be tested annually.

7. Disposal of information system software shall not occur unless the disposal is authorized by the appropriate staff, the information system software is no longer needed, and its related data can be archived and will not require restoration in the future.

Section 4.02

Information Systems Acquisition, Development and Maintenance

1. LBCC shall develop and implement written technical standards to ensure the confidentiality, integrity and availability of the data stored on its information system. All equipment and software purchased or developed shall adhere to these standards. The standards will be reviewed annually or more frequently if deemed necessary.
2. All proposed information systems to be purchased shall be submitted to the person designated by the Information Services department for review for adherence to security standards, and approval prior to purchase.
3. All equipment, systems, software, upgrades and patches shall be fully and comprehensively tested and authorized by IS management prior to being put into a “live” environment. In the event that a test environment is unavailable, upgrades and patches shall be applied upon verification of vendor testing and confirmation of support for such upgrades and patches. A procedure to “roll back” from upgrades and patches shall also be in place.
4. Standards should be reviewed no less frequently than every 2 years and revised if necessary to ensure adherence to industry best practices. Systems that do not meet newly revised standards may be grandfathered until a replacement or update can be planned and implemented.

Section 4.03

Purchasing and Maintaining Commercial Software

1. In order to comply with applicable laws and to ensure ongoing vendor support, LBCC shall make every effort to ensure that all terms and conditions of End User License Agreements (EULA) are strictly followed.
2. Every effort will be made to resolve software problems efficiently and within an acceptable time period. Updates to the application software will be installed in a timely manner to ensure the integrity of the data.
3. Disposal of information system software shall not occur unless the disposal is authorized by the appropriate staff, the information system software is no longer needed, and its related data can be archived and will not require restoration in the future.

Section 4.04

Developing and Maintaining Custom Software

1. LinnBenton has implemented a procedure in which only authorized staff may access operational program libraries and program source libraries. All changes to systems, source code and operational program libraries shall be authorized and tested before moving to the live environment. Amendments to operational program libraries should only be made using technical access controls.
2. A procedure have been implemented in which all software developed for systems identified as critical to campus operations must always follow a formal managed development process appropriate for the size and scope of the system.
3. All systems should implement a procedure in which all new and enhanced systems are fully supported by comprehensive and recent documentation. New or upgraded systems should not go live unless supporting documentation is available.
4. LBCC shall implement a procedure in which proper segregation of duties be ensured for all areas dealing with system development, system operation, or system administration.

5. Adequate controls for the security of protected or restricted data shall be used in the testing of new systems or system changes.
6. Users and technical staff will be trained in the functionality and operations of all new systems.

Section 4.04

Information Security Incident Management

1. All information systems that contain protected information shall be configured to log all information necessary to detect and record attempts of unauthorized access and system errors, to the extent that the logging capabilities exist. The log files must be examined in a timely manner by qualified IS staff and security incidents shall be reported to the Information Services Director for appropriate action.
2. All ports not required by the system or application to function correctly shall be closed.
3. The college must contract for PCI scanning and correct any insecurity problems discovered that cause the scan to fail in a timely manner.
4. A written process shall be defined for the configuration, adds and changes made to the firewalls, routers, switches, servers and other network infrastructure and security systems.
5. The network infrastructure and servers that contain protected information shall be actively monitored for anomalies. Intrusion detection and intrusion prevention tools shall be implemented to ensure the confidentiality and integrity of the data.
6. Access controls for information systems shall be in accordance to the value and classification of the information being protected.
7. A procedure has been developed for authorizing remote access of LBCC information systems by faculty, staff, students and vendors using Virtual Private Network (VPN) access. Standards shall be established to ensure

accurate authentication of remote users and the integrity and confidentiality being transmitted.

8. A written procedure shall be distributed to all faculty and staff related to the disclosure of information for general requests for information and in the case of litigation or discovery. Compliance to state and local laws will be followed and the appropriate documentation maintained by the Information Security Department and affected college department.
9. A procedure to provide access to electronic information on an emergency basis shall be developed. (e.g., an employee is incapacitated and another employee must access the system to continue job functionality). For audit purposes, each instance of such access shall be documented and maintained in the employee's HR file for 3 years if the information accessed is protected information.

Section 4.05

Securing Offices, Rooms and Facilities – IT

1. Physical access to the server rooms and network infrastructure closets shall be protected using reasonable protective safeguards.
2. Plans shall be in place to respond to and protect against environmental and external threats such as fire, water leaks, electrical outages, loss of cooling and weatherrelated issues. Documentation shall be available to all designated responders as to the plan.
3. All computer or open lab areas shall be locked when not in use.
4. All network cabling shall be secured to prevent unauthorized interception or damage.
5. All information systems identified as critical to LBCC operations shall be protected by an uninterrupted power supply to provide continuity of services and provide an orderly shutdown of information systems to preserve data integrity. IP telephony servers must have 4 hours of uninterrupted power supply time available.

6. The LinnBenton Public Safety Office shall monitor campus activities on a 24 x 7 basis. Security cameras are in place to record activity around the college.

Section V All Divisions

The intent of the Information Security Plan is to provide confidentiality, integrity and availability of information that LinnBenton Community College collects, stores, distributes or utilizes in order to provide a safe learning environment for students. This document is to be used in conjunction with the individual board policies of the college and all rules and regulations that stem from governing bodies of the college.



Linn-Benton
COMMUNITY COLLEGE



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Introduction

The objective of this report is to provide a strategic, management-focused perspective on the status and direction for Information Technology (IT) at Linn Benton Community College. Virtual Information Executives (VIE) prepared this report based on interviews with LBCC personnel (list included in Appendix A), review of existing documents, and our understanding of best practices working with colleges of similar size and focus. Think of this document as a model for creating a successful and sustained IT capability.

Linn-Benton Community College is located in Albany, Oregon and has a mission “to engage in an education that enables all of us to participate in, contribute to, and benefit from the cultural richness and economic vitality of our communities.” The college has an informal IT plan in the form of planned projects and it is developing an IT strategic plan to meet the College’s objectives and adopt industry best practices. The college wants VIE to provide insight into how the organization compares to its peers, including specific recommendations for improvement, and a comprehensive view of the key strategies being pursued in the higher education industry.



Executive Summary

Like most community colleges, LBCC is facing a number of challenges, with information technology as a core ingredient for sustained success. The college is working to employ an improved “Student Success Pathway” and to improve the management of capital construction projects. Both of these strategic initiatives can be leveraged by the best use of information technology, automated processes, and data. Another key strategy is to get the most value from current technology investments while improving services to faculty and students. Specifically, this includes improving management and use of the Banner information system and deploying and integrating additional information systems.

The Information Systems (IS) department at LBCC has a core of skilled and capable staff. However, like most organizations, there are a number of practices and procedures that evolved organically over the years and should be periodically reviewed and improved to meet new demands and an ever shifting technology landscape. There are increasing demands on the IS department to maintain a stable, reliable, and responsive environment, while deploying new technology and managing new projects. This can only be done with clear leadership and planning.

The college has grown steadily but much of the technology work is done informally using older procedures. The time has come to upgrade the IS department to meet today’s and tomorrow’s demands for technology and services.

