Oregon TECH
Oregon Institute of Technology

Meeting of the
Oregon Tech Board of Trustees
In-Person at Steve & Nancy Sliwa
Executive Board Room, CEET 248
Oregon Tech Klamath Falls Campus
Tuesday, November 3, 2026
9:30 AM – 1:45 PM

Board of Trustees Meeting
AGENDA

Theme: From Strategy to Measurable Progress

1. **Welcome/Call to Order/Roll/Declaration of a Quorum** (9:30 AM) (10 min) *Chair John Davis*
   - **1.1 Meeting Theme Discussion: From Strategy to Measurable Progress**
   - **1.2 Consent Agenda – Review and Approval of Meeting Minutes**
     - **1.2.1 Approval of June 11, 2026 Meeting Minutes**
     - **1.2.2 Approval of July 30, 2026 Special Meeting Minutes**
     - **1.2.3 Approval of August 17-18, 2026 Retreat Minutes**

2. **Public Comments** (9:40 AM) (10 min) *Chair Davis*
   - **2.1 OT-AAUP** *Union President Dr. Kari Lundgren*
   - **2.2 OT-SEIU** *Union President Darryn Stevens*
   - **2.3 Others**

3. **Regular Reports** (9:50 AM) (45 min) *Chair Davis*
   - **3.1 ASOIT – Portland and Klamath Falls** (15 min) *ASOIT Presidents*
   - **3.2 Faculty Senate** (10 min) *Faculty Senate President Dr. Ashton Greer*
   - **3.3 Admin Council** (10 min) *Chair Michelle Meyer*
   - **3.4 Foundation Report** (10 min) *Foundation President Alan Polaski*

4. **Special Reports** (10:35 AM) (30 min)
   - **4.1 Integrating Student-Centered and Human-Centric AI at Oregon Tech** (15 min) *Dr. KC Santosh, Department Chair, CSET & Applied Computing & Geomatics (interim) and Mr. K.S. Venkatraman, Special Advisor to Oregon Tech*
   - **4.2 Healthcare Workforce Partnership: Regional Medical Campus** (15 min) *President Nagi Naganathan*

5. **President's Report** (11:05 AM) (20 min) *President Naganathan*

6. **Budget Report with Focused Discussion** (11:25 AM) (20 min) *Senior Vice President of Finance & Administration John Harman*

11:45 PM – 12:15 PM (30 min) Lunch Break, President's Conference Room, CEET 250
(Optional Headshot Session with photographer Chris Santucci, CEET 247)

7. **Board of Trustees Committee Reports and Discussions** (12:15 PM) (30 min) *Chair Davis*
    - **7.1** **Academic Quality & Student Success Committee Report** (10 min) *AQSS Committee Co-Chairs Cecelia Amuchastegui and Celia Nuñez*
    - **7.2** **Finance, Facilities & Audit Committee Report** (10 min) *FF&A Committee Chair David Cauble*
    - **7.3** **Executive Committee Report** (10 min) *Chair Davis*

8. **Action Items** (12:45 PM) (50 Min) *Chair Davis*
    - **8.1** **Adoption of Amendments to Sections 3.0 and 4.1 of Board Policy on Board Committees** (10 min) *Chair Davis*
    - **8.2** **Approval of Capital Project Submission for Semon Hall Renovation and Expansion** (20 min) *SVP Harman*
    - **8.3** **Approval of 2026-2027 Institutional Goals** (20 min) *President Naganathan*

9. **Discussion Items** (1:35 PM) (5 Min) *Chair Davis*
10. **New/Old Business** (1:40 PM) (5 Min) *Chair Davis*
11. **Adjournment** (1:45 PM) *Chair Davis*

2:00 PM – 3:00 PM (60 min) Ribbon Cutting Ceremony – Kip Thomet Memorial Fieldhouse
(Walk to Fieldhouse from CEET, or golf carts provided)

Social Hour with the university community will continue outside the Kip Thomet Memorial Fieldhouse, immediately following the Ribbon Cutting Ceremony

All times and discussion lengths are estimated and approximate.

The Chair of the Board of Trustees reserves the right to adjust the agenda schedule and the length of agenda items.

1.2.1

Meeting Minutes:
June 11, 2026

Oregon TECH
Board of Trustees

Meeting of the Oregon Tech Board of Trustees
In-person, Steve & Nancy Sliwa Executive Board Room, Klamath Falls Campus
June 11, 2026
9:30 AM – 4:00 PM

Board of Trustees MINUTES

Theme: Lifting Oregon Tech in Times of Headwinds

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Trustees present:
Chair John Davis
Vice Chair Vince Jones
Cecelia Amuchastegui
Stefan Bird
David Cauble
Dr. Vijay Dhir
Dr. Johnnie Early
Kim Faks
Don Gentry
Kanth Gopalpur
Dr. Mark Neupert
Celia Nuñez
Mike Starr
President, Dr. Nagi Naganathan *(Ex-Officio)*

Trustees not present:
Keegan Dentinger
Aaron Hill

University Faculty, Staff, Students, and Visitors in attendance:
Dr. Abdy Afjeh, Senior Vice Provost for Research & Graduate Studies
Carl Agrifoglio, Director, IT Operations & Classroom Technology
Dr. Neslihan Alp, Dean, College of Engineering, Technology and Management
Annie Brooks, SEIU 503 Secretary
Dr. Mandi Clark, Vice President for Student Affairs and Dean of Students
Michael Daenzen, Locksmith
Thom Darrah, Interim Director of Capital Projects
Don DaSaro, Assistant Professor & Chair, Fiscal Operations Advisory Council (FOAC)
Kristin Diggs, Eide Bailly, LLP

Alicia Dillon, Associate Vice President for Finance and Controller
Dr. Dana Director, OHSU Executive Vice Provost
Dr. Hesham El-Rewini, Provost and Senior Vice President for Academic Affairs and Strategic Enrollment Management
Brian Fisher, Trades/Maintenance
Daniel Flash, SEIU 503 Financial Officer
Dr. Ken Fincher, Vice President for University Advancement & Executive Director of Oregon Tech Foundation
Dr. Marybeth GrantBeuttler, DPT Program Director
David Groff, Esq., University General Counsel
Dr. Ashton Greer, Incoming Faculty Senate President
Robert Halstead, OHSU Assistant Vice Provost for Accreditation
Sandi Hanan, Associate Vice President for Human Resources
John Harman, Senior Vice President for Finance and Administration
Katie Harman Ebner, Strategic Communications Advisor (Acting Board Secretary)
Christine Homack, Eide Bailly, LLP
Josie Hudspeth, Assistant Dean of Students, Student Affairs
Suzanne Kunse, Associate Vice President for Government and Community Relations
Professor SuJin Lee, Faculty Presenter
Dr. Kari Lundgren, OT-AAUP President
Dr. Beverly McCreary, Associate Vice President for Faculty Success
Michelle Meyer, Director, Audit and Compliance
Josephine Ness, Executive Director, Recruitment and Retention
Adria Paschal, Senior Executive Assistant, President's Office
Aurora Parsons, ASOIT President, Klamath Falls
Alan Polaski, Oregon Tech Foundation Board President
Dr. Michelle Preston, Associate Dean, College of HAS & DPT Faculty
Jason Roach, Environmental Health and Safety Officer
Jennifer Sherry, SEIU 503 Treasurer
Darryn Stevens, SEIU 503 Local President
Dr. Greg Stringer, Senior Associate Vice President for Strategic Enrollment Management and Student Success
Bryan Wada, Information Technology Specialist
Mackenzie Wilkinson, DPT Student
Dr. Jennifer Wilson, Executive Director, Diversity, Equity, Inclusion & Cultural Engagement
Bryce Wilson, ASOIT President, Portland Metro
Dr. Yuehai Yang, outgoing Faculty Senate President
Dr. Jackie Zhang, Dean, College of Health, Arts and Sciences

1. **Call to Order/Roll/Declaration of a Quorum** *Chair John Davis*
   Chair John Davis called the meeting to order at **9:45 AM**. **Katie Harman Ebner** called the roll of Board members. A quorum was declared.

   Trustee Gentry was invited to open the meeting. He offered a welcome acknowledging the traditional homeland of the Klamath, Modoc, and Yahooskin-Paiute peoples, shared a gathering

song, and offered a ceremonial prayer seeking guidance for the meeting and expressing gratitude for the community gathered.

1.1 Moment of Remembrance for Dr. Kasturi Naganathan

The Board observed a moment of remembrance in honor of Dr. Kasturi Naganathan. Trustee Gentry offered a prayer for President Naganathan and his family, acknowledging his recent loss and extending the support and comfort of the full Board and university community. **President Naganathan** expressed deep gratitude for the overwhelming expressions of sympathy, cards, and messages received from across the Oregon Tech community and beyond.

1.2 Honoring Retiring Board Members: *Chair Davis*

Chair Davis expressed appreciation on behalf of the Board to all trustees for their volunteer service and dedication, including the travel commitments required. He acknowledged trustees continuing their service, those being reappointed, and recognized outgoing at-large trustees Vice Chair Vince Jones and Trustee Mike Starr.

Vice Chair Vince Jones reflected on his ten years of service on the Board, including his involvement in the selection of President Naganathan and his own service as interim chair. He expressed gratitude to fellow trustees, to the Finance and Administration team including Sr. VP John Harman, AVP Alicia Dillon, and Director Michelle Meyer, and shared personal sentiments of friendship and gratitude. The Division of Finance and Administration presented Trustee Jones with a token of appreciation, inscribed to commemorate his legacy and his retirement in June 2026.

Trustee Mike Starr reflected on his tenure, expressed gratitude for his service, and emphasized the importance of Oregon Tech maintaining its core values while embracing change and institutional momentum.

A drum honor song was performed by Trustee Gentry in tribute.

President Naganathan praised the vision and the leadership of the outgoing at-large trustees, noting their support for significant institutional initiatives including OMIC R&D. Chair Davis and President Naganathan expressed gratitude on behalf of the university community and presented both outgoing trustees with a gift of appreciation.

Chair Davis then gave special recognition to outgoing student trustees **Aaron Hill** and **Keegan Dentinger**, both of whom are graduating. Trustee Dentinger had conveyed his gratitude for the opportunity to serve; he was unable to attend due to his commitments as he is graduating from OHSU with a nursing degree.

1.3 Consent Agenda *Chair Davis*

1.3.1 Approval of April 8, 2026 Meeting Minutes

Chair Davis introduced the item. No comments or revisions were offered. A voice vote was conducted. The minutes were **approved** unanimously with no opposition noted.

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2. **Public Comments** *Chair Davis*
   OT-AAUP President **Dr. Kari Lundgren** reported on union officer elections and continued labor-management collaboration. **OT-SEIU President Darryn Stevens** spoke to classified staff's contributions and the need for continued engagement with leadership.

3. **Regular Reports** *Chair Davis*
   Shared governance updates:

   ASOIT Presidents Aurora Atwood and Bryce Wilson cited a new 47-page student handbook, a fee-transparency initiative, and incoming KF president Nate Strauch, plus growing Portland Metro engagement and the new campus gym; Faculty Senate's **Dr. Yuehai Yang** and incoming president **Dr. Ashton Greer** cited improving enrollment and retention and priorities including streamlined curriculum approval and revised evaluations; the **Carl Agrifolgio,** Chair of the Admin Council, noted a new Owl-Star Partner Award, an emeritus policy, and a summer flexible-hours trial.

   Foundation Board President Alan Polaski and **VP Ken Fincher** reported a record fundraising year: Give a Hoot Day raised over $500,000; annual giving hit $5.6 million (102% of goal); the capital campaign is about 35% complete; scholarships doubled to roughly $1.1 million; the endowment grew from $25 million to $50 million; and campus branding, signage, and OMIC R&D co-branding advanced alongside these results.

   Provost El-Rewini introduced new HAS Dean **Dr. Jackie Zhang** and reported strong progress on the university's ten goals: the Strategic Plan is complete; applications are up 31%; grants are trending toward 88% of goal; and AI competencies reached 60 courses against a goal of 10, alongside a new BS in AI. **President Naganathan** noted ongoing OHSU medical-education coordination, with no board action required yet.

   Sr. VP John Harman presented year-end finances: a roughly $642,000 operating deficit (less than 0.7% of budget, reflecting planned investment, not structural erosion); reserves at $14.7 million (19% of revenue, above the Board's threshold); remissions reaching about 90% of first-year and 51% of all students, now under external review; and investment returns beating benchmarks.

   VP Mandi Clark reported strong athletics results, including softball's fifth straight conference title and an All-American track honor. She also reported that the new Residence Hall will open for occupancy at the end of the month.

   AVP Suzanne Kunse reported three federal appropriations projects advancing (the gamma camera, BS in AI, and the UAS/OMIC pipeline) and Semon Hall's rise from 9th to 4th in state capital rankings.

   Provost El-Rewini outlined the team implementing the 2027-2030 Strategic Plan, *Oregon Tech Forward*, with further discussion planned at the retreat.

4. **Special Reports** *Chair Davis*
   DPT student **Mackenzie Wilkinson**, **Dr. Michelle Preston**, **Dr. Marybeth GrantBeuttler**, and OSHU Executive Vice Provost **Dr. Dana Director** presented an update on the Doctor of Physical Therapy program, Oregon Tech's first doctoral degree (with OHSU): initial CAPTE accreditation is in place, a new cohort launches each June with five reserved Oregon Tech seats, and the program is distinguished by its rural-health focus and emotional-intelligence emphasis. Trustees discussed a more formal pre-DPT pipeline.

5. **Board of Trustees Committee Reports** *Chair Davis, Trustee Amuchastegui, Trustee Nuñez, Vice Chair Jones*
   The AQSS and FF&A Committees reviewed and forwarded the Geomatics option, FY2026–27 Budget, and Debt Management Policy reflected in the Action Items below; Trustee Cauble was recognized as incoming FF&A chair. The Executive Committee (Davis) separately recommended four at-large trustee nominees to the Governor and voted to confer an honorary doctorate on Dr. Shereef Elnahal and authorize contract-extension talks with President Naganathan.

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6. Action Items *Chair Davis*

6.1 **Approval of FY 2026-27 All Funds Budget** *Sr. VP Harman*

Sr. VP Harman presented the proposed FY2026–27 All Funds Budget. Key elements included:

- Budget planning began in January and incorporated state funding updates, a 4% tuition increase, a 1% increase in projected student credit hours, and a compensation pool allocation for SEIU members.
- Approximately 46.5% of the budget is funded by tuition and fees; state appropriations provide approximately 51% through the Public University Support Fund, with Oregon Tech historically receiving approximately 7% of that fund.
- Approximately 77% of the budget is allocated to salaries and benefits, consistent with prior years.
- Importantly, the budget submitted is structurally balanced and does not request use of reserve funds. The submitted plan also does not include any major capital improvements or bonded capital projects.
- Strategic investments included in the budget are largely one-time costs, with plans to transition them into departmental budgets over time.
- Trustees discussed remissions forecasting, enrollment assumptions, and the need for more rigorous budget controls around scholarship remissions in future cycles.

Action: A motion was made by **Trustee Jones** to approve the FY2026–27 All Funds Budget. The motion was seconded by **Trustee Amuchastegui**. A roll call vote was conducted. **The motion carried unanimously**.

6.2 **Approval of Revised Board Policy on Debt Management** *Sr. VP Harman*

Sr. VP Harman presented proposed revisions to the Board's debt management policy. Key elements included:

- Outstanding bond principal stands at approximately $60.8 million, with annual debt service of approximately $5.3 million, including approximately $2.1 million for the new student housing project.
- The existing policy limits annual capital borrowing to 7% of total annual expenses. Current capital debt spending is approximately 5.9% under the revised definition.
- GASB changes adopted in 2017 require all leases to be capitalized on the balance sheet, which creates the potential for operating lease obligations to push the university's reported ratio toward or above the 7% policy threshold.
- The proposed revision excludes operating leases and certain software agreements from the internal 7% debt limit calculation while maintaining full GASB-compliant external reporting of lease obligations.

Action: A motion was made by **Trustee Jones** to approve the revised Board Policy on Debt Management as presented. The motion was seconded by **Trustee Starr**. A roll call vote was conducted. Ayes: Davis, Jones, Amuchastegui, Bird, Cauble, Dhir, Early, Faks, Gentry, Gopalpur, Neupert, Nuñez, Starr. Nays: none. **The motion carried unanimously**.

