This listing illustrates the current services provided by the Chancellor’s Office. Although it is extensive, it probably does not include every service currently offered. Further, it does not include governance functions associated with the functioning and support of the State Board of Higher Education or the leadership role of the office with respect to the seven universities. It presupposes a single legal entity (either OUS/OSBHE or a new entity that is not a state agency), in line with both the alternative sets of draft principles being discussed by the Governance and Policy Committee on March 15.

The listing also does not assume that the Shared Services Entity (SSE) is always the only provider or procurer of a given service. On that score, it should be noted that the draft principles presuppose that the Shared Services Entity would provide services whenever two or more universities found that to be advantageous. Obviously, if not all seven were to choose a given service those who did not do so could be alternate providers to the SSE.

The functions proposed for the DPSE are exclusive and not within the province of either the SSE or the universities. Some of the functions of the SSE may prove to be exclusive, also, due either to the mandatory nature of some of the services or the fact that no university chooses to offer them.

In some cases (such as legislative relations and advocacy and international exchange programs), services already are provided both by the Chancellor’s Office and by the individual universities. This listing does not propose to change that except for any items in the category labeled “Shared Services Enterprise—Potential Expanded or New Services.”

The “Destination Unknown” category includes some items that may belong in either or both DPSE and SSE and either or both SSE and campus.

**DEPARTMENT OF POSTSECONDARY EDUCATION**

Community College and University Transfer  
Common Credit Requirements (AP, IB, etc.)  
Approval of High School Courses for College Credit  
Academic Program Approval  
Approval of Institutional Missions  
Distance Education State Authorization  
ATLAS and OSTX  
WICHE/WUE coordination and certification  
WICHE ICE course exchange  
Government to Government Cluster liaison
“Managing student debt initiative”
Veterans Reintegration Efforts
Student record requirements (data element definitions, report requirements/formats/schedule)
Financial records requirements (data element definitions, report requirements/formats/schedule)
College Access Programs (Gear Up, College Access Challenge Grant, etc.)
OPAS
Lego Robotics
Statewide publications (Counselor Handbook, Guide to Becoming a Teacher in Oregon, Reverse Transfer, etc.)

**SHARED SERVICES ENTERPRISE—Currently Shared Services that might continue to be shared by two or more universities**

Affirmative Action Reporting
Reporting regarding policies on diversity, sexual harassment, and consensual relations
MWESB Outreach, Reporting, and Compliance
Sole Source Contract Reporting and Compliance
Transparency Oregon Act Reporting

Internal audit (operational, compliance, financial, information technology, and investigative regarding state, federal and NCAA requirements and higher education enterprise best practices)
Financial records and reporting (including aggregation)
Fifth Site Oversight
Banner FIS software management
Unrelated Business Income Tax filing
Accounting policies and procedures
Monitoring of accounting records
General Accounting
Grant Accounting
General Ledger
Financial Statement preparation
Coordination with state and external audits
Fixed Asset Accounting
Debt coverage calculation and debt policy reporting
Travel rules and rates
Negotiation of finance and administration rates (indirect cost recovery)

Payroll Tax Withholding, deposits and reporting
Payroll Regulatory Reporting (workers comp, Employment Division, COBRA subsidies)
Centralized payments of vendors from payroll deductions
Intellectual Property rules
Legal services (advisory, litigation, contract template preparation, contract review, retention of outside counsel)

Records Management and Archives
Response to Public Records Requests

Systemwide contracts for software licenses, travel card, procurement card, debt collection, hazardous waste, insurance brokers, etc.
Cooperative purchasing agreements

Student records and reporting (to feds, to media, to board, to state)
SCARF
Enrollment forecasting
Applications/Admissions Activity Tracking and Reporting

Space utilization standards
Capital project cost benchmarking
Capital projects retainers for construction-related services
Capital projects contract template development and maintenance
Deferred maintenance, seismic safety, and sustainability planning and tracking

Classified labor relations (bargaining, grievances, etc.)
Classification/compensation for classified staff
Leave policies (vacation, sick leave, etc.)

Retirement benefits administration (PERS, ORP, 403(b), 457, 401(a), etc.)
Health (Medical, Dental, Vision) benefits administration
Other benefits administration

Operating budget preparation/consolidation
Operating budget presentation
Managing budget allocation models (function may go, at least in part, to DPSE)
Managing rule-making for tuition setting
Compliance with legislative tuition guidelines (significant calculation effort required)
Operating budget management (to meet DAS requirements)
Provision of statewide and other data for national surveys
Work with state agencies on state initiatives (e.g., OHA for Medicaid waiver)
Capital planning
Capital budget preparation/consolidation
Capital budget presentation
Investment
Debt management
Maintenance of Tax Exempt Status for Bonds (most issues cover multiple campuses and projects)
Banking Services and Cash Management

Risk Management
Property insurance
Casualty insurance
Specialty insurance
Workers compensation insurance

Legislative Relations/Analysis/Advocacy/Coordination of fiscal impact statements

News and media relations

International exchanges for students and faculty
Study abroad programs

Viewbook Preparation

**SHARED SERVICES ENTERPRISE—Potential Expanded or New Services**

Shared degrees
Shared courses
Shared platform for course delivery

Purchasing linked to accounts payable

Information technology (expansion)

Library materials acquisition and cataloging

Debt collection (including of student loans)

Finance and Administration Cost Proposals for Grants
Research grant accounting
Research grant administration

Library and information services (including materials acquisition and cataloging)
**DESTINATION UNDECIDED**

- Student residency status
- Minimum admissions standards
- Property records
- Academic Innovation Initiatives (currently includes CPL/MOOCs, DQP, reverse transfer, alignment with common core state standards, etc.)
- ETIC
- Linkages to industry/industry affairs
- Academic personnel rules framework (faculty rank, sabbatical and other leave, promotion and tenure process, etc.)