We recommend pursuing a number of strategies to improve the support for technology, maximize the investment in technology, and take advantage of technology innovations to improve academic and administrative processes and outcomes. We recommend the following three-year roadmap:

Strategic benefits are identified in the following groups of initiatives:

| | |
|------------|--|
| SI | Strategic IS Improvements |
| ISP | IS Process Improvements |
| RSK | Improve Information Security and Risk Management |
| RC | Reduce Costs |
| ISS | Improve Student Services |
| IBP | Improve Business Processes |

| Timeframe | Activity | Strategic Benefit | Resources |
|------------------|----------------------------|--------------------------|--------------------------------------|
| | Deploy IT governance model | SI | Michael |
| | Complete IT strategic plan | SI | Michael, Gabe, Russ, Steve, Jonathan |



| | | | |
|---------|--|----------|--|
| 2016/17 | Begin IT disaster recovery plan | RSK | Michael, Russ, Vern, Gabe, Steve, Jonathan |
| | Begin Distance Learning and Instructional Technology strategic plan | SI | Michael, Steve |
| | Continue iLearn project | ISS | Steve |
| | Inventory Banner baseline mods, develop decision methodology | ISP | Gabe, Banner team |
| | Begin migration to Banner baseline | ISP | Gabe, Banner team |
| | Begin creation of IT metrics | ISP | Michael, Russ, Gabe, Steve, Jonathan |
| | Complete feasibility study and planning for new LMS (if recommended) | ISS | Steve |
| | Begin migration to new LMS (if selected) | ISS | Steve, Media team |
| | Begin identity management project | ISS | Russ, Vern, Gabe, Jonathan |
| | Begin implementation of Degree Works | ISS | Gabe, Banner team |
| 2017/18 | Complete creation of IT metrics | ISP | Michael, Russ, Gabe, Steve, Jonathan |
| | Begin migration to Banner XE | ISP, IBP | Gabe, Banner team |
| | Begin IT Security Policies | RSK | Michael, Gabe, Russ, Vern |
| | Complete IT Disaster Recovery Plan | RSK | Michael, Russ, Vern, Gabe, Steve, Jonathan |
| | Complete the iLearn project | ISS | Steve |
| | Complete Banner baseline project | ISP | Gabe, Banner team |
| | Complete migration to new LMS (if selected) | ISS | Steve, Media team |
| | Continue identity mgt project | ISS | Russ, Vern, Gabe, Jonathan |
| | Continue Degree Works project | ISS | Gabe, Banner team |
| | Begin implementation of data warehouse | IBP | Gabe, Banner team, Russ |
| | Complete IT security policies | RSK | Michael, Gabe, Russ, Vern |
| | Begin conversion to VDI | RC | Russ, Desktop support team |
| | Complete Degree Works project | ISS | Gabe, Banner team |



| | | | |
|---------|------------------------------|-----|-------------------------------|
| 2018/19 | Complete identity management | ISS | Russ, Vern, Gabe, Jonathan |
| | Deploy mobile apps | ISS | Gabe, Russ, Steve, Media team |
| | Complete data warehouse | IBP | Gabe, Banner team |
| | Implement Web Time Entry | IBP | Gabe, Banner team |
| | Develop an SLA | ISP | Michael, Gabe, Russ, Steve |



IT Programs, Projects and Plans

Careful planning is critical to succeed with strategic projects and to manage scarce financial and personnel resources. A standard project planning methodology should be employed for all major projects. It should identify sponsors and should involve stakeholders. There should be a single project leader, not a committee. The project leader does not have to be in the IS department, but should be someone with solid project management skills and experience. The plan should identify benefits, risks, relationships to other projects, major tasks and phases, total initial and ongoing costs, and internal and external personnel resources.

The prioritization and funding of major projects should be done with input from the IT Governance Committee. Once projects are planned, funded, and scheduled, it is important for the IS department and/or the project leader and sponsors to communicate the status of the project activities regularly. Over time, you will gain institutional trust in project planning and management methodologies by having a transparent process.

There are a couple of fairly skilled project managers in the IS department, however this skill should be expanded. For a school the size of LBCC, it is not feasible to have a formal Project Management Office that would have responsibility for the success and integrity of planning and management. **We suggest that four or five people in the IS department, and perhaps one or two key departmental staff, work together to develop standard templates and tools for planning and management and engage in training to develop their skills.**

The CIO has done a good job of identifying a list of important projects for the next few years. This is a good starting point for strategic planning and governance. We would like to comment on several important projects.

- ***Mobile Applications***

This is an important project that will provide clear benefits to students. It is not a large or complex project, but it will require careful planning, management, and communication. The technology is fairly mature and the risks are not high. Many schools are tackling this type of project.

- ***Identity Management***

This project is technically complex but very important to provide a foundation for the future. A strong identity management platform will allow the use of fewer user IDs, a key user benefit. It will also ease security administration on the backend and improve security. Due to the complexity this project will require robust planning and strong leadership. It should be broken up into phases, and the college should consider outsourcing project management.



- ***iLearn Project***

iLearn has been in production for about a year, however it only serves a small, but growing, number of students. One of the major barriers to success will be the difficulty in interfacing the new system with Banner for registering students, awarding financial aid, and transcribing courses and grades. A new student information system would be expensive, not only to license, but to manage in parallel with Banner. It may be possible to leverage the flexibility needs of Community Education along with iLearn to improve the return on such an investment. We recommend that LBCC establish a timeframe for solving these problems and getting beyond a limited scope application. If this cannot be done, the college should consider abandoning this project.

- ***Data Warehouse***

A data warehouse would be very valuable to LBCC and would support its desire to have more data driven decisions. There is currently a large amount of data within Banner and other disparate systems, but there is a lack of integration, logical views, and a good reporting and presentation tool. The ODS product from Ellucian is a good solution. This project will have to be carefully planned and managed and the Institutional Research Department will have to be enlisted as a key sponsor and stakeholder.

- ***Learning Management System***

There is some dissatisfaction with the current Learning Management System (LMS), Moodle. There is also a recognition that there might be a better solution for the college that is better aligned with its major transfer institution, Oregon State University. A committee has begun studying the issue and will ultimately make recommendations. It is crucial that a project leader or a core group develop comprehensive plans for this type of transition that includes strategies for helping faculty transition their courses to a new platform. From our experience, there is always a great deal of resistance to this type of institutional change and it will take time and careful coordination.

Recommendations:

1. Make sure that all major technology projects are carefully planned and professionally managed.
2. Utilize the ITGC to prioritize, schedule, fund, and support major projects.
3. Develop better project management skills in the IS department and in other departments at the college.



IT Organizational structure and capabilities

For a medium sized college IT department, the Information Systems team is doing a good job. The departmental leaders (Michael, Gabe, Russ, Jonathan, and Steve) are all very skilled and experienced and are working hard to make improvements while keeping the ship afloat. There is a good amount of innovation and energy within the department. We do not recommend a change in who the CIO reports to. His reporting to the Vice President for Finance and Operations seems to be working well and the Vice President and the CIO both have a commitment to providing a high level of technology support throughout the college. It is important for Michael to continue to serve on the President's Council in order to develop a shared strategic technology vision.

Funding for additional positions is very limited and the department has done a good job of trying to meet demands with existing staff. However, there are a number of factors that are putting increasing pressure on the department. The technology environment is becoming more complex and it requires more time to manage. Most college programs and departments have become very dependent on systems and applications and there is a high expectation for stability and reliability. The rate of change is increasing as new opportunities arise and existing systems are constantly upgraded and enhanced.

The Banner team has some new staff, including the manager of the department. The new manager, Gabe Williams, is trying to incorporate some important new procedures in the way work is done. In the past, the IS staff did most of the Banner work at all levels of the application. Most Banner schools have developed a shared responsibility model where the end users are responsible for operating the system and for testing the functionality with upgrades and enhancements. They also read release notes carefully, looking for ways to leverage the Banner investment by utilizing new features to improve business processes. The IS staff is responsible for maintaining the database and making sure the software is functioning properly. Gabe is making this transition, however there is some resistance within the user community by people who see it as increasing their workload. We believe this is an important change and should be continued despite resistance.

The workload within the Banner team has increased considerably as they are working to apply all the neglected Banner upgrades, trying to bring the system back to baseline in preparation for the next major release, reducing the number of duplicate ID's, whittling away at customer requests (CSR's), helping with major projects, and improving communication within the department and with customers. **While we know that it is difficult for the college to fund additional positions, we recommend adding one more person to the Banner team.** Eventually, there should be one person who is a specialist for each of the main Banner modules (Student, Financial Aid, Finance, and Human Resources). In addition, each of these specialists should have someone on the team who can back them up in their absence. In the long run, the Banner team will gradually transition from programmers to integration specialists as you move back to baseline and more systems are acquired that must integrate or share data with Banner.



The IS Network Systems Manager, Russ Rinker, has responsibility for all college networks, including the wireless networks; for the telephone and voice mail systems; for all desktop systems; for classroom and lab computers; and for an employee helpdesk. This work is all done with just fourteen people. Russ has ten direct reports and, with his vast technical knowledge and history with the college, he spends a lot of time assisting each of them in their daily work. **We believe that a better model, and one that is more common in higher education, is to have another manager who reports to the CIO and is responsible for networks and the telephone systems. This would provide a better balance of work between the two teams.** The support team would be more customer facing and would be responsible for maintaining desktop systems and operating a helpdesk. We recommend that these organizational changes be planned over the next couple of years in preparation for Russ's retirement. Vern Smith, the current network support manager, might be a good candidate for the new position.