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6.3 **New Option within BS in Geomatics: Unmanned Systems** *Professor SuJin Lee; Provost El-Rewini*

Professor SuJin Lee presented the proposal for a new Unmanned Systems option within the Bachelor of Science in Geomatics program. Key elements included:

- **Market Need:** The option addresses a significant gap in unmanned aerial systems (UAS) education on the West Coast, with no comparable four-year programs in Oregon or neighboring states. The UAS market is projected at $30 billion over the next decade.
- **Curriculum:** The program integrates design, construction, operation, and data analysis of unmanned systems with geospatial engineering. Students are required to obtain an FAA remote pilot license by the end of the first year.
- **Pathways:** The program offers a four-year track and a 2+2 transfer pathway from community college partners, with MOUs in development and Major Transfer Maps being created.
- **Partnerships:** Collaborations are planned with OMIC, Kingsley Field, and industry partners. Internship and project opportunities are being developed.
- **Financial Projections:** Enrollment is projected to grow from 11 to 31 students over five years. Two additional faculty positions are planned. Initial lab and course costs are estimated at $30,000–$42,000 annually, with a positive net income projected by year five.
- **Launch:** Target launch is Fall 2027, effective Summer 2026 authorization.

Trustees expressed strong support for the program's well-developed budget and curriculum and its unique positioning in the regional market.

Action: A motion was made by **Chair Davis** to approve the new Unmanned Systems option within the Bachelor of Science in Geomatics program, effective Summer 2026, and to authorize the President or designee to follow up with relevant accreditation and state bodies. The motion was seconded by **Trustee Starr**. A roll call vote was conducted. Ayes: Davis, Jones, Amuchastegui, Bird, Cauble, Dhir, Early, Faks, Gentry, Gopalpur, Neupert, Nuñez, Starr. Nays: none. **The motion carried unanimously.**

7. Discussion Items *Chair Davis*

No formal items were brought; commencement logistics, retreat planning, and required ethics training were noted.

8. New/Old Business *Chair Davis*

Trustee Neupert raised the need to review and update the university's peer comparator list, which was last established in July 2021. The discussion noted that Oregon Tech's new doctoral program and updated Carnegie classification warrant a reassessment. It was acknowledged that an update will require meaningful effort given current staffing constraints in the institutional research function.

Action: A motion was made by **Trustee Neupert** to direct the Provost to initiate a process for reviewing and updating the university's peer comparator list, with shared governance and faculty involvement, and to report back to the Board on the proposed process. The motion was seconded by **Chair Davis** with a friendly amendment to include reporting at the upcoming

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retreat. A roll call vote was conducted. Ayes: Davis, Jones, Amuchastegui, Bird, Cauble, Dhir, Early, Faks, Gentry, Gopalpur, Neupert, Nuñez, Starr. Nays: none. **The motion carried unanimously**.

9. **Adjournment at 4:50 PM.**
   The meeting was adjourned, with an invitation to tour the new Residence Hall.

A recording of the meeting is available on the Oregon Tech website:
https://www.oit.edu/trustees/meetings-events/recordings

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1.2.2

Special Meeting Minutes:

July 30, 2026

Special Meeting of the Oregon Tech Board of Trustees
MINUTES

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Trustees present:
Chair John Davis
Cecelia Amuchastegui
Stefan Bird
David Cauble
Cruz Collin
Dr. Vijay Dhir
Dr. Johnnie Early
Dr. Arnel Fajardo
Kim Faks
Don Gentry
Christine Mangan
Dr. Mark Neupert
Celia Núñez
President, Dr. Nagi Naganathan *(Ex-Officio)*

Trustees not present:
Kanth Gopalpur

University Faculty, Staff, Students, and Visitors in attendance:
Diana Angeli, Executive Assistant, Office of the President
Dr. Mandi Clark, Vice President for Student Affairs and Dean of Students
Dr. Hesham El-Rewini, Provost and Senior Vice President for Academic Affairs and Strategic Enrollment Management
Dr. Ken Fincher, Vice President for University Advancement & Executive Director of Oregon Tech Foundation
David Groff, Esq., University General Counsel
John Harman, Senior Vice President for Finance and Administration
Katie Harman Ebner, Strategic Communications Advisor (Acting Board Secretary)
Adria Paschal, Senior Executive Assistant, President's Office
Bryan Wada, Information Technology Specialist

1. **Call to Order/Roll/Declaration of a Quorum** *Chair John Davis*
   Chair John Davis called the meeting to order at **3:02 PM** and welcomed new trustees Cruz Collin, Dr. Arnel Fajardo, and Christine Mangan. **Katie Harman Ebner** called the roll of Board members. **A quorum was declared.**

2. **Consent Agenda** *Chair Davis*
   2.1 Approval of the Minutes of the June 11, 2026 Board Meeting
   Trustee Neupert raised a point of order, regarding the text of the motion for the friendly amendment under New Business at the June 11 meeting. **Chair Davis** directed Acting Board Secretary Harman Ebner to redraft the relevant section and return the revised minutes for readoption. **Approval of the June 11 minutes was deferred.**

3. **FY26 Year-End Financial Forecast Update** *Sr. VP for Finance and Administration John Harman*
   Sr. VP John Harman reported that Oregon Tech will conclude FY2026 with a positive balance of approximately $17,000, improved from the $640,000 deficit projected in June. The improvement was achieved through year-end reconciliations, accruals, and a transfer of approximately 5.5% of quasi-endowment earnings. Significant investments were made in faculty and adjunct compensation during the year. Labor costs ran approximately $421,000 over budget, offset by administrative salary savings; non-labor expenses were unchanged.

   Trustee Faks asked about unfilled administrative positions; **SVP Harman** committed to report the number by the following day. **Trustee Neupert** requested a future report on indirect cost recovery revenues and their allocation, to be provided at the August retreat. **President Naganathan** and **Chair Davis** recognized the Finance and Administration team for their work.

4. **Leadership Items** *Chair Davis*
   4.1 Action Item – Selection of Board Officers: Chair and Vice Chair
   Chair Davis nominated **Trustee Cecelia Amuchastegui** for Vice Chair, citing her campus engagement, community ties, and leadership as AQSS Co-Chair. Trustees Nuñez and Neupert provided support.

   Action: A motion was made by **Chair Davis** to elect **Trustee Cecelia Amuchastegui** as Vice Chair of the Board of Trustees. The motion was seconded by **Trustee Neupert**. A roll call vote was conducted. Ayes: Davis, Amuchastegui, Bird, Cauble, Collin, Dhir, Early, Fajardo, Faks, Gentry, Mangan, Neupert, Núñez. Nays: none. **The motion carried unanimously.**

   Trustee Neupert nominated **Chair Davis** to continue as Chair, with broad trustee support expressed.

   Action: A motion was made by **Trustee Neupert** to re-elect **Trustee John Davis** as Chair of the Board of Trustees. The motion was seconded by **Trustee Gentry**. A roll call vote was conducted. Ayes: Davis, Amuchastegui, Bird, Cauble, Collin, Dhir, Early, Fajardo, Faks, Gentry, Mangan, Neupert, Núñez. Nays: none. **The motion carried unanimously.**

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4.2 Presidential Evaluation

Chair Davis noted that before presenting the evaluation summary, **Trustee Neupert** raised a point of order if the full Board has received a report on annual Presidential Evaluations. **Chair Davis** responded that written evaluation reports had been prepared by the Chair and Vice Chair and submitted to the Board each year in conjunction with the adoption of annual Board goals, consistent with Board policy.

Chair Davis then presented an executive summary of the comprehensive presidential evaluation commissioned through an independent higher education consulting firm. The evaluation included confidential interviews with approximately 25 stakeholders, including trustees, university leadership, faculty, students, community members, and state-level partners. **Vice Chair Amuchastegui** participated in the evaluation process alongside the outgoing Vice Chair.

Key strengths identified in the evaluation included:

- Strong strategic leadership, consistent institutional direction, and disciplined executive leadership.
- Highly positive external credibility, including relationships with the legislature, state officials, HECC, donors, industry leaders, and community partners.
- Effective governance and proactive communication with Board leadership, characterized by high information flow and a low-surprise operating environment.
- Advancement of major institutional initiatives, capital investments, and a strong senior leadership team.
- Continued enrollment growth, expanded academic programs, record fundraising, increased grant expenditures, and a balanced budget.
- Recognition among peer presidents and strong standing within the statewide higher education community.

Areas identified for continued development included:

- Improving visibility and communication with faculty, staff, and student stakeholders.
- Strengthening comprehensive operational execution, including clear responsibilities, timelines, decision rights, and accountability structures.
- Managing the pace and ambition of the strategic agenda in alignment with institutional capacity.

Executive Session

The Board recessed into Executive Session pursuant to ORS 192.660(2)(i) to review and evaluate the employment-related performance of the chief executive officer, and pursuant to ORS 192.660(2)(f) and ORS 40.225 Rule 503 to consider information or records exempt by law from public inspection, including attorney-client privileged communication. No action was taken during the Executive Session.

Upon returning to open session, the Board proceeded to item 4.3.

4.3 Action Item – Contract Extension: University President *Chair Davis*

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Chair Davis presented a recommendation to extend President Naganathan's employment agreement through June 30, 2030. He provided the following context:

- **Contract History:** President Naganathan's contract commenced in March 2017 and has been extended twice, most recently in December 2022. The current contract runs through June 30, 2027 and required the Board to communicate its intentions regarding reappointment by June 30, 2026. The Executive Committee authorized the Chair and Vice Chair to begin contract negotiations at its June 11, 2026 meeting.
- **Rationale for Extension:** A three-year extension was recommended to align with the Oregon Tech Forward 2027–2030 Strategic Plan, to provide continuity during the public launch of the comprehensive capital campaign (currently $10 million toward a $35 million goal), to support the ongoing medical school initiative, and to preserve the stability and momentum of the current senior executive team.
- **Compensation Context:** President Naganathan's base salary and total compensation currently fall between the 25th and 50th percentile of the primary reference group of 13 comparable public universities. The Chair and Vice Chair conducted analysis and negotiations informed by peer benchmarking. The proposed compensation package includes base salary increase; increases to vehicle and housing allowances, which offset the absence of a presidential residence and vehicle; a multi-campus stipend; a supplemental retirement reimbursement; and a health and wellness stipend. The Oregon Tech Foundation Executive Committee authorized a foundation salary supplement and a one-time retention bonus.

Trustees discussed the rationale for a three-year rather than a longer extension, the total compensation figure, and the treatment of vehicle-related expenses. **Chair Davis** noted that the proposed package is estimated to position the President approximately above the 60th percentile of the primary reference group, which the Board considered appropriate given his tenure and the institution's complexity as a multi-campus polytechnic. **Vice Chair Amuchastegui** affirmed the process and the fairness of the proposed terms.

Action: A motion was made by **Vice Chair Amuchastegui** to approve the contract recommendation and authorize the Chair and Vice Chair, with assistance from University General Counsel, to negotiate and execute an amendment to the President's employment agreement consistent with the terms approved by the Board. The motion was seconded by **Trustee Early**. A roll call vote was conducted. Ayes: Davis, Amuchastegui, Bird, Cauble, Collin, Dhir, Early, Fajardo, Faks, Gentry, Mangan, Núñez. Abstain: Neupert. Nays: none. The motion carried.

President Naganathan thanked the Board for its confidence and support. He appreciated the feedback and noted that the executive leadership team had already begun planning for strategic plan implementation with broad stakeholder engagement. He reaffirmed his commitment to advancing Oregon Tech's mission and expressed gratitude to the Board.

5. **New Business/Other Business** *Chair Davis*
   Chair Davis encouraged trustees to submit topics for the August Board retreat. Planned elements include a board policy orientation, distribution of an updated board book with bylaws and board policies and advance preparation materials to support deeper strategic discussion.

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Trustees were asked to complete any pre-reading distributed in advance so the retreat can be used for substantive working sessions.

6. **Adjournment at 4:41 PM**
   There being no further business, the meeting was adjourned by Chair Davis.

A recording of the meeting will be available on the Oregon Tech website:
https://www.oit.edu/trustees/meetings-events/recordings

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1.2.3

Retreat Minutes:

August 17-18, 2026

Oregon TECH
Board of Trustees

Oregon Tech Board of Trustees Retreat
In person, Juniper Preserve, Bend, OR
Monday, August 17, 2026
3:00 PM – 8:00 PM
Tuesday, August 18, 2026
8:00 AM – 8:00 PM

Board of Trustees Retreat
MINUTES

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DAY 1 – MONDAY, AUGUST 17, 2026

Trustees present:
Chair John Davis
Vice Chair Cecelia Amuchastegui
David Cauble
Dr. Vijay Dhir
Dr. Johnnie Early
Dr. Arnel Fajardo
Kim Faks
Kanth Gopalpur
Christine Mangan
Dr. Mark Neupert
Celia Núñez
President, Dr. Nagi Naganathan *(Ex-Officio)*

Trustees not present:
Stefan Bird
Cruz Collin
Don Gentry

University Staff and Visitors in attendance:
Diana Angeli, Executive Assistant, President's Office
Ben Cannon, Executive Director of HECC
Dr. Mandi Clark, Vice President for Student Affairs
Dr. Shereef Elnahal, President of OHSU
Dr. Hesham El-Rewini, Provost and Senior Vice President for Academic Affairs and Strategic Enrollment Management
Dr. Ken Fincher, Vice President for University Advancement & Executive Director of Oregon Tech Foundation
David Groff, Esq., Vice President & University General Counsel
John Harman, Senior Vice President for Finance and Administration
Katie Harman Ebner, Strategic Communications Advisor & Board Secretary

Vince Jones, Former Trustee ("Golden Trustee")
Gaylyn Maurer, Executive Director of University Health and Wellness
Adria Paschal, Senior Executive Assistant, President's Office

1. **Call to Order & Welcome** *Chair John Davis*
   Chair John Davis called the meeting to order at **3:24 PM**. Opening remarks acknowledged the impact of recent wildfires on communities in central and eastern Oregon, including Trustee Gentry's family. Trustees and members of the Senior Leadership Team introduced themselves. Dr. Ken Fincher and David Groff were recognized for their service as former Board Secretaries.

2. **Board Primer / Review Board of Trustees Handbook** *Chair John Davis*
   Chair Davis reviewed retreat expectations and presented the Board's Roles and Responsibilities, including the Board's statutory authority (ORS 352.025), the Policy on Delegation of Authority, fiduciary duties, and shared governance. Discussion points:
   - **Former Trustee Vince Jones** spoke to the role of a Trustee and the value of active involvement and contribution.
   - **Vice Chair Amuchastegui** and Trustee Núñez commented on the respective roles of trustees and the Senior Leadership and encouraged reaching out to fellow trustees.
   - **Trustee Dhir** asked about the makeup and composition of the Board.
   - **Trustee Neupert** asked how the Board can create value to strengthen the University.

3. **Executive Session**
   The Board met in executive session under ORS 192.660(2)(f) and ORS 40.225 Rule 503 and reconvened in open session at **5:05 PM**.

4. **Medical School Dialogue, Part 1** *Dr. Nathan Selden*
   Dr. Nathan Selden, Dean of the OHSU School of Medicine, outlined challenges in U.S. medical education: training is too long and too expensive, and rural and frontier areas are underrepresented. He described a "faster, better, cheaper" yet a high-value model built on coordinated pathways and an education ecosystem. He proposed an Oregon Tech–OHSU partnership aligned around a regional campus model, noting it would be efficient to stand up and that OHSU's 2028 accreditation cycle is the right time to build the relationship.

   President Naganathan commented on six-year programs, the viability of a regional medical campus, and engaging local high school students, framing the question as what problem the partnership aims to solve.

DAY 2 – TUESDAY, AUGUST 18, 2026

1. **Call to Order** *Chair John Davis*
   Chair John Davis called the meeting to order at **8:18 AM**.

2. **Working Breakfast – Financial & Enrollment Foundation** *Provost Hesham El-Rewini and SVP John Harman*
   Provost El-Rewini reviewed national and regional enrollment trends, including shrinking high school cohorts, increased competition, and opportunities with adult learners, transfer students,

online programs, and new markets such as the Rogue Community College partnership in Medford. **SVP Harman** reported that FY 2025–26 Education and General Funds ended with a $101,000 operating surplus without use of reserves, and the general fund balance rose to about $15.5 million (19.8% of budgeted operating revenues, above the 10–15% policy range). A follow-up was requested on data for working professionals seeking adult learning and certification.

3. **Medical School Dialogue, Part 2** *Dr. Shereef Elnahal*
   OHSU President Dr. Shereef Elnahal described why a partnership could work: high demand for medical education, too few physicians for patient need, and Oregon Tech's leadership, facilities, and statewide role in AI. He noted Oregon Tech is positioned to train AI-proficient physicians. In response to President Naganathan, Dr. Elnahal said OHSU has found the concept of partnering with Oregon Tech feasible and will now build a roadmap: capitalize and engage philanthropy, align timing with the 2028 accreditation, plan facilities for clinical rotations, and advocate to the Legislature and Governor for capital needs and GME funding.

   President Naganathan said a separate feasibility study may not be needed if we partner with OHSU and create a regional medical campus. This is also in line with the State's desire for more collaboration. We will seek our Board's formal endorsement at the appropriate time.