Within the desktop support group, the technicians support an average of 300 workstations each, and this ratio will increase as new buildings and sites are brought online. While this is a high number, Russ has done a good job of trying to mitigate the impact on the team. He has deployed remote support and management tools, which allow the techs to configure and troubleshoot systems without having to travel to the customer site. He is deploying more reliable solid state systems and he is considering using virtual desktops, which would move much of the processing from the desktop to networked servers. All of these innovations have helped the team continue to provide a high level of customer service.

The media team was recently moved to the IS department. There are clear advantages to this change as media techs need to work closely with the network support staff and the IS desktop technicians, as well as students and faculty. As necessary, the other technicians can also be leveraged to back up the media group with emerging video technology and classroom equipment. We did not see any key institutional strategies associated with the growth of Distance Learning, but if that becomes a priority in the future, it might be advisable to move the responsibility for development and support of distance and blended courses to the Vice President of Academic Affairs and Workforce Development. However, we recommend leaving the media technical support staff in IS.

The bond construction projects have a one-time and an ongoing impact on the IS staff. During planning and construction, they spend a lot of time with new networks, telephone systems, office systems, and classroom technology. Because of this impact, many schools fund temporary IS positions from bond funds to support new construction in the same way the bond pays for architects and construction personnel. We recommend that LBCC consider augmenting the IS staff on a temporary basis to help directly with bond projects.

It would be beneficial to explore better linkages between the IS Helpdesk and the Student Helpdesk in the Library. For example, there may be common training opportunities or procedural practices that could benefit both groups. They also may eventually want to use a common ticketing and tracking system. While they are supporting different populations, their knowledge of technology is often the same.



As at all colleges, the IS department must continue to balance scarce resources to address day-to-day operational and management issues while working on strategic projects and improvements. It is important to find a sweet spot for innovation and risk management. The department should position itself back from the leading edge, but well ahead of the middle tier of institutions. The department should continue finding ways to communicate with the college community about their activities. This will improve support for the department and trust in their decisions. There is a recommended organizational chart in Appendix B.

Recommendations:

1. Continue to support Gabe William's efforts to move to a shared responsibility model for the use and management of Banner.
2. Try to find funding to add one more person to the Banner team.
3. Develop a succession plan for when Russ retires in the next couple of years.
4. Move toward a better organizational configuration, as recommended in Appendix B.



IT Governance

IT Governance is the effective prioritization, planning, and decision making around IT resources. The purpose of IT governance is to direct IT efforts to ensure that the following objectives are being met:

- Strategic alignment of IT with the goals of the institution
- Value delivery to the organization and to students
- IT resource management
- Risk management of initiatives and mandates
- Performance management of initiatives and mandates

The new Information Technology Governance Committee (ITGC) has a very important role in developing and supporting strategic initiatives and projects related to technology at LBCC. The charter of this group should be focused on just a few activities. Its primary work should include the following:

1. Comment on and approve the Information Technology Strategic Plan. This plan should be reviewed and updated annually by the ITGC. The governance committee should ensure that the strategic plan is well aligned with institutional goals, strategic objectives, and with the activities of MERIT. Also, the ITGC should advocate strongly for the plan and make sure that college-wide activities are discussed and planned with the IT strategies in mind.
2. Help prioritize and schedule major IT projects for a three-year period. This list of projects should be part of the strategic plan and should be updated each year with new projects and modified priorities. The ITGC should also help develop funding packages to support the strategic IT projects. The IS departmental leadership team should prepare clear descriptions of these projects, including things like their benefits, risks, recommended priority, relationship to other college projects, impact of not doing, estimated costs, and impact on existing college resources. This will help the committee members, many of whom are not technically skilled, understand and prioritize the projects.
3. When necessary, the ITGC should review and recommend exceptions to the strategic plan. Planning is critical for setting long term goals and directions, but unexpected opportunities and challenges will sometimes occur that were not known when the plan was developed. These exceptions should only be approved if they are critical and the impact on other projects are identified and documented. The exceptions that this committee considers should be strategic and impactful and it should not spend time discussing smaller or operational issues.

The ITGC should not be involved with campus communication unless it relates to the IT Strategic Plan, the Strategic Projects, or exceptions it has approved. It should not address any technical issues, IS



management or operational issues, or business and academic processes. Also, it is not the role of this committee to serve as an innovation leader for the college. The committee should be advisory to the IS department, helping it apply limited funding and personnel to the most important strategic initiatives.

Eventually, if there is enough time, the ITGC could work with the CIO to identify several IT metrics to be used to measure the effectiveness of the existing technology and the key services provided by the IS department. This is not as high a priority as the three items mentioned above, but would certainly be valuable to the college. Once the key metrics are identified, the IS management team would be responsible for tracking and reporting them to ITGC once or twice a year.

The ITGC may occasionally need to get input from IS staff or from other college committees to help with their decisions. Since technology impacts virtually all college activities, the work of this committee is important to make sure the college is investing in the right technology and getting the most value from its investments. There may be pressure to ask the committee to address other, less strategic activities. We strongly recommend that the ITGC be careful to focus its attention solely on the strategic activities listed in this section. It may be necessary to create additional committees or task forces to address other technology issues.

The membership of the ITGC should be modified to better fit its role. We recommend that the committee chair be one of the college executives. The primary role of the CIO is to supply the committee with information to make decisions and to report back to the committee about the status of projects and plans. IS managers should be invited to meetings only when their input is needed. We recommend the following committee membership:

- Michael Quiner
- Dave Henderson
- Bruce Clemetsen
- Ann Buchele
- Elaine Robinson
- Danny Aynes
- Justin Smith
- Scott Rolen
- Jess Jacobs
- Justin Smith
- Dale Stowell
- Linda Carroll

In addition to the ITGC, the ASSC committee is very important to address smaller Banner projects. Gabe seems to be doing a wonderful job of using this group to help him prioritize and assign work and as a method of making his team's work more transparent and visible to his customers.



On the whole, the IS department should push technology innovations, ideas and strategies at the college. In the past, the department was viewed as a barrier to change and innovation. Its reputation has improved, but it should become part of the department's culture to advocate for new low-risk technology and improvements in business and academic processes.

Recommendations:

1. Improve the charter of the Information Technology Governance Committee with focus on three specific activities.
2. Modify the membership and the chair of the ITGC to make it more strategic and better able to achieve its goals.



IT Infrastructure

The LBCC IT technology infrastructure includes all of the technology assets supported by the Network Support team across five locations. This includes the LBCC wide area network, local area networks, the wireless network, the e-mail system, the security system, the data center, all of the associated server and storage systems, the security firewalls and remote access devices. It also includes management of the help desk, phone system management and desktop management services.

LBCC's Wide Area Network (WAN) includes a key data center location at the Albany campus as well as 4 other smaller locations including Benton Center, Sweet Home Center, East Linn Center and the Advanced Transportation Technology Center. The core of the network is located at the data center. This location is connected to the other locations through network connections at varying speeds and utilizing Comcast and NERO services. The Benton Center is connected via a high speed Gigabit connection and the other locations are connected via Internet based VPNs. Bandwidth in remote locations is adequate for the needs.

The local area networks are implemented on HP equipment, are installed locally in each building and have battery backup in most locations. The IT team has implemented Virtual LAN technologies to separate different types of network traffic needing its own lanes. Currently the Network team is wrapping up the task of installing battery backup in network closets to support the new VOIP phone system. This project will enhance the network availability for the college.

The telephone service for LBCC is provided via a Tadiran Aeonix private branch exchange (PBX) system. This system is new and is in the process of being installed. There have been many vendor-related challenges in the installation of this system. **This particular system was chosen due to an existing relationship with the support vendor. This is not a good reason to select a major telephone system.** The life of such systems is generally about 10 years. **We recommend that next time a replacement system be chosen from a list of major vendors such as ShoreTel, Cisco, Nortel and Avaya to reduce installation and support problems.**

The core LBCC IT applications are hosted on 17 physical servers at the data center. 9 physical servers host about 90 virtual servers using the VMWare virtualization software. The virtual servers include the usual mix of Active Directory servers, file and print servers and many different applications servers including Banner. The server infrastructure appears to be adequate for LBCC's needs.

Due to reduced footprint of the physical servers in the data center, the need for power and cooling has been reduced. Most of the physical servers have been converted into virtual servers. There is UPS battery support in the data center. In the event of a power failure these should be able to support the equipment for about 3 hours. This should be adequate for the most common power outages. Currently there is no backup generator installed. **The college might consider installing a generator as part of the disaster recovery plan for technology to increase availability.**



There are about 2100 users across LBCC . Most users access IT services through a mix of Dell and HP laptops and desktops. There are a smaller number of Mac users and other devices such as Tablets and 2-in-1's.

Currently 11 IT employees share the duties of staffing the help desk as well as performing systems and network upgrades and maintenance. Generally, users are very appreciative of the help they receive from this group. Sometimes these employees are stretched thin in providing help desk services and performing maintenance duties. The LBCC IT team has added resources gradually over the years. Overall the IT staff is adequate to provide help desk and network support.

The help desk ticket tracking tool is a web based system. It helps the staff keep track of service requests. This tool is not utilized sufficiently by staff due to the volume of work at the help desk as well as some resistance to change. This makes it extremely difficult to look at historical trends to eliminate persistent problems. This is a large problem for LBCC in understanding the true workload at the helpdesk and proper problem management.

Many of the employees in IS have been working in their roles for many years. This has created a sense of familiarity with the technology environment and a tendency to neglect creation and updating of documentation. In general, many employees also do this for job security reasons. We found the network documentation at LBCC to be very basic. **As the college grows its staff and especially as there is turnover in the next few years, it is important for LBCC to maintain adequate documentation on its technology systems.**

We found IT management processes to be ad-hoc and informal. It will be important for LBCC to adopt more formal processes in the future, especially as doing this will enable the IT teams to define metrics to measure the performance of the processes. We recommend that LBCC review the IT Infrastructure Library (ITIL) set of guidelines and adapt defined management processes such as Incident management, Problem management and Change management. Doing so will assure lower costs of support in the future and also provide justification for additional needed resources. The IT team should consider adopting service management methodologies in managing IT services. This includes defining services and service level agreements with clients.

Recommendations:

1. We recommend that LBCC strongly encourage the help desk team to log all tickets. The Manager should periodically look at reports to determine the source of persistent issues and work on proactively addressing these issues to reduce future help desk workload. Project work should be tracked separately and not on this list.
2. We also recommend that LBCC consider replacing its internally developed help desk system with a commercially available help desk system that is ITIL compliant
3. As LBCC scales up its IT infrastructure operations in the coming years, the IT Infrastructure Library (ITIL) set of guidelines should be considered for adoption. These guidelines if adopted will enable



consistent, stable and efficient operations of the IT infrastructure. Appendix C provides a good overview of these guidelines.

4. IT Staff should be encouraged to create and maintain good documentation on as built and current state of the infrastructure.



Software applications

For a medium sized community college, Linn Benton does not have a large inventory of application software. There are a few departmental systems that serve specific needs and some that must be connected to Banner, primarily to share data. Like most institutions, LBCC has developed a large number of small systems, Banner add-ons, and shadow systems. In most cases, these are the result of a perception that Banner and other existing systems cannot meet the unique needs of a department or the college.

As the college continues to evolve into a more student and community focused organization, there will be a need to acquire additional packages. There are a growing number of robust and affordable software solutions. Most of these will operate in the Internet Cloud and will not require hardware to run on campus. However, many of them will have to be integrated with Banner and with a campus-based authentication system.

Banner has been used at LBCC for about twenty-five years. The college has done a good job of utilizing it to support core business processes. However, as the system has evolved, much new functionality has been added and, for the most part, the college has not taken advantage of it. Also, many of the business processes that utilize Banner are not efficient and need to be redesigned. Gabe and Michael have a good vision for leveraging the considerable investment in Banner to get more value for the college. Their strategy is multi-faceted and includes:

- Apply all Banner upgrades and, in the future, apply upgrades soon after they are released.
- Examine all the home-grown Banner apps and shadow systems with a goal of eliminating most of them. This can be done by migrating the processes into Banner, by changing business processes, and when absolutely necessary, acquire or develop point solutions that can be maintained.
- Clean up the database by having solid processes for minimizing and correcting duplicate ID's and cleaning up addresses.
- Deploy additional Banner modules (Degree Works, Mobile Apps, Web Time Entry, ODS, etc.) strategically and carefully.
- Carefully, and in phases, migrate Banner to the next major release, Banner XE.

The two new Banner groups (ACCT and Banner Bunch) will prove to be very valuable in developing support and common strategies and keeping all the Banner users informed of the status of these important initiatives.



Recommendations:

1. Transition the Banner team's skills from programmers to integration specialists.
2. Continue with a number of initiatives under way, including keeping Banner up-to-date, moving closer to Banner baseline, and deploying additional high-value Banner modules.
3. Continue to communicate well and frequently with the user community about CSR's, projects, and other software issues.



Support for key business and administrative processes

In talking with several college administrators, we heard that the IS staff are very responsive and effective in responding to requests and problems but we also heard that they are slow and ineffective. This is a result of not having clear and consistent procedures for users and for IS support staff. In general, administrative customers know who to call directly. The quality of support depends on who you know and the relationships that have evolved over the years. LBCC has become large enough and dependent on technology that more standard procedures are needed.

The IS department is becoming more of a change agent by improving internal procedures, improving communication, leveraging technology investments, and planning for innovative projects. As a result, they will encounter resistance to change throughout the college community. **The IS leadership team should study change management techniques and work closely with their customers to try to mitigate the impact of change.** Communication and collaboration lies at the heart of successful technology changes. It is also important to have some key sponsors who can help address institutional resistance.

There should be a better Helpdesk operation in IS. You might want to consider identifying a couple of people whose primary job is on the helpdesk. There are advantages to having technicians work the helpdesk as they can better understand the technical issues. However, good helpdesk results require the customer service person to be an excellent communicator and problem solver and not all field technicians have those skills. It will continue to be a challenge to provide support during non-business hours. **The majority of problems should be reported to the Helpdesk, including most Banner problems. And they should all be logged in a tracking system that is visible to power users and that can be used to understand trends over time to inform improvements and investments.**

The Institutional Research (IR) department is aggressively trying to improve analysis and reporting at LBCC and is providing services to several other smaller colleges. While their strategies may not always be aligned with the wishes of the IT Governance Committee, they serve a very important role and often have shared goals with IS. **It is important for the innovative leaders in IS and IR to work closely together and leverage their skills to benefit the college.**

There are currently two Banner “power users” or “super users”, one in Human Resources and one shared between the Registrar’s Office and Financial Aid. **This is an excellent model and it should be expanded. The power users can bridge the gap between the IS Banner team and the administrative department they support.** These people are sometimes called Systems Development Managers at other schools. Their role is to be experts on the Banner application layer and help departmental users with Banner processes, problems, training, and improvements. They should help identify CSR’s and work with IS to prioritize and schedule the work. They should also attend Ellucian conferences and understand the benefits of future releases. Someone should be identified in the Accounting and Budget Office to serve



as their power user. In addition, Frank Lister should be assigned to either the Registrar's Office or Financial Aid and develop another power user for the other department.

There is a growing demand for an Internet of Things at LBCC. Increasingly, new HVAC systems, alarm systems, building access controls, fire alarms, and surveillance cameras must be connected to the college network and be managed from a distance across or between campuses. As new buildings are constructed, there will be more of these types of systems, and they will gradually be placed into existing facilities. The IS department should work closely with Public Safety, Facilities, and bond construction projects to make sure they can support these important systems.

Classroom technology is adequate. It is not on the leading edge and it could be improved, but this is largely a funding issue. There are standards for the classrooms, which makes it easier for the IS department to support and for faculty to use. New bond construction might sometimes provide opportunities for proof of concept for the introduction of new technology.