   Discussion noted a series of communication strategies to announce the partnership ahead of donor outreach and a fundraising need of $50–100 million at a minimum.

4. **State of Higher Education in Oregon and the Northwest**
   HECC Executive Director Ben Cannon briefed the Board on HB 4124 (2026), which directs HECC and consultants to study institutional partnerships and long-term sustainability, with recommendations due to the Legislature in April 2027. An advisory group guides the study, and consultants are meeting with institutional leaders. Preliminary findings point to a need for more postsecondary capacity to meet workforce demand. Recommendations will likely be staged over several years, many will not require legislation, and the October 1 preliminary report will offer suggested actions rather than final recommendations.

5. **President's Report and Introduction to the Strategic Plan** *President Nagi Naganathan*
   President Naganathan reported on the ten 2025–26 Institutional Goals: four met, three substantially on track, and three in progress. Enrollment and retention results will be measured at Fall 2026 census. He proposed 2026–27 Institutional Goals for consideration at the Fall Board meeting, including: 1% growth in new students; a 2% increase in new-undergraduate retention and a joint fund-raising goal with the Oregon Tech Foundation..

6. **Implementation of the New Strategic Plan** *Provost and SVP Hesham El-Rewini, SVP John Harman, VP Mandi Clark & VP Ken Fincher*
   Senior leadership presented Oregon Tech Forward 2027–2030 Strategic Plan implementation: the President as principal goal owner, senior leadership executive sponsors, specified goal owners, and project managers, with progress reported to the Board. Provost El-Rewini presented Goal 1 (Enrollment).

DRAFT

7. **Executive Session**
   The Board met in executive session under ORS 192.660(2)(f) and ORS 40.225 Rule 503 and reconvened in open session at **1:40 PM**.

8. **Strategic Plan Implementation (continued) and Board Discussion** *Provost and SVP Hesham El-Rewini, SVP John Harman, VP Mandi Clark & VP Ken Fincher*
   Dr. Clark presented Goal 2 (Retention and Graduation); SVP Harman – Goals 5 (High-Performance Computing), 8 (Premier Place to Work), and 9 (Facilities); Dr. Fincher – Goals 7 (Workforce Partnerships) and 10 (Brand). Goals 3, 4, and 6 (Provost El-Rewini) were deferred for time, allowing the Trustees to express their reflections about the retreat. Trustees expressed pride in the plan and growing excitement about the medical school partnership (Núñez, Mangan, Cauble, Jones); stressed implementation, metrics, and stakeholder ownership of a living plan (Núñez, Amuchastegui, Dhir); urged planning for the demographic cliff and asked when a joint medical school announcement can be expected (Fajardo); named key challenges: a shrinking student pool, cost of education, and AI-driven program changes (Dhir); noted the need to balance growth strategies with risk (Neupert), attention to Allied Health capacity (Faks), and that "people carry the brand" (Early).

9. **Peer Comparator Review Process** *Provost and SVP Hesham El-Rewini*
   Provost El-Rewini presented a process to develop peer and aspirational institution lists using IPEDS data, for use in strategic planning, accreditation and Board reporting, and salary and tuition benchmarking. A joint six-member faculty–administrator committee will recommend variables and two final lists of 10 institutions each; the Provost makes the final decision.

10. **Meeting Calendar for 2026–27**
    The proposed calendar was reviewed. The Board Secretary will send a survey for trustees to confirm availability.

11. **New Business**
    Chair Davis read a public comment from Dr. Kari Lundgren about a caring university. Trustees were encouraged to read The Caring University by Kevin McClure.

12. **Day 2 and Retreat Adjournment at 4:25 PM** *Chair John Davis*

DRAFT

3.1
ASOIT Reports

BOARD OF TRUSTEES MEETING

We are ASOIT

Your student government at Oregon Institute of Technology











Hello!

ADMINISTRATIVE OFFICER

HOMETOWN

Milwaukie, Oregon

Near Portland

MAJOR

Professional Writing & Communications

YEAR

Junior

Third year at Oregon Tech

WHY I JOINED ASOIT

“I’m excited to be a part of ASOIT so that I can gain experience in making a difference. The opportunity to improve students’ experience and well-being is one I do not take lightly.”



Sara Cowart

VICE PRESIDENT

HOMETOWN

Laytonville, California

30+ years in Crescent City & Brookings

MAJOR

Applied Psychology

YEAR

Senior

WHY I JOINED ASOIT

“I care about the climate of the university, and I very much want to be a part of creating positive change for students at Oregon Tech.”

- **President**, Rainbow Owls Club
- **Officer**, Psychology Club
- **Psi Chi**, International Honor Society in Psychology
- **Former roofer** and remodeling business owner



AJ Borovansky

FINANCE OFFICER

HOMETOWN

Medford, Oregon

MAJOR

Biology – Health Sciences

YEAR

Junior

WHY I JOINED ASOIT

“I joined ASOIT because I wanted to have more of a voice for students on campus. I am a very active student in many different areas, and I will strive to make real changes that benefit the student body.”

Academic All-American, Rugby

President, Phi Delta Theta

Former Lead Student Ambassador, Admissions

Loves working out, reading, friends & family, and a good debate



Isaiah Payne

ASOIT PRESIDENT

HOMETOWN

Medford, Oregon

MAJOR

Construction Management

WHY I JOINED ASOIT

“I want to use my skills and leadership to make a positive impact on students.”

My goal: be a bridge between students and faculty by

- Promoting transparency
- Advocating for student concerns
- Making sure every student’s voice is heard

- **President**, Culinary Arts Club
- **Treasurer**, Social Bowling Club
- **Involved** in ASC
- **Passionate** about leadership and teamwork

Oregon TECH

ASOIT

ASOIT-PM

Board of Trustees Report

November 2026

26-27 Officer Team



President

Jonah Lee



Vice President

Khadijah Wright

Admin Officer

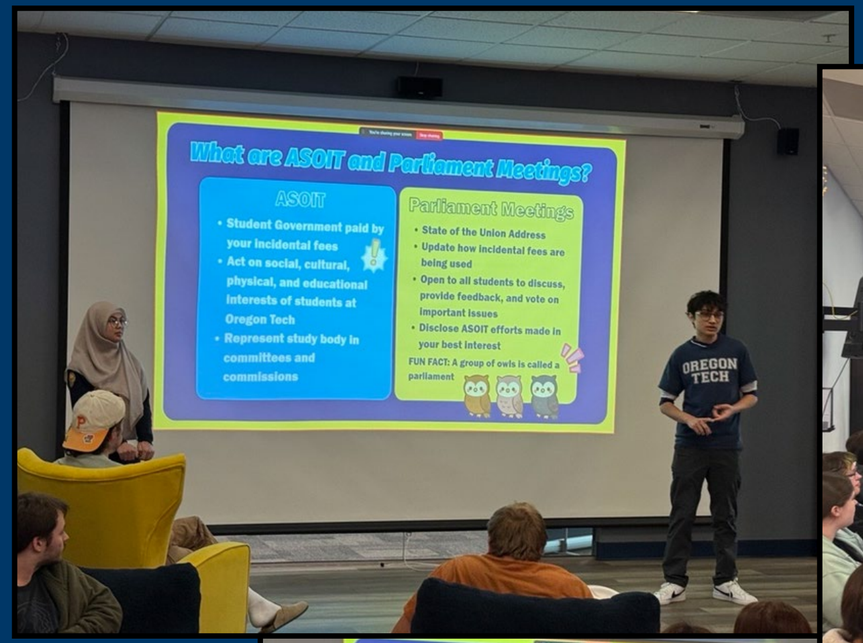
Chris Nunez*

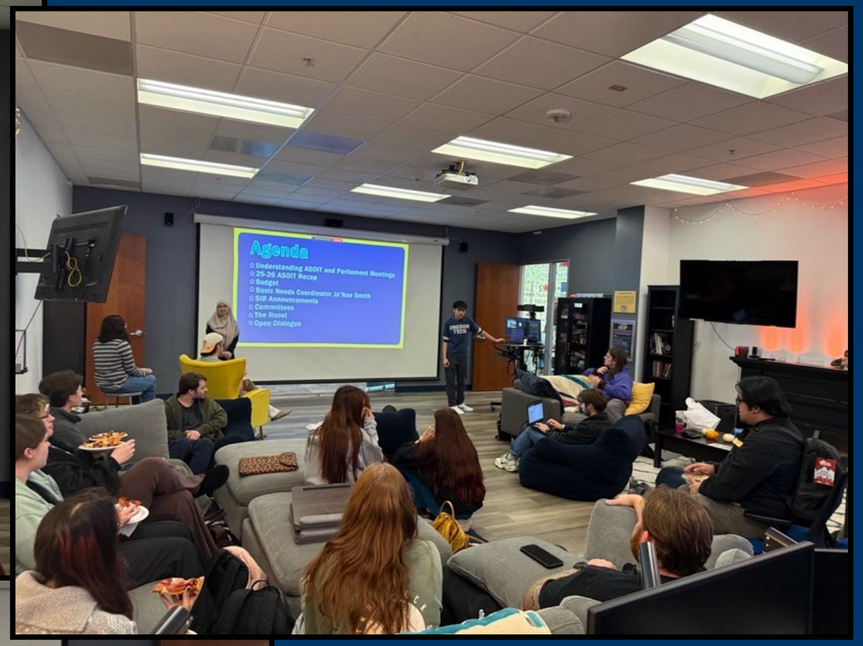
Student Outreach Officer

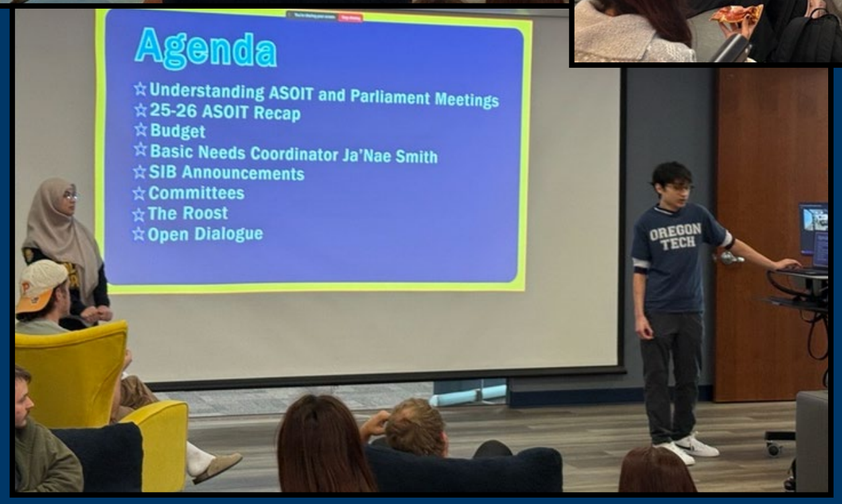
Dev Sahay*

*Hiring paperwork in progress.

October 2026 Parliament Meeting







- First Parliament Meeting of the year
- Foundation for rest of year: introductions, budget, last year recap, etc.
- Platform for student services: SIB, Basic Needs
- Held Open Dialogue for students to voice concerns, advertise clubs, discuss platform ideas
- High student attendance

Thank you



3.2

Faculty Senate Report

Oregon TECH
Faculty Senate

Faculty Senate Report
Oregon Tech Board of Trustees

November 3, 2026

Ashton Greer, Ph.D., P.E. - Faculty Senate President

Senate Priorities & Committee Charges – Academic Standards Committee

1. Provide a recommendation for a revised curriculum approval process, in collaboration with the Curriculum Planning Commission (CPC), the Registrar, the Deans, the Provost, and other relevant units. In developing this recommendation, consider and report on curriculum approval processes at other institutions.

Senate Priorities & Committee Charges – Faculty Policy Committee

1. Complete revisions to *OIT-20-030 Indefinite Tenure Selection*
2. Revise *OIT-20-035 Post-Tenure Review*
3. Revise e-Portfolio Guidelines for Promotion, Tenure, and Post-Tenure Review
4. Provide a recommendation and justification regarding rescinding *OIT-20-016 Faculty Merit Pay*
5. If time allows, revise *OIT-21-030 Department Chair Selection and Evaluation*
6. If time allows, draft an expedited tenure policy for department chairs and/or senior faculty who negotiate to be awarded tenure upon hire.

Senate Priorities & Committee Charges – Inclusive Excellence Committee

1. Review and analyze the results of the 2025-2026 Inclusive Excellence Survey, and make recommendations for action based upon findings.

Other initiatives we're supporting

- Retention efforts led by Strategic Enrollment Management (SEM) and the university Retention Committee
- Online course offering quality led by the Online Learning Advisory Council (OLAC)
- Development of a new Comparator Institution List led by the Provost
- Development of new Student Evaluations of Instruction questions led by the Commission on College Teaching (CCT)

Faculty Senate – Administrative Council Collaboration

- Faculty Senate and Admin Council have been deeply engaged in discussion about how we can work together to support institutional operations
- Admin Council hosted Faculty Senate during their October Department Spotlight – this invitation has already led to collaborative opportunities.
- Co-organized and held a successful “Cheers, Chats, & Colleagues” social event on October 28th, attended by faculty and staff of all classifications.

Challenges and Opportunities

- Challenges:
  - Heavy instructional overload in certain departments
  - Limited capacity for service & institutional initiatives
  - Balancing immediate operational needs with long-term improvement

- Opportunities:
  - Increased willingness to engage across different units & classifications
  - Earlier, more collaborative problem solving

3.3
Admin Council Report

Administrative Council

Partnership, progress and the administrative staff experience

Board of Trustees | November 3, 2026

Michelle Meyer, Chair

COMPETENCE EQUIPS.
CHARACTER GUIDES.
IMPACT MULTIPLIES.

*Heart & Mind Installation in Martha Anne Dow Center for Health Professionals

WHO WE ARE

A staff voice in shared governance

Administrative Council represents the ideas, interests and welfare of Oregon Tech's unclassified administrative staff.

1997

Created by the President

A longstanding component of Oregon Tech shared governance.

ADVISE

Bring staff perspectives forward

Help ensure staff perspectives are represented in conversations with the President and university leadership.

CONNECT

Strengthen the university community

Build relationships across administrative staff, colleagues, departments and locations.

How Administrative Council contributes

Policy review • staff communication • campus representation • recognition • positive workplace culture • recommendations on university-wide matters

COMPETENCE EQUIPS.
CHARACTER GUIDES.
IMPACT MULTIPLIES.

*Heart & Mind Installation in Martha Anne Dow Center for Health Professionals

2026–27 EXECUTIVE TEAM

Representing administrative staff across Oregon Tech

Executive Team representatives serve two-year terms and provide leadership, liaison and shared-governance connections.

CHAIR
Michelle Meyer — Klamath Falls

VICE CHAIR
Trent LaMont — OMIC R&D

SECRETARY
Loree Hyde — Portland-Metro

TREASURER
Tracey Lehman — Klamath Falls

MARKETING OFFICER
Gale Bloom — Portland-Metro

PUBLIC RELATIONS OFFICER
Karen Blevins — Klamath Falls

FOAC LIAISON
Josh Winter — Klamath Falls

FACULTY SENATE LIAISON / PRESIDENT'S COUNCIL REPRESENTATIVE
Celia Green — Klamath Falls

PRESIDENTIAL APPOINTEE
SVP John Harman — Klamath Falls

FACULTY SENATE APPOINTEE
Ed Clint — Klamath Falls

Leadership roles connect Administrative Council with the President, President's Council, Fiscal Operations Advisory Council and Faculty Senate.

COMPETENCE EQUIPS.
CHARACTER GUIDES.
IMPACT MULTIPLIES.

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PROGRESS

From staff input to visible results

Recent work reflects practical advocacy, institutional connection and recognition of staff contributions.

Performance management

Staff feedback to OHR on the new evaluation process; training was provided to unclassified staff.

Professional development

Convocation professional-development sessions and continued focus on staff learning.

Policy alignment

Updated the Administrative Emeritus policy to align with the Faculty Emeritus policy.

Department awareness

Feature departments and university functions in open meetings to build institutional awareness and a shared understanding of roles across the university.

Community connection

Support beautification projects, Spirit Week, Spirit Days and colleague connections.

Summer schedule pilot

Partnered with the President and senior leadership to develop and implement the Summer Fridays pilot.

COMPETENCE EQUIPS.
CHARACTER GUIDES.
IMPACT MULTIPLIES.

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RECOGNIZING ADMINISTRATIVE STAFF

Celebrating expertise, persistence, and service

Banner reimplementation

Administrative Council recognized colleagues across teams, roles and locations whose expertise, persistence, flexibility and collaboration were instrumental to the successful Banner reimplementation and optimization.

Recognition belongs not only to project teams, but also to the broader university community that learned new processes and helped carry the work forward.

Kudos Award

Monthly recognition for administrative colleagues who go above and beyond.