Recommendations:

1. Develop a more responsive IS Helpdesk that resolves problems for all types of customers, including Banner users. Use an automated ticketing system to assign work and produce statistics to aid with decision making. This will require a gradual shift in customer behavior, which can be accomplished with a combination of incentives and disincentives.
2. Continue to shift the responsibility to end-users for Banner application knowledge, testing, and problem resolution. Foster a model of having four power users in the Registrar's Office, Financial Aid, Human Resources, and Accounting and Budget.
3. Continue to collaborate closely with the Institutional Research Department. Linn Benton is lucky to have a strong IR group and they can work with IS to make some significant improvements in data driven decisions.
4. Assist the business units in improving their processes and moving away from a paper-based system of reports.



IT policies and procedures

There are very few written policies, procedures, and standards. This is not uncommon in smaller colleges where practices have evolved slowly and are dependent on institutional knowledge. As people leave and retire, though, it is difficult for new employees to come up to speed without some written guidelines and customers are not always served in a consistent manner.

Russ does a good job of capturing information in a knowledge base that is used by his team to research the history of certain types of problems or configurations. This is a valuable resource and the practice should be expanded to other IS teams. We suggest that Michael and his managers look for opportunities to better document and communicate procedures. This should not be a large project, but can be done gradually as situations arise.

The IS leadership team should become aware of the Information Technology Infrastructure Library (ITIL) and its guidelines for IT service strategies, designs, transitions, and operations. ITIL is the most widely accepted approach to service management. It provides a cohesive set of best practices, drawn from the public and private sectors internationally. See Appendix C for an overview of ITIL. It's not practical to just "adopt ITIL" – rather, use it as a guide to help design practices at the level appropriate for LBCC, and implement those practices over time based on the benefits provided. Many of these guidelines don't make sense for a small service organization, but they can be beneficial in setting goals and understanding how to think about IT organizational services.

It would be beneficial for the IS department to develop a Service Level Agreement (SLA). An older sample is provided in Appendix D. Clearly this sample is out of date, but the format and intent can be understood. The goal is to have a process and a document that represents an agreement between IS and their customers about what they can and cannot do. It will require a number of discussions internally and externally to find the right language that is service oriented but does not promise too much in the context of limited people, skills, and budgets. The SLA can be developed in collaboration with primary users and eventually approved by the Governance Committee. It should be updated once or twice each year. The process of defining IS services, documenting service request procedures, and defining levels of support is as valuable as the resulting document. It communicates to the college community exactly the IS department does and it aligns their expectations with what can be done.

Recommendations:

1. Gradually develop more written procedural guidelines and standards.
2. Expand the use of a departmental knowledge database.
3. Develop a Service Level Agreement that includes many of the customer facing services offered by IS.



IT budget and financial management

Based on our experience, the IS budget is within the standards for a college like LBCC. Michael should work with the Accounting and Budget department to collapse funding into fewer categories and provide more transparency about how funds are spent. Jess Jacobs is very interested in helping with this and improving college procedures for budget requests and management.

Not long ago, the college decided to centralize funding and purchasing for institutional software. This is a very good idea and will leverage limited funds to benefit the entire college. Currently, the IS department charges other departments for their desktop virus protection software. This, and any other chargeback procedures, should be eliminated. Funding for virus protection should be centralized along with other hardware and software.

Currently, desktop computer systems are replaced every 5 or 6 years. With the rapid evolution of this technology, the best practice in higher education is to transition to a four-year replacement cycle. The replacement cost of 25% of the systems at the college should be a baseline component of the IS budget. There are clear productivity benefits to employees, faculty, and students by having a more aggressive replacement practice.

With bond funded construction and remodeling, there is a significant resource requirement for IS staff to install, configure, and test new networks, telephone systems, classroom technology, desktop computers, software, cameras, etc. When feasible, the bond should pay for temporary technicians to work with the IS team to do this work. This will mitigate the impact on existing staff and ensure that other maintenance and project work can be accomplished on schedule.

Recommendations:

1. Eliminate all charge-back procedures for technology purchases.
2. Work toward funding a four-year replacement cycle for desktop computers.
3. Utilize bond funding for one-time technology installation, configuration, and testing.



IT performance and operational metrics

There is an interest at Linn Benton Community College in improving decisions with data and information, making it a more data-driven organization. There are several key metrics that should be developed, tracked, and communicated about technology and IS services.

Useful IT metrics fall into five categories: Customer Service, Operations, Applications, Financial, and Innovation. Appropriate measures can help improve performance, morale, and service. Without some basic measures, it is difficult to manage with data and improve in a meaningful and sustainable way.

Meaningful IT performance metrics will have the following characteristics:

1. Guided by Linn Benton's culture and values
2. Proposed by the CIO or senior management and approved by the IT Governance Committee
3. Proven to be actionable and drive behavior in the right direction – "Metrics That Matter"
4. Reviewed with the ITGC on a regular basis – quarterly or annually

We have seen many IT metrics programs over the years. Many have failed to help raise the bar. Here are some common pitfalls to avoid:

- Information Overload. Having too many metrics, and including ones that don't really drive behavior, can be worse than too few. Consider dropping metrics that never spark discussion or action.
- Activity Metrics. Metrics that show how busy IT is tend to be interesting but irrelevant.
- Perverse Incentives. Often metrics drive behavior in the wrong direction – for example, closing tickets quickly at the cost of customer satisfaction. Avoiding this problem requires a balanced approach and management emphasis on team values.

Once an SLA is developed as recommended in a prior section of this report, standard metrics can be developed to measure the service performance of the IS department relative to the SLA promise. Where possible, the service levels defined in the SLA should be measurable over time.

Also, if there were a departmental incident tracking system, it could be used to produce regular reports about the types of problems encountered and any trends. This is valuable information that can only be seen by collecting data and not relying on anecdotal conversations. This information can inform budget requests for more and better infrastructure, more staff, and staff training. It can also be used to measure employee performance and assist with individual goals.

In addition, the IS department should regularly report the status of major projects that are approved and scheduled by the IT Governance Committee. These reports should be communicated, not only to the ITGC, but to the college community as a whole as there are usually many stakeholders who are



involved with, or dependent on these projects. With good project leadership, there should be an expectation that most projects will achieve their goals and will be completed on time and within budget. If this does not occur, IS leadership and ITGC should take a look at their planning and scheduling to make sure it represents what can reasonably be done.

There are a number of other metrics that are in use in higher education, however it is often difficult to produce lots of information while focusing on managing and improving the technology landscape. We suggest that LBCC start with just one or two key metrics and, over time, develop more.

Here are some examples of common higher education IT metrics:

Customer Service

Employee Satisfaction. Measured by periodic survey. Consider designing/conducting the survey independent of the IT service providers being measured.

Issue Resolution. Measured by both First Contact Resolution and Time to Resolution.

Operations

Service Availability. Defined as the percentage of time critical services (as defined in the SLA) are up and running during scheduled hours of operation.

Security. Can be measured by number of security incidents or by attainment of security compliance goals.

Applications

Project scorecard, based on achievement of project success metrics.

Project backlog. Helpful for management to balance the cost vs. demand for project resources.

Financial

IT Spending as % of Institutional Spending.

IT Spending per College FTE.

Both of these should measure total IT spending, not simply IT departmental spending.

Innovation

Number of Strategic Innovation projects with assigned executive sponsors.

Number of formal processes or structures that support innovation.

Recommendations:

1. Utilize a Service Level Agreement (SLA) to define and track core IS services.
2. Collect and report data about problems and service requests.
3. Regularly report the status of major IT projects.



IT security and controls

LBCC is covered under FERPA and PCI security guidelines due to the nature of its business. **In order to meet these requirements, any organization must set up a strong security management program. The recent break-in at University of California - Berkeley underscores the risks faced by institutions of higher education and the need for this type of approach.**

A few years ago, LBCC developed a document titled "Information Security Plan". A review of this document reveals that it includes many types of information - policies, standards and procedures in a single place. However, it does not adequately cover any of these areas.

Having policies, standards and procedures in a single document is not best practice. A good set of security documents should include at least the following documents:

- Security Policies - a high level set of statements about the stance of the college on information security
- Security Standards - a high level set of technology based standards for how security will be planned and implemented in various technology architectures. e.g. encryption password key length
- Security Procedures - Documents relevant to each major system for how security is to be implemented and managed
- End User Security - A single document that clearly states expectations of users of technology

LBCC should consider formalizing their stance on information security by adopting the ISO 27001 and ISO 27002 set of guidelines. Per these international standards, a strong security program consists of these elements:

- Information Security Policies
- Organization of Information Security
- Human Resource Security
- Asset Management
- Access Control
- Cryptography
- Physical and environmental security
- Operation Security- procedures and responsibilities, protection from malware, backup, logging and monitoring, control of operational software, technical vulnerability management and information systems audit coordination
- Communication security - network security management and Information transfer
- System acquisition, development and maintenance - security requirements of information systems, security in development and support processes and test data
- Supplier relationships - information security in supplier relationships and supplier service delivery management
- Information security incident management - management of information security incidents and improvements



- Information security aspects of business continuity management - information security continuity and redundancies
- Compliance - compliance with legal and contractual requirements and Information security reviews

Currently information security is implemented by the IS team on the basis of best practices for each IT asset. Network security is provided via firewalls at each site. Workstations and servers are locked down via Active Directory controls. Anti-Virus software is used to secure servers, workstations and laptops. Overall this is a reasonable but basic approach to implementing information security.

The current Information Security Plan document is spotty and incomplete. It covers certain areas such as access control policies and password policies but is missing many other areas such as risk management, data classification and handling and cryptography to name a few. In general, policy documents should be created separately from procedure documents as procedures have a tendency to shift with changing technology.

An organization like LBCC needs a more formally organized approach to security management to address security proactively. This means creating a more formal program based on the guidelines of the ISO 27002 standard. The implementation of a security program at any organization should be informed by an understanding of the information assets and the risks they face.

Recommendations:

1. Consider adopting the ISO standards for creating a more formal security program.
2. Perform an inventory of college information assets and define categories of information assets with associated protection policies.
3. Seek outside expertise in developing the security program.



High availability and Disaster Recovery

The use of VMware virtualization technology and the layout of the wide area network with the gigabit link to the Benton center provide a great opportunity to provide high availability and disaster recovery for technology services at LBCC. The IS team is using high quality Dell server equipment that is relatively new. This combination of factors provides built-in reliability in the IT infrastructure.

LBCC is currently working on a disaster recovery plan utilizing data replication between the Albany campus and the Benton center. The high level plan calls for Banner and other key applications to be available via the Benton center in case of a localized disaster at the Albany campus. This is a good first step in creating a minimal plan for providing technology services from an alternate location.

However, the IT team is not currently planning to create a disaster recovery (DR) document describing the environment and the precise steps and actions to be taken in the case of various types of disasters. This not good practice. As part of the planning effort for the DR plan, the team must create a DR document.

The disaster recovery document should include instructional continuity, as well as business continuity plans. This might include the ability to quickly transition to a distance learning delivery model for a short time and consider pedagogical and logistical considerations.

A true IT DR plan should include the following items at minimum:

- Introduction/Purpose
- Scope
- Critical IT resources (result of Business Impact Analysis)
- Disaster scenarios (Threats)
- Risk Analysis Results (External, Internal, Security, Staff)
- Recovery Overview (Recovery time objectives, Recovery process objectives, Alternate site, cold site Vs warm site, high level description)
- Response/Recovery/Restoration Activities (Declaration of disaster, Activities)
- Responsibilities (Coordinator, Management, IT personnel)
- Post recovery activities
- Testing procedures
- Appendices (Detailed system and network diagrams, key personnel contact information, Vendors, Support agreements, checklists, etc.)

To be effective, a DR plan needs to include periodic testing, ideally at six month intervals. This testing should include recovery of key systems as in an actual disaster scenario. Only by doing this level of testing, will LBCC have true confidence in the plan.

Regular backups of the systems located at the Albany campus location are being performed. Data is also copied to the Benton center where backup tapes are produced to be taken off campus for longer term storage. UPS power supplies are available at most locations and in the event of a power outage they hold power for about 15 minutes. This is a good situation from a backup power perspective.



Recommendations:

1. Develop a fully documented disaster recovery plan and have several printed copies available at hand.
2. Perform formal testing of the DR plan at least once a year to practice and test the plan.



IT vendor relationships and support structure

There are a number of vendors who the college is reliant on for licensing and services. The major ones include Ellucian, Oracle, Dell, Ruckus, Comcast, Touchpoint, Moodle Rooms, and Google. In addition, there are other vendors that provide technology and solutions to the IS department and other college departments.

The IS department does a good job of working with vendors to get the best prices and to ensure quality of services. One exception to this is support for the telephone and voice mail system, which has been problematic. The current vendor, Touchpoint, is a reseller and not a large company. It is sometimes difficult to get a consistently high level of support. When contracts are due to be renewed we suggest having a competitive procurement process. This will take more time, but should result in either a more responsive vendor or improved service contracts with the current vendor.

Ellucian and Oracle provide software and database licenses and services for the Banner information systems. Since the college is very reliant on these systems and it would be very difficult and expensive to change vendors, it is sometimes difficult to negotiate improved prices. Whenever the college is considering expanding its licenses to include more products from these vendors, there is an opportunity to renegotiate the existing contracts and/or bundling in several products at attractive prices. **While LBCC is not always in a good position to bargain with these vendors, you should always be looking for creative ways to convince them that the college is a valuable partner.**

Recommendations:

1. Continue to work closely with key strategic vendor partners to leverage your investment and improve services.
2. Look for opportunities to improve contracts with Ellucian and Oracle.
3. When the Touchpoint service contract expires, either find another more responsive vendor or develop a new contract with the current vendor that provides a higher level of service to the college.



Appendix A

LBCC Personnel interviewed

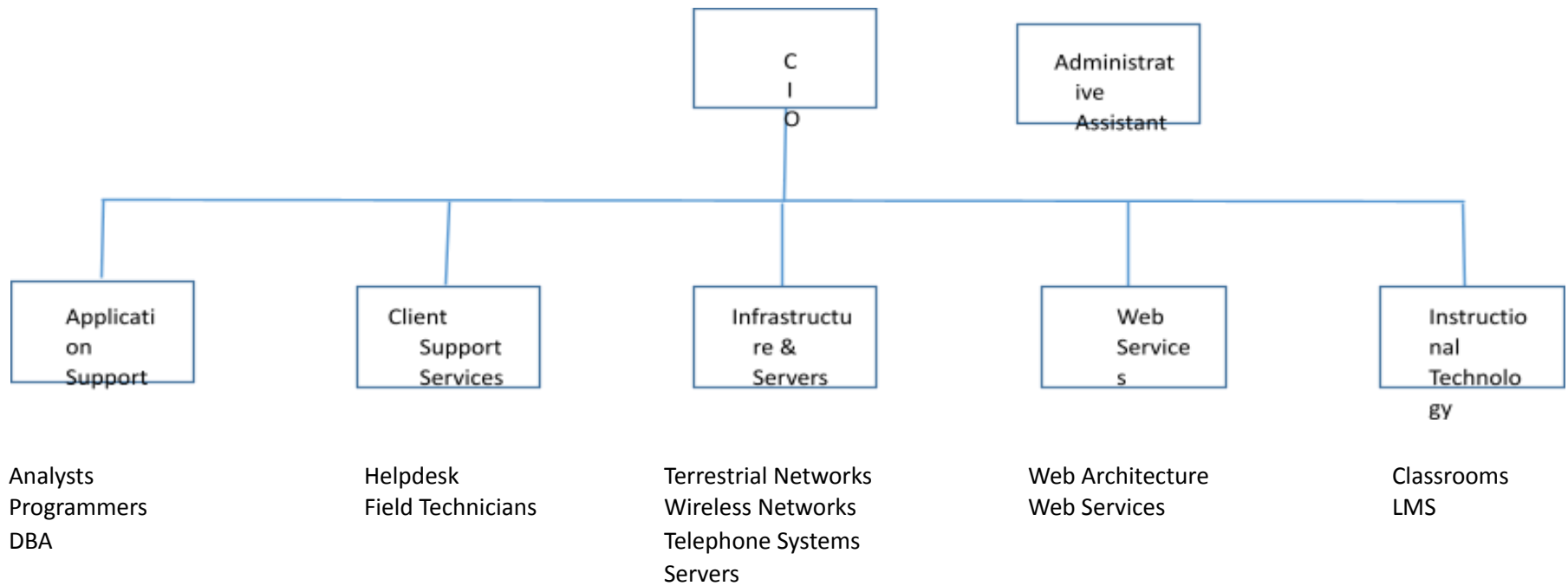
VIE consultants talked with the following people to get information for this report.