Owl-Star Partner Award

A way to share gratitude and appreciation for on-campus partners.

COMPETENCE EQUIPS.
CHARACTER GUIDES.
IMPACT MULTIPLIES.

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LISTENING AND CONNECTION

More ways for staff to be heard

Administrative Council is expanding access to feedback, recognition and open conversation across locations.

OPEN MEETINGS

Monthly meetings create space for information, discussion and department spotlights.

CAMPUS BOXES

New suggestion boxes are available in Klamath Falls and Portland-Metro.

TECHWEB

A digital feedback tile supports questions, ideas, concerns, Kudos nominations and future topics.

EXECUTIVE TEAM

Staff may connect directly with an Administrative Council representative.

The objective is simple: clear routes for staff to contribute, receive information and see their involvement reflected in university conversations.

COMPETENCE EQUIPS.
CHARACTER GUIDES.
IMPACT MULTIPLIES.

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LEADERSHIP PARTNERSHIP

Support that made a meaningful difference

Administrative Council appreciates the leadership support that has made a positive difference in the administrative staff experience.

01

SUMMER FRIDAYS

Support from Dr. Nagi and division Vice Presidents helped make the Summer Fridays pilot possible.

02

ADDITIONAL PAID HOLIDAYS

Additional paid holidays during the 2026 holiday season provide valuable time for rest and connection.

03

ADMINISTRATIVE STAFF SALARY INCREASES

Administrative staff salary increases reflect meaningful investment in employees and recognition of their contributions to Oregon Tech.

Thank you for your continued commitment to hearing staff perspectives and for your partnership on meaningful improvements.

COMPETENCE EQUIPS.
CHARACTER GUIDES.
IMPACT MULTIPLIES.

*Heart & Mind Installation in Martha Anne Dow Center for Health Professionals

2026–27 GOALS

Seven priorities for connection, growth, and impact

The goals build on Administrative Council's core role while adding explicit focus on retention and innovation.

01	**Department understanding**	Increase understanding of departments and how their work supports the university.
02	**Professional development**	Expand staff learning, mentorship and development opportunities.
03	**Campus community**	Support events that encourage collaboration, connection and community.
04	**Relationships**	Strengthen relationships among colleagues and departments.
05	**Communication**	Provide clear, timely and consistent Administrative Council updates.
06	**Student retention**	Strengthen the staff connections, services and practices that support student success and persistence.
07	**Innovation**	Encourage staff innovation while creating opportunities to surface, test and share ideas that improve university work.

New for 2026–27: Explicit emphasis on retention and innovation.

COMPETENCE EQUIPS.
CHARACTER GUIDES.
IMPACT MULTIPLIES.

*Heart & Mind Installation in Ma

onals

SPIRIT WEEK

Multiple locations. One university.

The week of October 26 creates shared opportunities for colleagues to connect across Oregon Tech.



FEATURED EVENT

Cheer, Chats & Colleagues

October 28

A shared Spirit Week experience designed to bring colleagues together across Oregon Tech locations.

Different campuses and workplaces • shared identity • one Oregon Tech community

COMPETENCE EQUIPS.
CHARACTER GUIDES.
IMPACT MULTIPLIES.

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STRATEGIC ALIGNMENT

Administrative Council as an implementation partner

PREMIER PLACE TO WORK

- Department understanding
- Professional development
- Relationships
- Communication
- Retention

COMMUNITY

- Campus events
- Cross-location connection
- Recognition and belonging

STUDENT SUCCESS & RETENTION

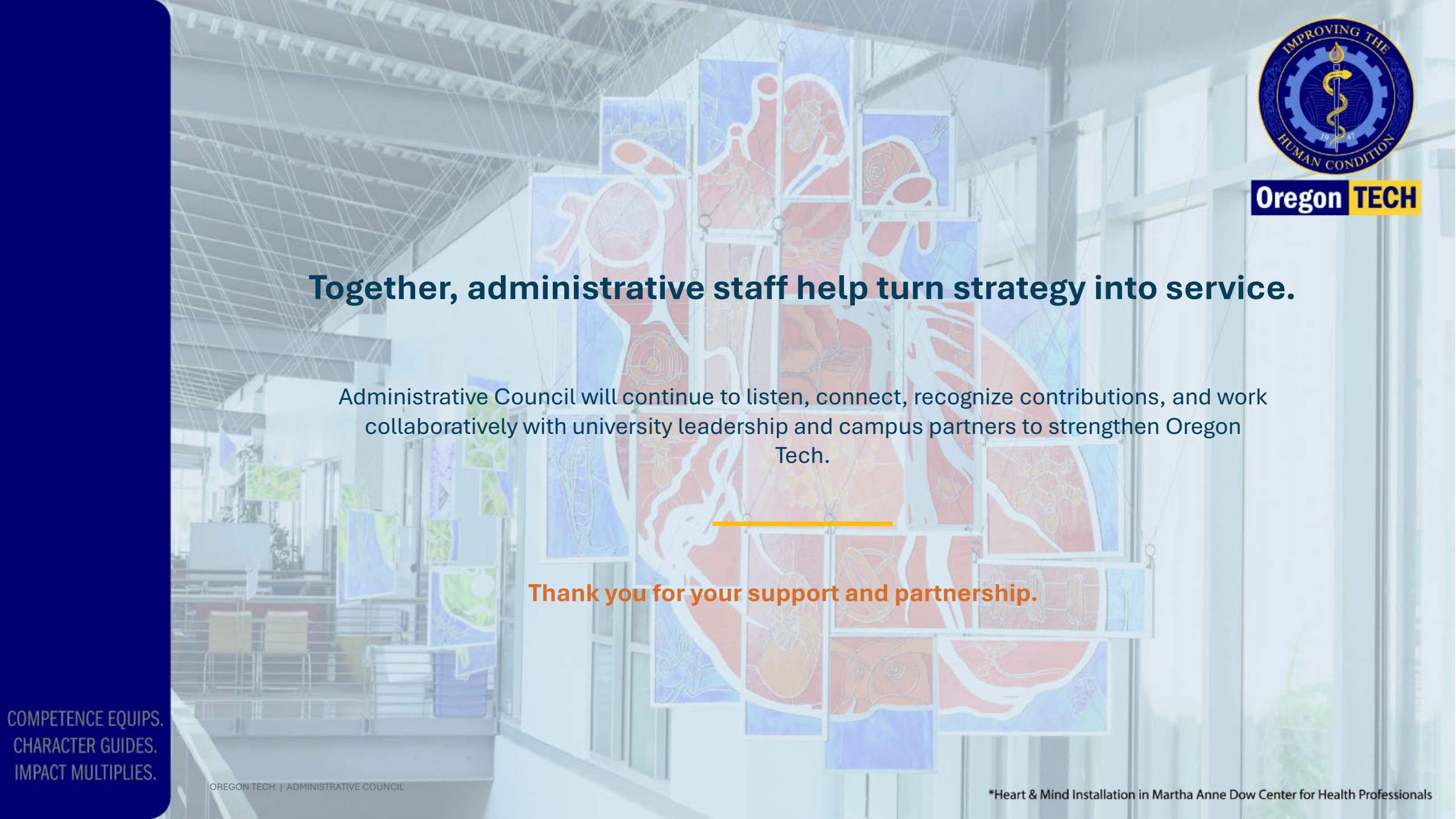
- A stable, informed and engaged administrative workforce
- Staff practices that support the student experience

INNOVATION & IMPROVEMENT

- Staff ideas and feedback
- Testing practical improvements
- Sharing effective practices across units

COMPETENCE EQUIPS.
CHARACTER GUIDES.
IMPACT MULTIPLIES.

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Together, administrative staff help turn strategy into service.

Administrative Council will continue to listen, connect, recognize contributions, and work collaboratively with university leadership and campus partners to strengthen Oregon Tech.

Thank you for your support and partnership.

COMPETENCE EQUIPS.
CHARACTER GUIDES.
IMPACT MULTIPLIES.

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3.4
Foundation Report

Foundation Board President Report - Board of Trustees Meeting

November 3, 2026

Fundraising results:

To date, the foundation has raised approximately ~$1.27 million toward our $7.2 million fundraising goal for this fiscal year ending June 30, 2027. We also received a grant notification for medical imaging equipment from the Roundhouse Foundation.

There are several gifts in the "closing phase" that have not yet been booked, and we recently received substantial gift-in-kind donations, including physics equipment from a retired physicist and a laser vibrometer from Intel.

For the Forging Excellence comprehensive campaign, we have raised $15.5 million, which is 40% of our overall campaign goal. We are also working on an accounting of notified planned gifts made during the campaign. Once we have fully cleared all planned gift notifications, we will see a substantial increase in our goal achievement.

I'm also pleased to share that the Oregon Tech Foundation has received a clean audit. This is an important reflection of the Foundation's commitment to strong financial stewardship and accountability, and I want to thank the Foundation Board, staff, and everyone involved for helping us remain responsible stewards of the resources entrusted to us. Also of note, our total assets exceeded $60 million.

We have some exciting events coming up in November that highlight the impact of philanthropy at Oregon Tech.

Later today, we will celebrate the ribbon-cutting for the Kip Thomet Memorial Athletic Fieldhouse in Klamath Falls. This transformative new indoor training facility was made possible through the generosity of donors, and we are excited to celebrate its completion and the opportunities it will provide for Oregon Tech students and scholar-athletes.

Our Foundation Board Meeting and Annual Scholarship Banquet will be held on Saturday, November 7, in Klamath Falls. The banquet is one of our favorite events of the year because it brings together students who have received scholarships and the donors whose generosity made those scholarships possible. We will hear from student scholarship recipients, which is always a great reminder of the personal impact scholarships have on students.

We will also celebrate the Stillwell Stadium canopy ribbon-cutting on November 20 at 3:00 PM. This is a particularly special project because it began as a civil engineering capstone

project by Oregon Tech students and has grown into an improvement that will enhance the game-day experience at the softball field.

Then, on Saturday, November 21, we will gather in Klamath Falls for the Oregon Tech Foundation Holiday Party, giving us an opportunity to celebrate the season and another year of supporting Oregon Tech and its students.

In closing, we also look forward to supporting the university's medical school endeavor while continuing to grow scholarships and other resources that directly benefit students. Together, these efforts represent exciting opportunities to strengthen Oregon Tech and expand its impact for years to come.

This concludes my report, and I'll be happy to answer questions.

8.1

Action Item: Approval of Amendments to Sections 3.0 and 4.1 of the Board Policy on Board Committees

ACTION ITEM

Agenda Item No. 8.1

Recommendation to Revise Board Policy on Board Committees, Sections 3.0 & 4.1

Rationale for Amendment of Section 3.0

Section 3.1 of the Board Policy on Board Committees provides that the Finance & Facilities Committee "shall also sit as the Audit Committee," and Sections 3.4 through 3.6 set out the committee's audit and compliance responsibilities. At the request of the Committee Chair, this amendment renames the committee the Finance, Facilities & Audit Committee (FF&A) so that its name reflects the full scope of its work. The committee's agendas and minutes have noted its audit role since its inception. Adopting the name helps to codify it as a Board policy.

See Attachment A for redlined version of "Board Policy on Board Committees," reflective of amendments.

Rationale for Amendment of Section 4.1

It brings AQSS in line with Finance & Facilities (F&F) Committee policy. Section 3.1 bars only the Board Chair from F&F Committee membership. The Chair stays available as an alternate for each.

See Attachment A for redlined version of "Board Policy on Board Committees," reflective of amendments.

Recommendation to the Full Board for Approval of Amendments to Sections 3.0 and 4.1 of the Board Policy on Board Committees

After discussion and review of the documents, the Chair of the Executive Committee moves to recommend to the full Board of Trustees the approval of amendments to Section 3.0 and Section 4.1 of the Board Policy on Board Committees, renaming the Finance & Facilities Committee the Finance, Facilities, & Audit Committee, with conforming changes throughout the policy document, and removing the Vice Chair of the Board from the prohibition on appointment and serving as Chair in the Academic Quality and Student Success Committee.

Attachments and Additional Information

Attachment A- Redlined Version of "Board Policy on Board Committees"

Board Policy on Board Committees
Board of Trustees of Oregon Institute of Technology

1.0 Standing Committees

Subject to the requirements of applicable law, the Board may establish such Standing Committees and Ad Hoc Committees as it deems appropriate or necessary from time to time and shall define the duration, existence, duties, membership and reporting requirements of such committees. The Standing Committees of the Board shall be the Executive Committee; ~~Finance & Facilities Committee~~ Finance, Facilities, and Audit Committee; and Academic Quality and Student Success Committee. Standing Committees may consist only of Trustees, continue until terminated by the Board, and develop a charter for approval by the Board. The term of Ad Hoc Committees, if any, shall be one year or less. An Ad Hoc Committee shall include at least one Trustee, engage in information gathering and reporting only, and make any report or recommendation to the Chair of the Board or the Chair of a Standing Committee.

2.0 Executive Committee

2.1 The Executive Committee (EC) of the Board of Trustees shall sit as the Executive and Governance Committees of the Board. The Chair and Vice Chair of the Board and the chairs of the ~~Finance & Facilities Committee~~ Finance, Facilities, and Audit Committee and Academic Quality and Student Success Committee shall each be a voting member of the EC, and the Chair of the Board shall select additional voting members to ensure a minimum of six. The University President shall serve on the EC as an ex officio, non-voting member. The Chair of the Board shall be the chair of the committee. During the absence or incapacity of the Chair, the Vice Chair shall be the chair. During the absence or incapacity of the Chair and the Vice Chair, the Chair shall appoint a chair from the Trustees.

2.2 When sitting as the Executive Committee, the EC shall represent and, except as prohibited by applicable law, may act for the Board on any matter, except for the hiring or removal of the President of the University. The committee should generally endeavor to refer matters to the Board, but it is expected that the committee will act for the Board when the committee determines it to be necessary or appropriate. The committee shall submit reports on its actions to the Board.

2.3 When sitting as the Executive Committee, the EC shall consider matters pertaining to the hiring, employment, and removal of the President of the University. Such matters, except for the hiring or removal of the President, shall be referred to the Board as seconded motions. The hiring or removal of the President shall be referred to the Board as a proposed motion.

2.4 When sitting as the Governance Committee, the EC may consider matters pertaining to the board membership development and board performance. Matters that may be brought to the committee include, but are not limited to, the following examples:

- 2.4.1 Identifying expertise needed by the Board and communicating with the Governor's office about the nomination of future trustees.
- 2.4.2 Recommending Board Officers for Board approval.
- 2.4.3 Evaluating the performance of the President and Board Secretary.
- 2.4.4 Assessing the performance of the Board and member trustees.

The Office of the Secretary to the Board is responsible for providing staff support to the Committee.

3.0 ~~Finance & Facilities Committee~~ Finance, Facilities, and Audit Committee

3.1 There shall be ~~a Finance & Facilities Committee (FFC)~~ Finance, Facilities, and Audit Committee (FFAC) that shall also sit as the Audit Committee. At the Board's second regular meeting of each odd-numbered calendar year or such other time as determined by the Board, the Board Chair shall appoint the chairperson and other members of the ~~FFC~~ FFAC. The Chair of the Board shall not be appointed to the ~~FFC~~ FFAC but may act as an alternate or may appoint an alternate, including voting, in the event of the absence of any committee member at any regular, special or emergency meeting.

3.2 All matters considered by the FFC that require action by the Board shall be referred, as appropriate, to the Board or the Executive Committee for action as a seconded motion unless authority to act on behalf of the Board has been delegated expressly to the ~~FFC~~ FFAC. Subsequent to the transaction of any business under express delegated authority, the ~~FFC~~ FFAC shall render a report on the business to the Board.

3.3 The ~~FFC~~ FFAC may consider matters pertaining to the financial, capital, and other assets of the University. Matters that may be brought before the Committee include, but are not limited to, the following examples:

- 3.3.1 Budget—matters relating to the University's operating and capital budgets and requests for appropriation of state funds.
- 3.3.2 Investments and Finances—matters relating to the University's investments, finances, financial accounts, and debt finance.
- 3.3.3 Tuition and Fees—matters relating to tuition and mandatory enrollment fees.
- 3.3.4 Real Property—matters related to the acquisition, management, development and disposal of real property.
- 3.3.5 Personal Property—matters related to the acquisition, management, development and disposal of personal property, tangible and intangible.
- 3.3.6 Risk Management—matters relating to risk management, insurance, and risk transfer devices.

Any of the above enumerated examples of matters brought before the ~~FFC~~ FFAC may be directed to any other committee or the Board for consideration.

3.4 When sitting as the Audit Committee, the ~~FFC~~ FFAC may consider matters pertaining to audits and compliance. Matters that may be brought before the committee include, but are not limited to, the following examples:

- 3.4.1 Audits and Internal Controls—matters relating to external and internal auditors, audit plans and reports, and internal controls.

- 3.4.2 Compliance—matters relating to compliance with legal and regulatory requirements.

3.5 All matters considered pursuant to section 3.4 by the ~~FFC~~ FFAC sitting as the Audit Committee that require action by the Board shall be referred to the Board as a seconded motion unless authority to act on behalf of the Board has been delegated expressly to the ~~FFC~~ FFAC. Subsequent to the transaction of any business under such express delegated authority, the committee shall render a report on the business to the Board.

3.6 Any of the examples of matters brought before the ~~FFC~~ FFAC sitting as the Audit Committee pursuant to section 3.4 may be directed to any other committee or the Board for consideration.

4.0 Academic Quality and Student Success Committee

4.1 There shall be an Academic Quality and Student Success Committee (AQSSC). At the Board's second regular meeting of each odd-numbered calendar year or such other time as determined by the Board, the Board Chair shall appoint the chairperson and other members of the AQSSC. The Chair ~~and Vice Chair~~ of the Board shall not be appointed to the AQSSC but may act as an alternate~~s~~, including voting, in the event of the absence of any committee member at any regular, special or emergency meeting.

4.2 All matters considered by the AQSSC that require action by the Board shall be referred, as appropriate, to the Board or the Executive Committee for action as a seconded motion unless authority to act on behalf of the Board has been delegated expressly to the AQSSC. Subsequent to the transaction of any business under express delegated authority, the AQSSC shall render a report on the business to the Board.

4.3 The AQSSC may consider matters pertaining to the teaching, research, and public service programs of the University and to its faculty, staff, and students. Matters that may be brought before the Committee include, but are not limited to, the following examples:

- 4.3.1 Faculty and Staff Affairs—matters relating to the faculty and the professional and classified staff, including their status and responsibilities, discipline and welfare.
- 4.3.2 Educational Policy—matters relating to educational policy, including achievement compacts, admissions requirements, instruction, curriculum, degrees, research, educational technology, distance learning, public services activities, and the establishment and disestablishment of educational and research organizational units.
- 4.3.3 Student Welfare—matters relating to the general welfare of students, including housing and food services, health services and health insurance, safety, extracurricular activities, sports programs, and policies governing student discipline and student organizations.

Any of the above enumerated examples of matters brought before the AQSSC may be directed to any other committee or the Board for consideration.

5.0 Notice of Meetings of Standing Committees

Meetings of Standing Committees of the Board shall be held at such times and places as may be fixed by each committee or its chair. The Secretary shall cause the required notices of meetings of Standing Committees to be sent to each member of the Board. The Secretary shall also cause the preparation of

the minutes, any audio recording, audio and video recording, streaming audio, or streaming audio and video of the meeting. The Secretary shall cause the minutes and any recording or transmission to be maintained in accordance with applicable records retention requirements.

6.0 Quorums

A majority of the members of a Standing Committee shall be necessary to constitute a quorum. With the exception of the officers identified in Article VI of the Board Bylaws, faculty and all other University staff including student employees of any committee may not participate in any discussions or action by the committee, or attend any executive session of the committee, involving collective bargaining issues that affect faculty or non-faculty staff at the university.

7.0 Information Gathering and Investigation

The Chair of the Board, or the Vice Chair during the Chair's absence or incapacity, may appoint one to three members of the Board and one or more other persons to gather information and provide it to the Board or a Board Committee. The Chair of a Standing Committee may appoint one to three members of the Standing Committee or one or more other persons to gather information and provide it to the Standing Committee.

8.2

Action Item: Approval of Capital Project Submission for Semon Hall Renovation and Expansion

ACTION ITEM

Agenda Item No. 8.2

Recommendation to Proceed with Capital Project Submission for Semon Hall Renovation and Expansion

Background

During the full session of the Oregon Legislature, in odd calendar years, the Legislature reviews and considers capital funding requests for the next biennium. Oregon Public Universities (OPU) submit their capital requests to the Higher Education Coordinating Commission (HECC) where they are ranked using the HECC Strategic Capital Development Plan and are then packaged in the Governor's Biennial Budget Request that is submitted to the Legislature.

At the April 2026 Finance and Facilities Committee meeting, staff provided an informational report on the submission to HECC of the Semon Hall Renovation and Expansion Project entitled *"Revitalizing Semon Hall: Advancing the Healthcare Workforce and Addressing Community Needs"*. The proposal was developed over several months through a collaborative process involving faculty, staff and students as well as academic and administrative leadership and considered current and future classroom and laboratory needs as well as degree program expansion.

Semon Hall is a 36,290 square-foot educational building on the Klamath Falls campus and was constructed in 1965, making it one of the oldest buildings on the campus. After 60 years, the building needs significant rehabilitation and renewal. The proposed $54 million project includes a complete renovation of the current building as well as a 13,500 square-foot expansion yielding a revised building footprint of 49,790 square-feet (see Attachment A).

The building is home to degree programs in Dental Hygiene, Marriage and Family Therapy, Physical Therapy, Physics and Communications and will also house the future Dental Therapy program. Funding for the project is outlined in the Capital Request and is summarized in the Table below.

Semon Hall Renovation and Expansion Funding				
Type of Funding Requested	Project State Funding Amount Requested	Univerity Project Funding Requested	Biennial Debt Service	Debt Service Funding Source
Oregon Tech Match (5%)	$ -	$ 2,700,000	$ -	Institutional Funds
General Funds/Lottery Funds	-	-	-	N/A
Article XI-F Bond Funds	-	-	-	Other Funds
Article XI-G Bond Funds	2,700,000	-	-	General Fund
Article XI-Q Bond Funds	48,600,000	-	-	General Fund
Lottery Revenue Bonds	-	-	-	Lottery Funds
Total	$ 51,300,000	$ 2,700,000	$ -	

Staff Recommendation

After discussion and review of the documents, and **with the Recommendation of the Finance and Facilities Committee, staff requests a Motion by the Board for Approval for the President or his Designee to Advance the Semon Hall Capital Project Submission to the Legislature for Funding Consideration, to Provide the Required University Match and to Accept State Bond Funding if Awarded.**

Attachments and Additional Information

Attachment A- *"Revitalizing Semon Hall: Advancing the Healthcare Workforce and Addressing Community Needs"*

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Oregon TECH
Oregon Institute of Technology
OFFICE OF THE PRESIDENT
3201 Campus Drive, Klamath Falls, OR 97601
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April 1, 2026

Higher Education Coordinating Commission
Attn: Dr. Greg Hamann, Chair
Ben Cannon, Executive Director
255 Capitol Street NE, 3rd Floor Salem, OR 97301

Re: 2027-29 Capital Project Submission for the Oregon Tech Semon Hall Revitalization Project

Dear Chair Hamann, Executive Director Cannon, Members of the Commission, and Staff,

It is with great pleasure that I provide the Higher Education Coordinating Commission (HECC) with the Oregon Institute of Technology (Oregon Tech) capital construction project request for the 2027-2029 biennium.

Oregon Tech appreciates the opportunity to propose a revitalization of Semon Hall, which is located on the Klamath Falls campus and is home to the Dental Hygiene program – which offers the only Bachelor of Science in Dental Hygiene degree at a public institution in the state of Oregon. The revitalized building will not only provide a much-needed modernization of the Dental Hygiene learning environment, it will also allow two other allied health graduate programs (Marriage and Family Therapy & Physical Therapy) to expand hands-on learning opportunities for students while providing support to our rural community.

The Semon Hall Revitalization Project is the university's only capital project for the 2027-2029 biennium. Oregon Tech is asking the State of Oregon to contribute $51.3 million towards this $54 million, 49,790-gross-square-foot project, which includes the construction of a modest 13,500 square foot addition and revitalization of the existing 36,290 square foot space.

As Oregon's designated Polytechnic University, Oregon Tech is committed to engaging students in the learning process through hands-on, applied experiences. This is especially true within our allied health curricula during which students work with actual patients in a supervised setting in order to hone their skills. Marriage and Family Therapy students must complete a Practicum experience in which they facilitate counseling with couples and families, while Physical Therapy students engage in Integrated Clinical Experiences (an accreditation requirement) with community members. Further, Dental Hygiene students provide low or no-cost oral hygiene services to at-risk populations (such as veterans, low income, and the elderly) as well as the community at large. The proposal includes the creation of Active Learning Labs ("A+ Labs" for short) in which students will engage in the hands-on experiences described above with real-

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world patients on the Klamath Falls campus. Revitalizing Semon Hall will provide the opportunity for the students in these allied health programs to put their skills into practice on campus while simultaneously addressing significant community healthcare needs.

These healthcare needs, caused by the statewide healthcare workforce shortage, are acutely experienced in Klamath Falls and its surrounding communities, given their location in rural, Southern Oregon. Klamath County is designated as a Health Care Provider Shortage Area (HPSA) for both Dental Health and Mental Health by the Health Resources and Services Administration[1], and the county routinely ranks the lowest of all Oregon counties in terms of unmet healthcare need.[2] Further, HECC's Strategic Capital Development Plan[3] notes that the *Health, Healthcare Administration, & Management* sector represented the third highest gap between Average Annual Job Openings and Average Annual Regional Program Area Completers (i.e. graduates in those fields).

There are simply not enough healthcare graduates to meet the need, which is only expected to worsen over time. The shortage, while most acutely experienced across rural Oregon also impacts urban communities as rural citizens must travel to urban areas to receive care. Although Oregon Tech graduates are employed across the state, the workforce gap continues. As a result, Oregon Tech is proposing to increase the Dental Hygiene class size by 20% and launch a Dental Therapy program to provide additional support to the dental workforce. Similarly, the Marriage and Family Therapy and Physical Therapy programs will increase their respective cohort sizes upon full accreditation to meet healthcare gaps. Thus, the Semon Hall revitalization project is critical not only at the programmatic level, but also at an institutional level, as Oregon Tech strives to meet its mission to provide professionally-focused higher education resulting in state-wide impact.

Further, the proposal aligns with state priorities as outlined in the Strategic Capital Development Plan[3], Equity Lens framework[4], Strategic Development Plan 4.0 (2024-2029)[5], and Strategic Roadmap[6] by supporting programs designed to:

- Focus on current and future state needs[6] by closing the healthcare workforce gap.[3]
- Increase information transfer through research endeavors[3] by promoting collaborative research among allied health programs and industry partners.
- Serve underserved populations[4], including rural communities and students who come from poverty.
- Break the cycle of poverty[4] by elevating income trajectories for graduates.
- Improve responsiveness and align Oregon's education and training systems to create straightforward pathways for learners[5] by establishing career pipelines with the local public schools, community college, and regional hospital system.
- Transform and innovate[6] by expanding current program offerings and modernizing the learning environment to engage today's learners.

---

[1] Health Resources and Services Administration. (2026). Health Provider Shortage Areas.
[2] Oregon Office of Rural Health. (September 2025). Oregon areas of unmet healthcare need report.
[3] HECC (2019). Strategic Capital Development Plan.
[4] HECC (2021). Equity Lens.
[5] HECC (2026). Strategic Development Plan 4.0.
[6] HECC (2021). Strategic Roadmap.

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As one example of modernization need, the Dental Hygiene space in Semon Hall has not been updated since it began in 1970. As a result, the learning environment has fallen behind industry standards with dental chair units so outdated that manufacturers are unable to provide replacement parts and service. The existing space fails to simulate dental environments of today, which is an obstacle to student learning, engagement, recruitment, and retention. As a result, the proposed revitalization includes a modest increase of student workspace in the Dental Hygiene lab to accommodate contemporary dental chairs and pass-through cabinetry to house radiology equipment accessible by adjacent workspaces, among other upgrades. Further upgrades described in-depth within the proposal support the Strategic Capital Development Plan priorities[3] and will include:

- Modern instructional modalities including the upgraded Dental Hygiene space and equipment as well as Active Learning Laboratories (A+ Labs).
- Flexible configurations to include classrooms and study areas with modular furniture to promote collaborative learning.
- Welcoming student-centered environment with additional outlets for portable devices and settings to engage learning communities throughout their cohort-based programs.
- ADA-compliant accessibility for ease of access by university community members and industry partners.

The revitalized learning environment will bring A+ Labs for Dental Hygiene, the future Dental Therapy program, Marriage and Family Therapy, and Physical Therapy together in Semon Hall, resulting in greater opportunity for interdisciplinary efforts. Allied health students benefit from Interprofessional Education (IPE) experiences as they enhance their understanding of other healthcare professions, promote professional collaboration, and mimic team-based care found in today's healthcare models. The revitalization project will enable IPE experiences, as well as research opportunities, and facilitate referrals for community members who might benefit from services offered by other allied health A+ Labs. Co-locating these spaces will bring students, industry healthcare professionals, faculty members, and community members into consistent proximity fostering interprofessional instruction, research efforts, and community-engaged service.

Thank you for your consideration of this proposal, and your ongoing commitment to supporting high-quality postsecondary education.[5] We recognize that there is a great deal of fiscal uncertainty both at the federal and state levels, and are honored for you to consider investing in the future of the allied health programs at Oregon Tech, and by extension, Klamath Falls and the surrounding rural communities which we serve. Throughout the submission you will read quotations from a variety of stakeholders across the state who support this proposal, thereby confirming the widespread impact the revitalization of Semon Hall can achieve.

Respectfully,

DocuSigned by:
Nagi Naganathan
6B9CA1E0D200440...

Dr. Nagi Naganathan, Ph.D., ASME Fellow
President

REVITALIZING SEMON HALL:

Advancing the Healthcare Workforce and Addressing Community Needs



Oregon TECH

2027-2029 Capital Project Request

April 6, 2026

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I. LEGISLATIVE EXECUTIVE BOND SUMMARY

The Semon Hall Revitalization Project at Oregon Institute of Technology (Oregon Tech) will renew and modernize a critical academic facility on the Klamath Falls campus that no longer meets current instructional, safety, seismic, or accessibility standards. Semon Hall: Advancing the Healthcare Workforce and Addressing Community Needs (Semon Hall Revitalization Project) / (Project) includes a comprehensive renovation of Semon Hall and a limited building addition of approximately 13,500 gross square feet. Together, these investments address functional deficiencies, code compliance and academic needs necessary to sustain and expand workforce-focused healthcare and allied health education.

Semon Hall is identified in Oregon Tech's January 2024 Facilities Master Plan as having a Facilities Condition Index (FCI) rating of "Poor." The building does not meet current seismic standards and contains significant accessibility deficiencies that cannot be addressed through incremental repairs, creating an increasing risk of loss of use for academic programs housed in the facility.

The project directly supports Oregon's healthcare and allied health workforce needs by enabling the expansion and modernization of high demand programs housed in Semon Hall, including Dental Hygiene, development of a new Dental Therapy program, Doctor of Physical Therapy, and Marriage and Family Therapy (Master's). These programs prepare graduates for licensed, in-state practice in fields experiencing persistent workforce shortages and accessibility for patients particularly in rural and underserved communities.

The Project advances student success for underserved populations by removing physical and instructional barriers that disproportionately affect rural students, first generation students, low-income students and students with disabilities. Modernized, accessible instructional and clinical education and training spaces will support inclusive, hands-on learning environments and strengthen equitable pathways from education to employment.

Consistent with the Higher Education Coordinating Commission's (the HECC) Strategic Capital Development Plan (SCDP), the Semon Hall Revitalization Project prioritizes capital renewal over new construction, reinvesting in an existing Education & General (E&G) facility while minimizing long-term operating and maintenance impacts. The Project represents a strategic use of state bond capacity and institutional resources to reduce deferred maintenance, improve safety and accessibility, mitigate loss of use risk and preserve a vital academic asset aligned with Oregon Tech's polytechnic mission and statewide workforce priorities.

II. INSTITUTION CAPITAL PLAN INFORMATION

1. Facilities Master Plan

Oregon Tech adopted a comprehensive Facilities Master Plan in January 2024, which serves as the foundational planning document for the university's capital investments and facilities stewardship strategy. The 2024 Facilities Master Plan includes the Klamath Falls and Portland-Metro campuses and integrates long-range space planning with a detailed Facilities Condition Assessment (FCA) prepared by an interdisciplinary team of architects and consulting engineers experienced with Oregon Tech's facilities portfolio.

The 2027–29 Capital Project Request, Semon Hall Revitalization Project, is directly informed by and consistent with the priorities established in the 2024 Facilities Master Plan.

Key findings of the 2024 Facilities Master Plan include the identification of multiple campus facilities requiring renewal based on FCI analysis, a nationally recognized metric used to assess the relative condition and reinvestment need of existing buildings. Semon Hall is classified as having an FCI rating of "Poor," indicating that the building has exceeded its intended service life for major systems and requires comprehensive reinvestment to remain viable for academic use.