Michael Quiner
Dave Henderson
Bruce
Clemensten Ann
Buchele Kathy
Withrow Sandra
LeHoullier Elaine
Robinson Danny
Aynes Gabe
Williams Russ
Rinker
Jonathan Pedersen
Steve Smith
Vern Smith
Jess Jacobs
Dale Stowell
Richard Gibbs
Scott Krambhul
Marcene Olsen
Justin Smith
Richenda Hawkins
Jane Sandberg
Jeff Davis
Jason Kovac
Leslie Hammond
Andrew Feldman
Liz Pearce



Appendix B

Recommended Information Systems Organization





Appendix C

ITIL Overview

The IT Infrastructure Library (ITIL) V3 framework processes are organized into five volumes that provide comprehensive coverage of IT Service Management:

Service Strategy

This volume is the hub of the ITIL v3, and is a view of ITIL which aligns information technology and the business. It helps focus upon understanding, and upon translating business strategy into IT strategy, as well as selection of the best practices for the particular industry in question. The following topics are covered by this volume:

- Strategy and value planning
- Roles / responsibilities
- Planning and implementing service strategies
- Business planning and IT strategy linkage
- Challenges, risks and critical success factors.

Service Design

This volume provides guidance on the creation and maintenance of IT policies and architectures for the design of IT service solutions. This also embraces outsourcing, insourcing and co-sourcing. Included are the following topics:

- The service lifecycle
- Roles and responsibilities
- Service design objectives and elements
- Selecting the appropriate model
- Cost model
- Benefit and risk analysis
- Implementation
- Measurement / control
- CSF's and risks

Service Transition

This volume covers the longer term change management and release practices. It provides guidance for the transition of IT services into the business environment. Fundamentally, it covers how to create a transition strategy from service design and transfer it to the production (business) environment. It includes the following topics:

- Managing change (organizational and cultural)
- Knowledge management
- Risk analysis
- The principles of service transition



- Lifecycle stages



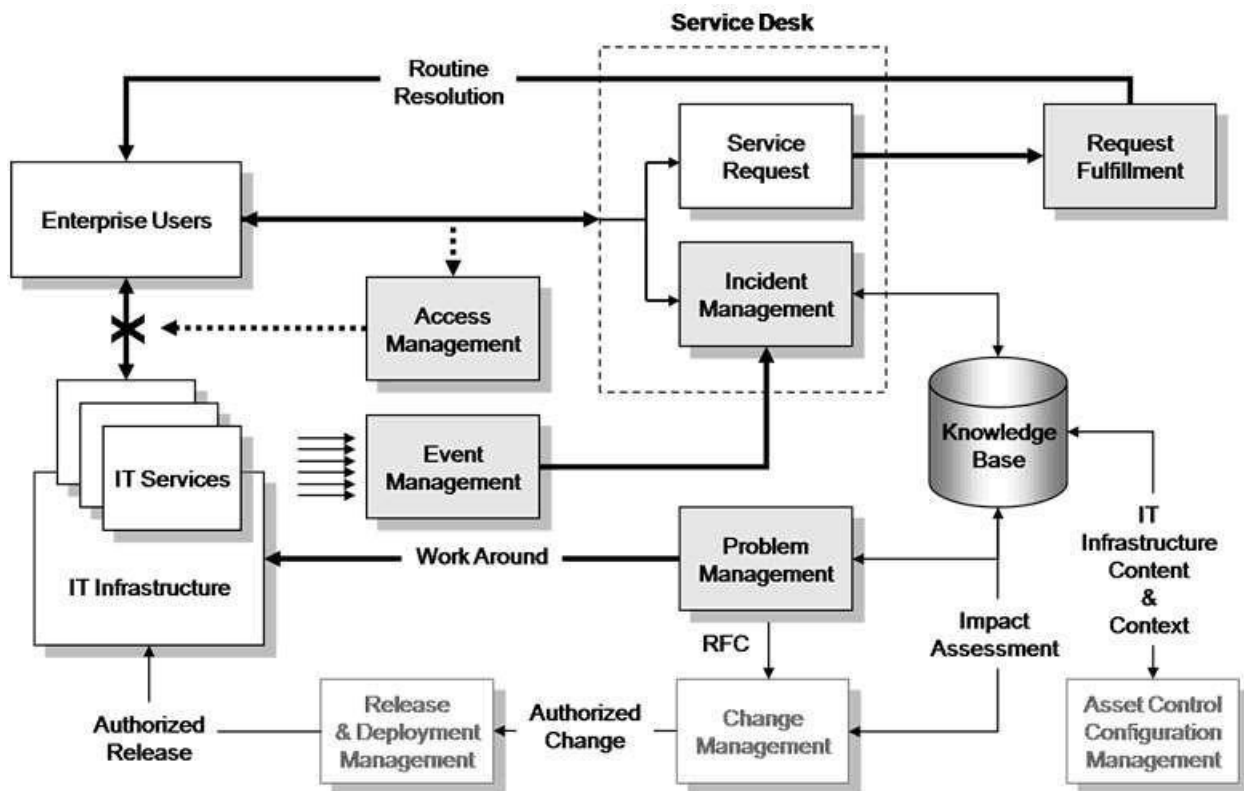
- Methods, practices and tools
- Measurement and control
- Other best practices

Service Operation

This volume covers delivery and control processes with a view to ensuring service stability. It embraces the familiar basics of how to manage services in the production environment, including day to day issues and fire-fighting. The following topics are included:

- Principles and lifecycle stages
- Process fundamentals
- Application management
- Infrastructure management
- Operations management
- Critical Success Factors and risks
- Control processes and functions SAMPLE

SERVICE OPERATION PROCESS MODEL:





Continual Service Improvement

This volume covers the processes involved in improving service management within the business, in addition to the issues related service closure or retirement. It basically describes how to improve a service after it is deployed. It includes the following topics:

- The drivers for improvement
- The principles of CSI
- Roles and responsibilities
- The benefits
- Implementation
- Methods, practices and tools
- Other best practices



Appendix D

Sample Service Level Agreement

Information Technologies

SERVICE LEVEL GUIDELINES

SAMPLE DOCUMENT

PURPOSE:

The information technologies team has created these service level guidelines to enhance reliability and customer satisfaction and to communicate expectations of the services the team is able to provide.

WAYS TO REQUEST ASSISTANCE:

The help desk is staffed between 8 am and 5 pm, Monday through Friday. The help desk is also answered by the computer lab staff from 7 am - 8 am and from 5 -10 pm, Monday through Friday. Customers may request assistance by:

Phone: call 999-999-9999.

E-mail: the e-mail address is: helpdesk@college.edu

Intranet: on a college computer, go to: <http://inside.college.edu> and then choose help desk

Voice mail: call 999-999-9999, then *1264

Fax: fax your request to 999-999-9999

TYPES OF SERVICE PROVIDED:

The following situations describe some of the services provided by information technologies for customer support:

Computer problems – a situation that causes either part or all of the customer’s computer resources to be inoperable. This would include hardware, software, and mainframe or network connectivity failures.

- **Software questions** - a question for assistance to complete a task; for example, a call to ask how to perform a “cut and paste” action.

Account/password questions – to request a new network log-in or e-mail account or to remove



such accounts, or a question for assistance when your password is not accepted.

Purchase requests – this would include the request for upgrades, updates or new computing resources.

Move requests – to request computer-related equipment to be moved or rearranged.