The FCA underlying the Facilities Master Plan was conducted in accordance with ASTM International *(formerly American Society for Testing and Materials)* (ASTM) E2018 – Standard Guide for Property Condition Assessments, which evaluates the physical condition and expected remaining useful life of major building systems and infrastructure. The assessment identified components anticipated to require repair or replacement within short-, mid- and long-term planning horizons (approximately two, 10, and 15 years), with associated cost estimates expressed in constant dollars.

Consistent with ASTM E2018 standards, the FCA focuses on physical condition and does not assign costs for deficiencies related to seismic performance or accessibility where those conditions reflect changes in current code requirements rather than deferred maintenance. However, the 2024 Facilities Master Plan documents that Semon Hall does not meet current seismic design standards and contains pervasive accessibility deficiencies, reinforcing the need for a comprehensive renovation approach rather than incremental repairs.

The 2024 Facilities Master Plan was developed through a collaborative process ensuring alignment with Oregon Tech's academic mission, workforce-oriented programs, and long-term stewardship responsibilities. The 2024 Facilities Master Plan, including supporting appendices and visual documentation, is maintained by Oregon Tech Finance and Administration and is publicly available through the university's Facilities Management and Capital Planning resources.

2. Deferred Maintenance: Education & General Needs

2.1. Deferred Maintenance: Managing Facilities and Addressing Future Needs

Oregon Tech manages E&G facilities through a preventive maintenance and capital renewal framework informed by objective facility condition data and long-range planning. The university utilizes FCA and the FCI to evaluate building condition, identify deferred maintenance and renewal needs, and prioritize reinvestment across its facilities portfolio, as documented in the January 2024 Facilities Master Plan, and is reviewed annually through the institution's Capital Improvement and Renewal (CIR) inventory assessment process.

The university maintains a two-tiered deferred maintenance strategy designed to make efficient use of limited operating and state capital resources:

1. Targeted investments in maintaining and extending the useful life of major building systems, including Mechanical, Electrical and Plumbing (MEP) systems, and core infrastructure across the university's capital portfolio; and
2. Major renovation or replacement projects for entire buildings and related subsystems once obsolescence is reached and it is more cost effective to rehabilitate or replace facilities rather than continue incremental repairs.

This multitiered approach allows Oregon Tech to balance near-term maintenance needs with long-term capital renewal, minimizing stranded investment and maximizing the useful life of buildings and subsystems. Deferred maintenance and renewal priorities are coordinated through the 2024 Facilities Master Plan and the annual capital budgeting process, ensuring alignment between long-range planning and near-term investment decisions.

Projects are prioritized based on life safety considerations, mission critical academic use, accreditation and program risk, accessibility and potential loss of use. Facilities that directly support high demand, workforce aligned academic programs receive particular attention due to their importance to institutional mission and student success.

An example of this integrated approach is the recently completed Boivin Hall Renovation, which eliminated approximately $5.0 million (2021 dollars) in identified deferred maintenance, completed a critical seismic retrofit, replaced outdated MEP systems, significantly improved energy efficiency and ADA accessibility, modernized laboratories and classrooms, improved access control, and brought underutilized space into productive academic use through reorganization aligned with current pedagogical needs.

Oregon Tech supports its maintenance and capital repair activities through three primary mechanisms:

1. University funded personnel, supplies, and services, providing in-house capacity for routine maintenance, troubleshooting, and small to medium scale system replacements and upgrades;

2. State CIR projects, supporting medium to large-scale repairs such as roofing, HVAC and building system upgrades; and
3. State and institution bond funded major renovation and rehabilitation projects, such as the completed Boivin Hall renovation and the proposed Semon Hall Revitalization Project.

Oversight of this framework is provided through quarterly reviews by the Finance and Facilities (F&F) Committee of the Oregon Tech Board of Trustees, which evaluates the university's multiyear capital renewal and replacement plan, including projects underway, the upcoming year's work plan and future planned investments. This integrated approach enables Oregon Tech to steward state capital assets responsibly while avoiding undue cost pressures on students.

In fiscal year 2025, Oregon Tech allocated approximately $1.0 million, or 1.4 percent of its E&G operating budget, to building maintenance, facilities operations, project management and small rehabilitation projects. This investment excludes state funded CIR resources, which further augment institutional capacity to maintain and reinvest in campus facilities.

Figure 1: Semon Hall Deferred Maintenance – Reoccurring HVAC Coil Leaks



On a quarterly basis the F&F Committee of Oregon Tech's Board of Trustees reviews the university's multi-year CIR plan. This includes projects that are underway, the upcoming year's project plan and subsequent year's prospective project plans. The university currently has $74.6 million in identified deferred maintenance for E&G space, not inclusive of all needed seismic retrofitting. Given construction inflation and the continued aging of Oregon Tech's facilities, this estimate likely significantly understates the actual deferred maintenance backlog.

2.2. Deferred Maintenance: Set Aside Account

Oregon Tech will establish a university funded capital set aside account for the revitalized Semon Hall to proactively address future E&G deferred maintenance needs associated with the facility. The set aside account will support long-term stewardship of the revitalized facility by providing a dedicated funding mechanism for planned system renewal and capital reinvestment over the building's life cycle.

The set aside account will complement the university's existing preventive maintenance and capital renewal framework by ensuring that future deferred maintenance needs for the revitalized facility are addressed in a timely and systematic manner. This approach aligns with the HECC's SCDP emphasis on reducing future deferred maintenance risk and promoting sustainable management of state funded capital assets.

Deferred maintenance and capital renewal across the broader facilities portfolio will continue to be addressed through the annual operating budget, state funded CIR programs and bond funded major renovation projects identified through the 2024 Facilities Master Plan. Establishment of a specific set aside account for Semon Hall represents an additional, targeted commitment to long-term asset stewardship associated with this major capital investment.

3. Deferred Maintenance: Estimated Backlog

Estimate Methodology

Oregon Tech's estimate of its total E&G deferred maintenance backlog is based on a comprehensive FCA completed as part of the 2024 Facilities Master Plan. The FCA was prepared by independent architects and consulting engineers in accordance with ASTM E2018 – Standard Guide for Property Condition Assessments and evaluates the physical condition and remaining useful life of major building systems and infrastructure across the Klamath Falls and Portland-Metro campuses. Deferred maintenance needs were identified at the system level, categorized by short-, mid- and long-term planning horizons, and expressed in constant dollars. Consistent with ASTM standards, the FCA focuses on physical condition and does not include costs associated with seismic upgrades or accessibility improvements where those conditions reflect changes in current code requirements rather than deferred maintenance; those needs are tracked separately for capital planning and prioritization purposes.

Since publication of the 2024 Facilities Master Plan, Oregon Tech has continued to validate and refine deferred maintenance estimates through regular inspections, annual CIR planning and detailed project scoping. Backlog estimates are further informed by recent realized construction costs from comparable capital renewal projects. Actual project costs from the renovation of Boivin Hall and other recent CIR and bond funded projects provide market tested benchmarks that are incorporated into backlog validation to reflect current labor, materials and delivery conditions. In addition, Oregon Tech considers evolving regulatory requirements, including Oregon House Bill 2688 (2025), which has increased design, documentation and compliance related costs for public facilities, and is reflected in planning level assumptions. Together, the FCA based inventory, ongoing validation, realized project costs and regulatory inputs support a conservative and

defensible estimate of the university's deferred maintenance backlog, consistent with the methodology and figures presented in Table 1, below.

E&G Facilities - Estimated Deferred Maintenance Backlog

From this analysis, Oregon Tech estimates approximately $74.6 million in deferred maintenance for E&G facilities, based on projected costs for 2026; roughly $67.0 million is needed at the Klamath Falls campus and $7.6 million at the Portland-Metro campus. The new findings replaced outdated Sightlines data with a customized facility database, which helps plan, set priorities and carry out CIR projects.

Deferred maintenance priorities are set according to safety concerns, facility conditions, critical academic needs, accessibility and risk of lost use. These priorities guide long-term capital planning, yearly budgeting, and the selection of major renovation projects, including the proposed Semon Hall Revitalization Project, all in-line with the HECC's SCDP.[1]

Table 1: Oregon Tech Deferred Maintenance Needs

Oregon Tech 2027-2029 Capital Projects Request - Deferred Maintenance Needs

Identified Deferred Maintenance - Education & General								
	BUILDING	MEP SYSTEMS	EXTERIOR	INTERIOR	SEISMIC	LIFE SAFETY	ADA	BLDG. TOTAL
1	Learning Resource Center	$ 6,601,222	$ 3,127,035	$ 2,664,235	$ 1,344,234	$ 649,149	$ -	$ 14,385,875
2	Semon Hall	5,195,575	1,951,805	1,470,046	964,153	605,546	-	10,187,125
3	Boivin Hall	-	1,028,765	-	-	-	-	1,028,765
4	Cornett Hall	320,000	922,000	-	-	-	-	1,242,000
5	Purvine Hall	4,366,169	1,200,000	2,651,962	1,334,298	332,000	-	9,884,429
6	Facilities	936,509	613,060	754,415	539,950	214,749	-	3,058,683
7	Portland-Metro	5,470,945	1,166,400	-	-	974,400	-	7,611,745
8	Owens Hall	2,106,829	1,316,765	49,440	-	260,000	-	3,733,034
9	Snell Hall	685,965	224,000	295,420	-	140,000	-	1,345,385
10	Dow Center	1,257,444	1,166,400	-	-	640,000	-	3,063,844
11	Athletics (70%)	1,383,777	53,200	1,414,262	1,165,865	182,000	-	4,199,104
12	Campus	11,300,000	-	-	-	-	3,600,000	14,900,000
							Total Deferred Maintenance Needs	$ 74,639,989

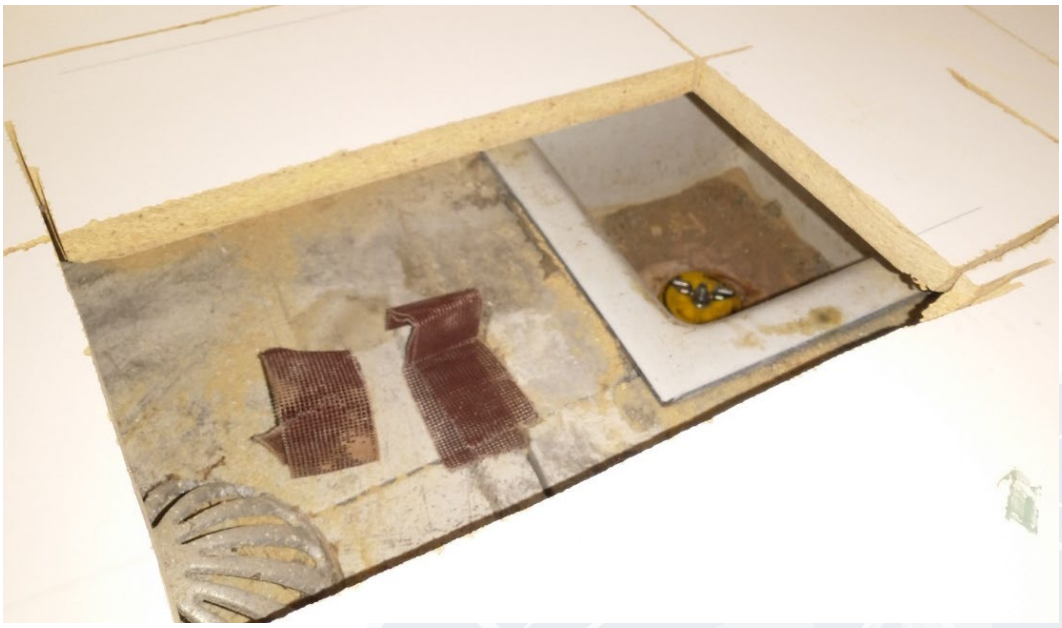
The Semon Hall Revitalization Project is a vital component of Oregon Tech's strategy for addressing its deferred maintenance backlog, prioritizing reinvestment in a significant E&G facility. Semon Hall faces several critical challenges: non-compliance with the Americans with Disabilities Act (ADA), outdated and inefficient building systems and a failure to meet contemporary seismic safety requirements. Although many major systems have surpassed their intended service life, the building's durable structural framework offers a solid base for comprehensive rehabilitation. This method provides a cost-effective alternative to full replacement, optimizing the value of the existing asset.

Consistent with the SCDP, Oregon Tech has concluded that renewing and adaptively reusing facilities such as Semon Hall is more economical than undertaking new construction.[1] This approach not only reduces long-term operating and maintenance costs but also enhances the functional efficiency of the institution's infrastructure. The Project integrates deferred maintenance mitigation, code compliance improvements and modernization within a cohesive investment strategy. This unified effort addresses existing deficiencies, extends the building's useful life and ensures it continues to serve as a valuable institutional resource.

[1] HECC. (2019). Strategic Capital Development Plan.

Deferred maintenance priorities for this initiative were established through the FCA methodology outlined in the 2024 Facilities Master Plan and refined via ongoing CIR planning and detailed project scoping. This analysis demonstrates the Project will eliminate roughly $10.2 million in deferred maintenance related to Semon Hall's primary systems. By targeting a facility with a FCI rating of "Poor," the Project reflects a deliberate commitment to advancing institutional priorities and supporting statewide objectives for capital stewardship. See Figure 2, below, for photographic documentation of Semon Hall deferred maintenance conditions.

Figure 2: Semon Hall Deferred Maintenance – Abandoned Floor Sink Under Cabinetry in Dental Hygiene Lab



Additional photographic documentation is provided in *Section III., Project Summary, Section 5.2 (Additional Photos)*.

4. Seismic Upgrade Needs

Oregon Tech estimates institution-wide seismic upgrades will cost about $5.4 million, based on facility findings and preliminary assessments. This figure highlights current deficiencies impacting safety and resilience and is designed for use in long-term capital planning, not as a final cost. The actual need is believed to be substantially higher; however, a comprehensive, systemwide seismic analysis has not yet been completed.

Oregon Tech's 2024 Facilities Master Plan outlines the seismic upgrade needs for E&G facilities. The plan highlights significant vulnerabilities in many buildings, especially at the Klamath Falls campus. Several core academic, student support and administrative structures, including Semon Hall, the Learning Resource Center, Purvine Hall and the Facilities Building, were built between the 1960s and early 1980s and have not been fully retrofitted for seismic safety.

Following ASTM standards for FCA, the total scope and cost for seismic improvements have not been fully calculated in the deferred maintenance inventory. Seismic and code compliance issues are excluded from FCA cost totals when they reflect updated building codes rather than deferred maintenance, or when detailed engineering studies were not possible due to resource limits.

Semon Hall illustrates these challenges. It does not comply with current seismic codes and has widespread accessibility issues that cannot be resolved through simple repairs. Therefore, both seismic and accessibility upgrades are central to the proposed Semon Hall Revitalization Project, which aims to comprehensively address life safety and code compliance concerns in a cost-effective manner.

Seismic resilience is particularly important given the university's operational history and location. The Klamath Falls campus has suffered from damaging earthquakes, notably in the early 1990s, which severely impacted Snell Hall. Meanwhile, the Portland-Metro campus has not recently undergone seismic performance evaluations under extreme conditions, suggesting further assessment is necessary.

As a result, seismic upgrades and related code improvements are emphasized as key parts of major renovation efforts, especially at the Klamath Falls campus. Oregon Tech is considering its potential role as a critical facility for disaster recovery agencies following a Cascadia Subduction Zone earthquake. Strengthening seismic resilience in essential facilities is vital to protect life, preserve operations and enable the university to support emergency response during regional crises.

5. Bond-Funded Projects Requiring Reauthorization

Oregon Tech does not have prior authorized projects that require reauthorization during the 2027 Legislative Session.

6. Demolition

Currently, Oregon Tech does not intend to demolish any campus facilities. However, if funding becomes available, the university would consider removing Miller Hall and constructing a Facilities storage building adjacent to existing Facilities structures, as recommended in the 2024 Facilities Master Plan.

III. PROJECT SUMMARY

1. Project Data

1.1. Working Title: Semon Hall Revitalization Project

1.2. Project location address or campus location:

Oregon Tech, 3201 Campus Drive
Klamath Falls, OR 97601

Please refer to the map on the next page.

1.3. Academic programs served:

Dental Hygiene
Future home of Dental Therapy
Doctor of Physical Therapy
Marriage and Family Therapy (Masters)
Active Learning Labs (A+ Labs)
Communications
Humanities and Social Sciences
Physics

1.4. Total project cost: $54,000,000

1.5. State funding request: $51,300,000

1.6. Committed external funds: $2,700,000

University Matching Funds are already available and are on hand.

1.6.1 *Gift amount:* N/A
1.6.2 *Plant funds amount:* $2,700,000
1.6.3 *Specify amount and source of other funds:* N/A

1.7. Total gross square feet: 49,790 square feet

1.8. Total net square feet: 44,811 square feet

Final net square footage will be confirmed during the design phase; at this stage, the estimated net usable square feet (NUSF) is 44,811 square feet.

Net usable square feet (NUSF) refers to the total area within a building allocated for academic programs, as well as supporting spaces like mechanical rooms, corridors, restrooms and other areas necessary for the building's operation. These spaces are not assigned to specific program uses but are vital to the functionality of the facility. This definition is consistent with the Postsecondary Education Facilities Inventory and Classification Manual (FICM).

1.9. Project Start and Completion Dates:

Design is anticipated to commence in alignment with state bond issuance, spring 2029, with construction anticipated to be completed by spring 2032. However, Oregon Tech may consider initiating architectural and design activities in advance of bond issuance, subject to institutional and state approvals, as a potential strategy to mitigate overall project costs.

Early engagement in the design phase would allow the university to advance technical planning for laboratory and instructional spaces and position the Project to better manage construction and equipment pricing in a volatile market. This approach may also support earlier validation of specialized allied health and technical equipment requirements and improve cost certainty prior to construction procurement. Any such early activities would be undertaken in a manner consistent with state requirements and fiscal stewardship practices.



2. DAS Required Bond Forms 107BF11a and 107BF12

This information can be found in *Appendix A (DAS Bond Forms).*

3. Unmet Capacity Need, Raise Facility Quality, Improve Infrastructure and Fulfill Special Need

3.1. Resolve an Unmet Capacity Need

The Semon Hall Revitalization Project resolves an unmet capacity need in order to enhance instructional pedagogy and provide expanded experiential labs for Oregon Tech healthcare and behavioral health (collectively referred to throughout the document as allied health) programs including Dental Hygiene, Doctor of Physical Therapy, and Marriage and Family Therapy, and an anticipated launch of Dental Therapy. By renewing and reconfiguring instructional and laboratory space to meet current program and accreditation requirements, the Project supports sustainable growth of program cohorts that are currently constrained by outdated space.

Semon Hall has served as a core teaching, learning and clinical training building on Oregon Tech's Klamath Falls campus for over 60 years. It houses the general education and healthcare departments: Dental Hygiene, Communications and Humanities, and Social Sciences including classrooms and student laboratories.

Semon Hall is one of the oldest buildings on the Klamath Falls campus, having been constructed in 1964. It was built well, but now at 62 years old, is exceedingly outdated, poorly suited in its current configuration for the needs of students today, particularly those who have ADA challenges and many of its major subsystems, including ventilation, mechanical, electrical and plumbing are past the end of their useful life.

Semon Hall is a single story 36,290 square feet steel structure that has historically been the home to a variety of Oregon Tech academic programs.

- **Mechanical**: Over the years, Semon Hall has undergone numerous changes in use, resulting in a variety of HVAC systems of differing ages. This patchwork of equipment makes it challenging to maintain stable and comfortable temperatures throughout the building, negatively impacting the Dental Hygiene environment. The facility relies on outdated pneumatic controls and the outside air dampers are in urgent need of replacement. Additionally, the main supply and exhaust air handling units have reached the end of their operational lifespan.
- **Electrical:** The electrical switch gear manufactured by General Electric is original to the building and obsolete.
- **Life Safety:** The building does not have a fire sprinkler system and there are no duct smoke detector devices in the fire life safety alarm system.
- **Hazardous Materials:** Semon Hall still contains a significant amount of asbestos building material on the exterior and interior of the building.

- **Energy Envelope**: Approximately 70 percent of the building's exterior glazing is single-pane, with little to no exterior insulation within wall cavities. In addition, the age and configuration of the existing HVAC system limit overall energy performance. Collectively, these conditions significantly constrain the building's ability to achieve contemporary energy-efficiency targets, including those established under Oregon House Bill 3409 (2023).

Building exterior contains the following:

- 11,600 sq./ft. of cement asbestos board (8% chrysotile asbestos)

Building interior contains the following:

- 780 lin./ft. of asbestos containing rope (80% chrysotile asbestos)
- 2,693 sq./ft. of asbestos containing floor tile and mastic (8% chrysotile asbestos)
- 2,693 sq./ft. of asbestos containing ceiling tile (5% amosite asbestos)
- 3,940 sq./ft. of asbestos containing duct batt insulation paper (2% chrysotile asbestos)
- 173 lin./ft. of asbestos containing pipe insulation (10% chrysotile asbestos)

Semon Hall's layout and building systems no longer support current instructional models or accessibility expectations and multiple major subsystems including laboratory support, ventilation and core MEP are at or beyond end of life. As noted in the SCDP,[1] facilities of this age are typically less flexible and efficient, cost more to operate and require comprehensive renewal to meet current codes and environmental health and safety standards.

The Semon Hall Revitalization Project will comprehensively renew the facility and add an approximate 13,500 square feet northside addition to support program growth. Project scope includes a seismic retrofit; replacement of MEP systems; building-envelope replacement; foundation repair; and full modernization of classrooms, laboratories and dental lab spaces. Site work will improve accessible circulation and mobility/transportation connections and include landscaping that supports building performance and long-term site stability. The north addition will expand Dental Hygiene capacity and provide space for the new Dental Therapy program to address documented enrollment demand and regional oral-health workforce needs.

Capacity needs for the allied health programs housed in Semon Hall are already constraining enrollment and limiting Oregon Tech's ability to respond to workforce demand. Additional dedicated space is required to launch the new Dental Therapy program and the existing Dental Hygiene cohort size is capped due to space limitations. The Doctor of Physical Therapy program also requires additional space in order to grow cohort size, with space needs required and defined by accreditation standards for instruction, simulation and clinical experiences. Similarly, Marriage and Family Therapy enrollment is capped due to current constraints and the lack of appropriately configured clinical training and supervision space. Colocating Dental Hygiene, Dental Therapy, Doctor of Physical Therapy, and Marriage and Family Therapy within one renewed facility also creates opportunities for operational and instructional efficiencies. As the programs share similar accreditation expectations for supervised, practical experience in clinical settings, allowing flexible scheduling and shared use of instructional and patient-facing spaces. Together, these capacity

investments will remove current constraints, support accreditation compliance and enable sustainable enrollment growth across all four programs.

3.2. Raise Facility Quality

Revitalizing Semon Hall will significantly raise the facility quality by more efficiently configuring the learning environment to improve pedagogy and support student learning. According to the SCDP (Executive Summary, Key Finding 5)[1], contemporary educational spaces should be designed to: accommodate modern instructional modalities; promote student engagement within learning communities; utilize modular, flexible configurations; and present a welcoming, student-centered environment.

Modern Instructional Modalities

One of the hallmarks of Oregon Tech's curriculum is a focus on experiential learning, evidenced by its designation as "Oregon's Polytechnic University." Revitalizing Semon Hall will expand the opportunity for students to gain experience working with real-world patients rather than simply learning about them from a textbook. By allocating significantly more space in the building to laboratories, students in Semon Hall will be able to spend quality time on campus putting the skills they have learned in class to practice. For more details on the Project's "A+ Labs", please see *Section V. Strategic Capital Development Priorities, Section 1.1. (Proposal Increases the Capacity and Effectiveness of Instructional Space)*.

Additionally, the current lab space for Dental Hygiene is comprised of a series of small cubicles, with computer screens attached to the dental chairs (see Figure 3, below)

Figure 3: Small Cubicles in Existing Dental Hygiene Lab



This existing space is a poor representation of future work environments for students in the dental hygiene field. The dental units break down frequently and are so outdated that the manufacturers no longer provide parts or service. Further, patients who have had dental cleanings within the past 50 years are familiar with the best practice of positioning the computer screen on a console behind the patient, for better viewing access by the dental hygienist and dentist, with the added benefit of increasing patient comfort. Additionally, contemporary dental spaces have X-ray machines placed in cabinets between workspaces to increase efficiency and to avoid having to transport patients to other areas within the dental clinic to complete imaging.

Prospective students apply to multiple dental hygiene programs and outdated facilities impact Oregon Tech's ability to competitively recruit. Exit surveys from students leaving the program consistently note the poor state of the facility as a top concern, noting that they will be working in dental environments that are a stark contrast to those in which they have trained at Oregon Tech.

The Semon Hall Revitalization Project includes an approximate 69 percent increase in academic space square footage, accommodating modern dental chairs that are appropriately sized, a console for technology and tools, and pass-through cabinetry to house radiology equipment accessible by two adjacent workspaces, among other classroom and lab space improvements. Additional planned modernizations include the addition of digital equipment in the Materials Lab where patient molds are created (to include 3D printing) and space for digital patient check-in at reception. Such modernization will greatly advance instructional pedagogy and student learning as the updated environment will more accurately simulate the workspaces in which they will function as licensed hygienists. These advances raise the quality of the facility by bringing the learning environment into the 21st century to meet best practices in the dental hygiene field.

As a polytechnic university, we should be providing not only current technologies but also exposing students to future technologies.

Our current facilities contain antiquated equipment.

I would like us to be known as the dental hygiene program that provides cutting-edge technological training in areas such as digital scanning, 3D tray fabrication, and AI charting and diagnostics.

- Krista Beaty,
Dental Hygiene Program Chair

Learning Communities

Due to the nature of allied health majors at Oregon Tech, students are admitted to the programs as a cohort, meaning that they progress through all coursework and labs together. The cohort, in effect, becomes a learning community for each student, providing connections and social support as well as opportunities for collaborative learning through study groups and shared experiences. All allied health programs that will utilize space in Semon Hall (Dental Hygiene, Dental Therapy, Doctor of Physical Therapy, and Marriage and Family Therapy) are cohort-based learning communities and will maximize use of the space through collaborative learning.

Modular, Flexible Configurations

With Semon Hall constructed over six decades ago, building classrooms are configured in antiquated ways, providing little opportunity for students to re-arrange and adjust desks and tables for collaborative work. Additionally, the facility features "double-loaded corridors" designed for

"student throughput rather than student success" (pg.19), which, as the SCDP[1] notes, is an ineffectual use of space. The Semon Hall Revitalization Project takes this into consideration by modernizing classrooms with a modular approach, allowing interaction between cohorts of students. For example, there is currently no space in the building for all four cohorts of Dental Hygiene students to gather and learn from one another; in the revitalized building, space has been allocated for a modular classroom that can be utilized by all Dental Hygiene students to gather, break into small groups and share their knowledge with one another.

> *I do think that the condition of the building does affect many aspects of being in the Dental Hygiene program. It would be very nice to have some* ***student spaces updated*** *and added. I think that a study room would be great to have as we spend most of our day in the same building. In one of these areas, or in its own room, it would be great to have a more comfortable lounge room with couches or more relaxing seating.*
>
> ***- Carson W,***
> *Current Student*

Welcoming, Student-Centered Environment

As can be imagined, an academic building from the 1960's is not as student-centered as would be expected according to current academic standards. The Project includes modern features that students have come to expect, including additional device charging stations, appropriate lighting and collaborative workspaces.

By intentionally modernizing instructional and experiential space, promoting collaborative learning using modular design and creating a welcoming student-centered environment, the Semon Hall Revitalization Project will significantly raise the quality and vibrancy of the facility.

3.3. Improve Campus Infrastructure

The Project will improve campus infrastructure by comprehensively renewing a highly utilized academic building that is not ADA compliant and contains aging, inefficient and end of life building systems that present increasing operational, life safety and reliability risks. The Semon Hall Revitalization Project includes full replacement and modernization of mechanical, electrical and plumbing systems; building envelope components; interior infrastructure; and supporting systems that have exceeded their useful life and require capital renewal rather than continued repair.

As part of this Project investment, Semon Hall continues to be integrated with the campus geothermal utility system for building heating and heated pedestrian walkways, resulting in improved energy efficiency, system resiliency and winter accessibility. Geothermal integration reduces long-term heating and maintenance costs compared to conventional systems while supporting reliable year-round building and site operations.

Building infrastructure improvements will enhance facility reliability, energy performance and maintainability, reducing emergency repairs and unplanned service disruptions. Modernized systems will be integrated with campus facilities management and building control platforms, improving system monitoring, operational efficiency and long-term asset performance. Replacement of outdated systems will also improve indoor environmental quality and support safe, effective instructional and laboratory operations.

The Project addresses seismic vulnerabilities, ADA accessibility deficiencies and code compliance issues that cannot be resolved through incremental repairs, reducing the risk of loss of use for a mission critical academic facility. Site infrastructure improvements, including accessible circulation routes and walkways, will strengthen connectivity between Semon Hall and surrounding campus facilities.

By consolidating infrastructure renewal, deferred maintenance reduction, ADA compliance and geothermal system integration into a single coordinated investment, the Semon Hall Revitalization Project improves the resilience, sustainability and operational efficiency of Oregon Tech's campus infrastructure. These improvements align with the SCDP's emphasis on renewal of existing assets and reduce long-term capital and operational risks associated with aging facilities.[1]

3.4. Fulfill Special Need

The Semon Hall Revitalization Project fulfills a special need consistent with HECC guidance by delivering full ADA and universal design compliance in a mission critical facility that supports laboratory, clinical and classroom-based instruction for healthcare and allied health programs central to Oregon's workforce pipeline. As mentioned above, Semon Hall is not ADA compliant and existing conditions restrict equitable physical access to instructional spaces, laboratories, clinical training areas and supporting facilities, limiting participation by students, faculty and community members with disabilities.

As a primary instructional and clinical training facility, Semon Hall must meet a higher standard of accessibility than general classroom space. Many existing barriers related to circulation, vertical access, room configuration and supporting infrastructure cannot be resolved through incremental improvements without significant disruption to academic operations. A comprehensive renovation is required to achieve full ADA compliance for modern instructional and laboratory environments and to ensure reliable, long-term access for all users.

In addition, the Project addresses a second, programmatic special need directly tied to workforce delivery and accreditation-based clinical training requirements. As demonstrated in *Section III. Project Summary, Section 3.1 (Resolving an Unmet Capacity Need*), capacity constraints within Semon Hall are limiting enrollment and slow Oregon Tech's ability to produce graduates in high demand health professions. Additional space is required to launch Dental Therapy, a profession intended to expand access to oral healthcare in rural communities. The Dental Hygiene program's cohort size is capped due to space limitations, constraining the supply of licensed hygienists. Similarly, the Doctor of Physical Therapy, and Marriage and Family Therapy programs require additional instructional, simulation and clinical space defined by accreditation standards to support cohort growth and meet workforce demand in physical and behavioral health services.

By colocating Dental Hygiene, Dental Therapy, Doctor of Physical Therapy, and Marriage and Family Therapy programs within a renewed facility, the Project enables shared use of specialized laboratories, simulation environments and patient facing clinical space required for supervised, hands-on instruction. This co-location strengthens workforce throughput by supporting consistent accreditation compliance, improving scheduling flexibility and increasing instructional efficiency across programs with similar clinical and experiential learning requirements. Together, these

investments remove current constraints, protect program accreditation and enable sustainable enrollment growth across multiple healthcare disciplines critical to Oregon's rural and regional workforce needs.

4. HECC Capital Project Cost Summary Form

This information can be found in *Appendix B (HECC Capital Project Cost Summary)*.

5. Additional Text, Photos and Graphics

5.1 Cost Assumptions

Oregon Tech developed its capital project budget using cost estimates reasonably expected at the anticipated project start date, informed by current market conditions and projected escalation through the planned construction period. Assumptions reflect recent experience with public higher education capital projects in Oregon and anticipated inflation through bond issuance and construction.

Project cost estimates were developed in consultation with an independent architectural and design firm experienced in healthcare, clinical and instructional facilities for Oregon governmental entities, including community colleges and public universities, providing relevant benchmarks for scope, regulatory compliance and regional construction conditions. Cost assumptions also reflect continued escalation affecting nonresidential and clinical facilities, including impacts associated with Oregon House Bill 2688 (2025), the Bipartisan Infrastructure Bill and other state and regional requirements influencing labor availability and construction delivery. These impacts are anticipated to add to contractor demand through 2029 – 2032, the expected construction period of the Project.

In addition, estimates for specialized clinical and technical equipment were informed by external vendor pricing and recent market quotes, reflecting current availability, lead times and installation requirements typical of clinician-setting environments. These inputs were used to validate order-of-magnitude estimates without assuming fixed pricing in advance of final design and procurement.

Ongoing market volatility driven by supply-chain constraints, labor pressures and elevated demand, including federally funded infrastructure activity, is reflected through appropriate contingencies and escalation consistent with state guidance and institutional practice.

Operational efficiencies and long-term cost savings associated with system modernization, energy performance and geothermal integration are addressed separately in *Section IV. Business Plan, Section 1. (Operations Overview)*.