CUSTOMER INFORMATION needed for service requests:

The help desk may ask for some or all of the following information when a service request is placed:

Name, department name, office location and extension

Network login

Detailed description of the problem and what was happening when the problem first occurred

Any error messages displayed, if applicable

RESPONSE LEVELS AND TIME FRAME:

Information Technologies anticipates that customer requests have both a technological impact and a business impact, both to the individual department and to the college. With this in mind, to prioritize the customer requests, four basic response levels have been developed. The customer will determine the response level needed for each service request. Response time refers to the time the specialist/engineer will communicate with the customer, not necessarily when the problem will be resolved. For example, with a down computer, the specialist/engineer will contact the customer within 4 hours after the customer has contacted the help desk. Response time does not guarantee that the computer will be fixed within four hours.

| RESPONSE LEVEL | DESCRIPTION AND EXAMPLES | RESPONSE TIME (WHEN SPECIALIST/ENGINEER WILL COMMUNICATE WITH CUSTOMER) | COMMUNICATION TO CUSTOMER |
|-----------------------|---|--|--|
| Down* | Either part or all of the critical resources are inoperable. | Within 4 business hours after initial customer contact to help desk. A timeline will be provided on when the problem will be resolved. | The specialist/engineer will contact the customer. The help desk will contact the customer after 4 hours from initial contact and complete follow up when fixed. |
| Limited function* | A non-critical resource is inoperable. Example: an office application is unavailable or not able to print. | Within 8 business hours after initial customer contact to help desk. A timeline will be provided on when the problem will be resolved. | The specialist/engineer will contact the customer. The help desk will complete follow up call when fixed. |



| | | | |
|-----------------------|--|--|---|
| Other service request | Other requests that do not need immediate attention. | Within 3 business days after initial customer contact to help desk. A timeline will be | The specialist/engineer will contact the customer. The help desk will complete follow up call when fixed. |
|-----------------------|--|--|---|



| | | | |
|---------|--|--|--|
| | Example: hardware needs to be moved or a minor configuration change is requested. | provided on when the problem will be resolved. | |
| Install | Hardware and/or software need to be added to a customer's computer. Also includes redeployment of computers. | Within 2 weeks after hardware/software has been received** a timeline will be provided on when the problem will be resolved. | Purchasing consultant will contact customer when product is received. After specialist/engineer has verified that product is functional, will contact customer and make arrangements to install. If product is not functional, customer will be contacted and a progress report will be given. |

*If a critical application is non-functioning, the customer may request a down status rather than a limited function status. For example, if enrollment services was processing fall student registrations and access to the mainframe was not available, the business impact is far reaching. Therefore, a down response level would be requested by the customer. Also, if the non-functioning application is critical, the response time may need to be reduced to a shorter time. This need will be negotiated with each individual department and information technologies staff.

PROJECT PURCHASES:

Information Technologies has developed this procedure to purchase computer equipment in large quantities. We recommend these projects be planned for as follows:

In December each department is asked to make their requests for new computer equipment.

This project list will be reconciled with the campus facilities list, the infrastructure list, and finalized and prioritized by the president, vice president of administration, vice president of instruction and information technologies senior manager.

Then purchase orders are generated for the computer equipment to be purchased.

When the computer equipment is received during the summer, the student lab installations are completed first.

After the student lab installations are completed, then the faculty and staff computers are installed. Therefore, depending on when the computers were ordered/received, the two-week timeframe may need to be extended. Information technologies will work with individual departments to install these machines with as little interruption as possible.



All new computers are installed first. All other computers that are to be redeployed are reimaged (note: reimaged is defined as putting the default base image on a computer which includes windows 95, office 97 and GroupWise) and installed after all new computer installations are completed.



Academic installations are priority during the summer installations. Administrative projects are completed during the fall and spring semesters. Other projects are scheduled accordingly. These schedules will be finalized between the department and information technologies.

SUPPORTED HARDWARE/SOFTWARE:

The information technologies team can provide the most comprehensive and timely support when hardware and software configurations are standardized. The Zen works agent desktop management will be utilized to manage the standardization process. Support from information technologies is defined as receiving assistance from all the resources of information technologies. Answers to software questions, training classes or resolution to related hardware problems will be provided to the customer.

Hardware: all standard computer hardware that has been purchased through information technologies will be supported. If purchases are not made through information technologies, the customer or department will be assuming the support for the equipment. We encourage each department to consult with information technologies before purchases are made to avoid any frustration or misunderstandings about what support can be provided. It will not always be possible to provide support to non-standard equipment, but there usually is a standard hardware solution to most computing needs. The reason for this process is to minimize the number of non-standard equipment, which increases response time and decreases service to our customers. See appendix A for a new standard computer configuration.

Computers that are to be redeployed to a new location need be a minimum 166 mhz with 32 megs ram. Anything less than a 166 mhz will not see any significant improvement in performance, and would not be a good use of information technologies resources.

Software: support of software is divided into three sections: supported, network or technical support only, and non-supported software.

Supported: the following software is supported with all the resources of information technologies:

Windows 95

Windows nt 4.0 and above

Groupwise

Netscape 4.08

Internet explorer 4.0 and 5.0

Office 97

Frontpage (currently supporting '97)

Nw lanpro



Mochasoft tn3270 and tn5250

Webct

Grade book

Room scheduling

Trend antivirus

Perception

Network/technical support: software, which accompanies textbooks, as well as curriculum-based software can be installed on a computer but additional support from information technologies is not



available. The faculty and staff are responsible for the operation of the software. For curriculum based software that comes "free" with textbooks, the department will be asked to get documentation on licensing and installation on the network. Contact the help desk to request textbook software to be installed on your computer or server. Before student software is made available in a student lab or classroom, the information technologies staff will test it to ensure the program will run acceptably in our network environment and then will install the software. It is recommended that you give a minimum of one month's notice before students will need to use the program so service can be guaranteed.

Not supported: information technologies does not have the resources to support:

Software that has **not** been purchased through information technologies or where a license has not been issued to install such software on a computer

Screen saver programs

Shareware programs

Customer installed software

When information technologies staff has determined that unsupported software needs to be removed to continue the troubleshooting process, the staff will attempt to obtain permission to remove the unsupported software. If permission is not given, support for the machine cannot be provided without impacting services to other customers.

TRAINING GUIDELINES:

The training program will provide training and documentation on software that is being used campus-wide. Currently the following software is supported through the training program:

Windows 95

Netscape 4.08

Frontpage 97

WebCT

GroupWise

Office 97

Nwlanpro – srs faculty view

Perception

Classes can be scheduled upon request, but we recommend that you place your request by the middle of the preceding month. Contact the trainers by calling the help desk. Trainers are often teaching classes but will make every effort to get back to you before the end of the day. Otherwise, you will be called the next morning. If a problem cannot be solved in an hour's time, you may be asked to attend an open lab or to outsource the problem. Frequent callers with basic questions may be asked to attend training



classes. One-on-one calls are limited. All customers are encouraged to attend open labs for individual problems.

STUDENT LAB GUIDELINES:

The primary goal of the information technologies labs is to provide assistance to students that will enhance their chances of succeeding in technology-based classroom assignments and to provide access to equipment that will support the needs of instruction and life-long learning.



The information technologies labs are spread out on campus and the county sites and support the curriculum of the college and the assignments of the instructors. Students are encouraged to use the facilities with the help and guidance of their instructors.

Full and part-time lab assistants are available to help students during the hours the information technology center is open. Because it is expected that the knowledge and instruction on curriculum based software will be provided by the instructor in the classroom, lab assistants will encourage students who are having difficulties to return to their instructor(s) for additional help. The lab assistants provide these services:

Answer questions about the use of the hardware and operating system, including solving any difficulties that arise with printers, networks, diskettes, or files.

Answer questions about application software, which includes: how to start applications, how to find applications, help with the network software menu software, how to exit applications, how to print from applications, and how to save from applications.

Provide help sheets and reference manuals for the software.

Faculty are to follow the recommended guidelines for the use of technology in the classroom, endorsed by the learning technologies advisory committee, april 1997. See appendix b.

NETWORK MAINTENANCE:

Network resources will be unavailable Monday through Friday, 11 pm – 6 am, and Saturday, 4 pm through Sunday, 4 pm, when backups, upgrades and regular maintenance are being performed.

STATISTICAL REPORTS:

Statistical reports will be posted monthly to the intranet.

SERVICE LEVEL GUIDELINES TIME FRAME:

Service level guidelines will be reviewed and updated on an annual basis with each department.