5.2 Additional Photos

Figure 4: Conceptual View of Semon Hall with Northside Addition and Planned Enhancements for Mobility and ADA Accessibility

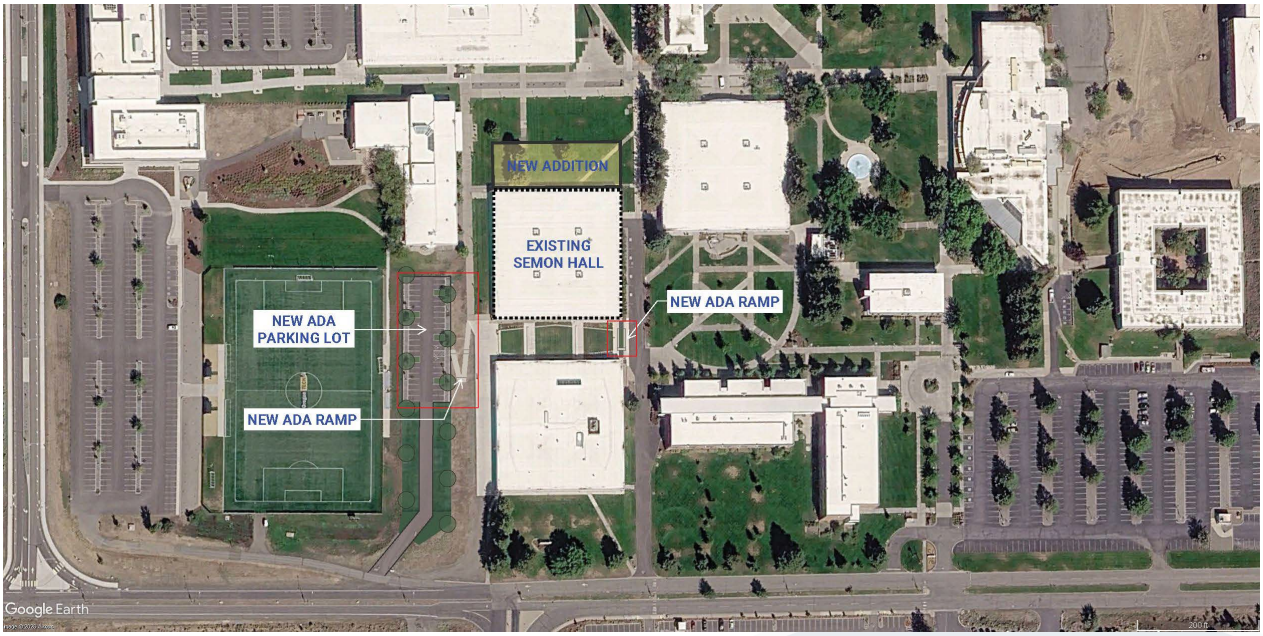


Figure 5: Semon Hall Deferred Maintenance - Obsolete GE Switchgear



Figure 6 (right): Semon Hall Deferred Maintenance - Asbestos Vinyl Flooring and Ceiling Tiles, and Obsolete Lighting – Physics Storage Area



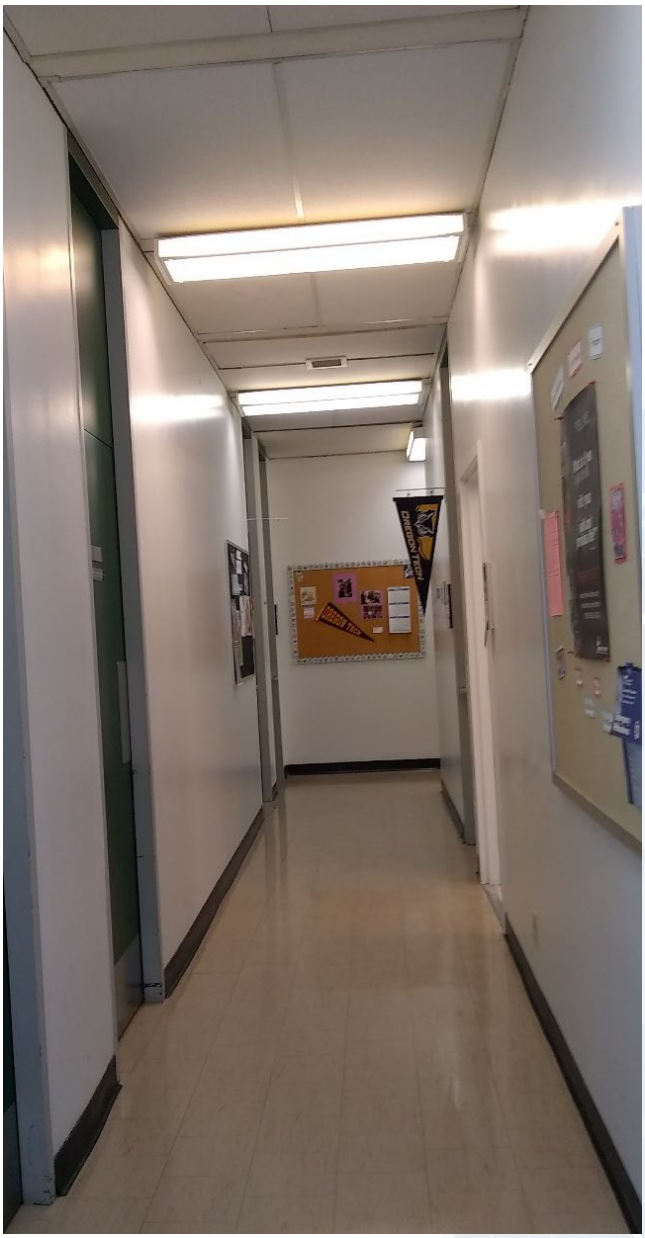


Figure 7 (left): Semon Hall Deferred Maintenance - Asbestos Vinyl Flooring and Ceiling Tiles, and Obsolete Lighting – Office Area

Figure 8: Semon Hall Deferred Maintenance - Cement Asbestos Soffit and Under Window Panels, and Single Pane Glazing



Figure 9: Semon Hall Deferred Maintenance - Obsolete GE Sub-Transformer



Figure 10: Semon Hall Deferred Maintenance - Obsolete HVAC Pneumatic Controls System

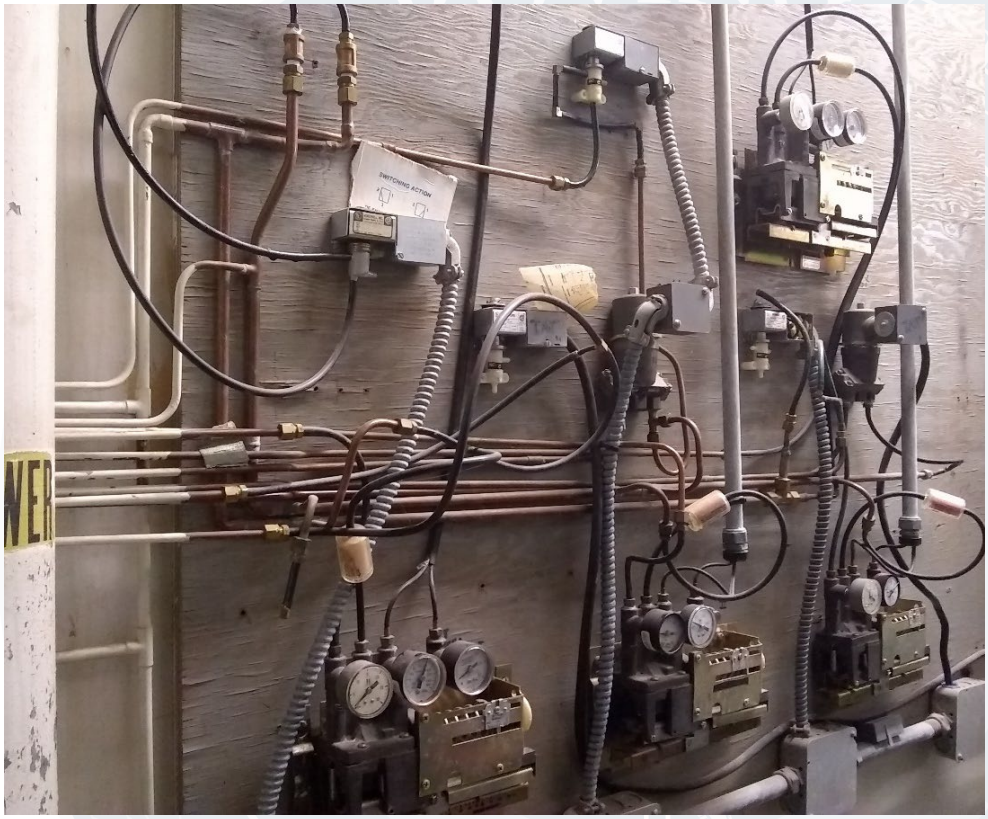


Figure 11: Semon Hall Deferred Maintenance – Obsolete HVAC Pneumatic Controls on Obsolete Air Handler



Figure 12 (right): Semon Hall Deferred Maintenance – Obsolete / Deteriorated Air Handler Cabinet





Figure 13 (left): Semon Hall Deferred Maintenance – Obsolete HVAC Air Handler

5.3 Additional Graphics

Project renderings and illustrative graphics are provided in *Appendix D (Project Renderings, Diagram and Sketch)* and include: 1) the building exterior; 2) building interior view of dental operatories; 3) a programmatic diagram of the revitalized facility; and 4) a programmatic sketch highlighting Dental Hygiene and Dental Therapy.

6. Appendix Document List

Appendix A: DAS Bond Forms 107BF11a and 107BF12

Appendix B: HECC Capital Project Cost Summary Form

Appendix C: Verification Letter – Life Safety, Security and Loss of Use

Appendix D: Project Renderings, Diagram and Sketch

Appendix E: Abbreviations Glossary

7. Executive Summary of the Proposed Project

7.1 Brief Description of the Project

The Oregon Tech Semon Hall Revitalization Project at the main campus in Klamath Falls is a capital renewal investment that repurposes and modernizes an existing E&G facility identified in the January 2024 Facilities Master Plan as having a FCI rating of "Poor." The Project includes a comprehensive revitalization of Semon Hall and a limited approximately 13,500 gross square feet addition to address space constraints, code compliance and functional deficiencies while prioritizing renewal over new construction in alignment with the SCDP.[1] The renovated facility will support Dental Hygiene, Doctor of Physical Therapy, and Marriage and Family Therapy programs, as well as the future Dental Therapy program all which prepare graduates for licensed practice in high-demand healthcare and allied health fields, particularly in rural and underserved regions of Oregon. The Project advances the HECC Equity Lens by delivering full ADA and universal design compliance, removing systemic barriers to participation in laboratory and clinical-based instruction and supporting equitable access to education and community facing clinical services. Infrastructure upgrades include replacement of major building systems, seismic improvements, building envelope renewal and integration with Oregon Tech's campus geothermal utility system for building heating and heated pedestrian walkways, improving life safety, security, energy efficiency and operational reliability while reducing long-term operating and maintenance costs. The Project leverages state bond funding, on-hand institutional matching funds held in a Board designated quasi-endowment and private support through a targeted Oregon Tech Foundation capital campaign, demonstrating shared public-private investment and multiparty collaboration in statewide workforce, equity and stewardship priorities.

7.2 HECC Equity Lens and Oregon Strategic Roadmap

As one of seven public universities, Oregon Tech is committed to the community it serves, evidenced by establishing Community as one of the four Pillars of the university's Strategic Plan. For more details, please see *Section III. Project Summary, Section 7.3. (Critical Institutional Need)*. Oregon Tech has prioritized Governor Kotek's priority related to behavioral health, "Every Oregonian should have access to healthcare, including behavioral health services and supports – no matter where they live or what they can afford".[2] Additionally, the 2025 Oregon Behavioral

[2] Office of the Governor Priorities (2026)

Health Talent Assessment Report emphasized that "Oregon is in the midst of a staffing crisis…critical shortage of mental health providers in Oregon's rural and frontier counties, with 32 of 36 lacking even one provider per 1,000 residents" (page 6).[3] It should be noted that according to the Report, one of the behavioral health roles involving the most transferable skills is licensed Marriage and Family Therapists which have not encountered a net decrease in wages unlike other behavioral health professionals.

The HECC was established in 2011 and has most recently developed its Strategic Plan 4.0 (2024-2029)[4] with a vision of "a future where all people benefit from the economic, civic, and cultural impact of high-quality postsecondary education, training, and workforce development" (page 7).

Supporting HECC's Equity Lens

Fundamental to the HECC's vision is equity. Equity is such a vital tenant that Oregon has developed an Equity Lens[5] to serve as a key basis in education funding and policy.

> *I have seen first-hand the student base and their impact on our community. We are proud of the services that they offer to many of the folks that cannot attain them in other capacities. The physical improvement for those utilizing the services* ***is key to raising our lower health metrics*** *for rural Oregon.*
>
> ***- Mike Angeli,***
> *City Councilman*
> *Klamath Falls, OR*

Serving underserved populations – The allied health programs at Oregon Tech support local and surrounding underserved communities, aligning with the HECC Equity Lens tenet: "We believe that our community colleges, university, and workforce training systems have a critical role in serving our communities of color, learners experiencing poverty, and other underserved populations."[5] (page 4)

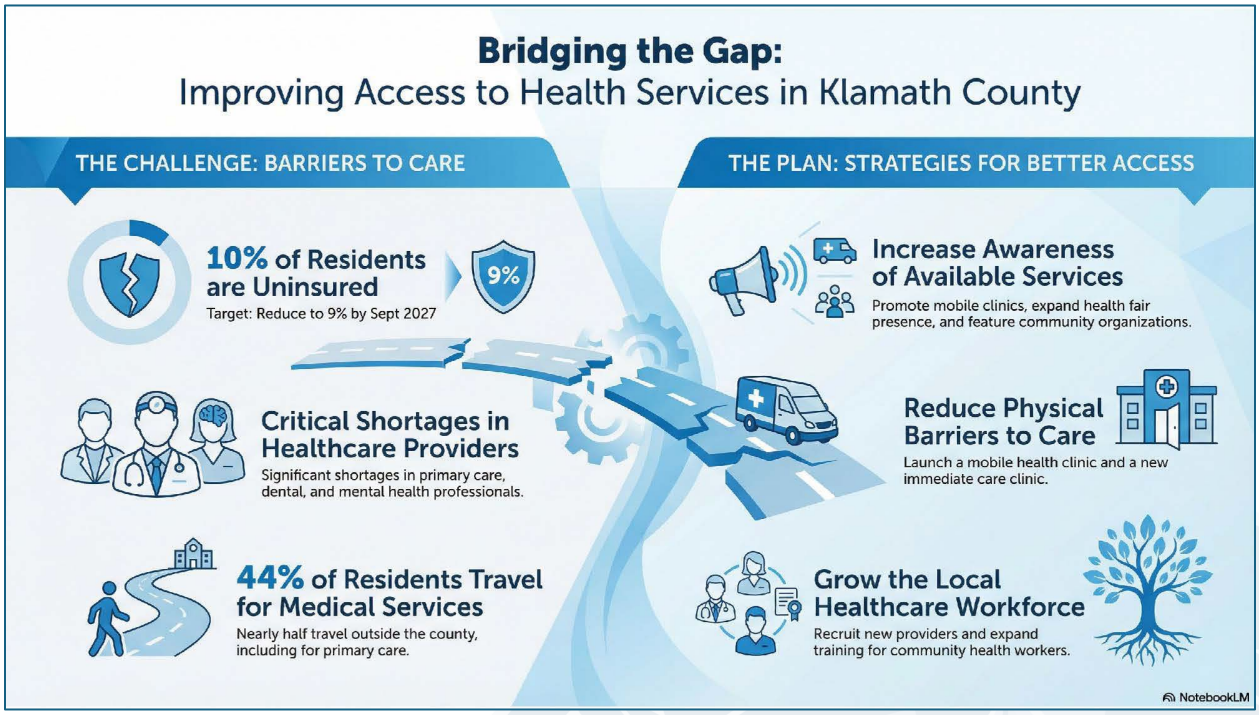
The allied health programs that will utilize revitalized space in Semon Hall (Dental Hygiene, Dental Therapy, Doctor of Physical Therapy, and Marriage and Family Therapy) serve the local and regional communities of underserved populations in rural southern Oregon. Underserved population accessibility refers to those "...that do not have adequate access to medical care. This includes rural, elderly, low-literacy, blue collar, and poor populations".[6] Klamath County is designated by the Oregon Office of Rural Health as a rural area (located ten or more miles from the centroid of a population center of 40,000 people).[7]

Rural areas tend to demonstrate higher rates of poverty than their urban counterparts and Klamath County is no different. According to the 2024 U.S. Census Bureau[8], Klamath County poverty rates exceed those of both state and national populations, with 17 percent of Klamath

[3] HECC. (2025). Oregon Behavioral Health Talent Assessment.
[4] HECC Strategic Plan 4.0 (2024-2029).
[5] HECC Equity Lens.
[6] U.S. Department of Health and Human Services. (2025). National Institute of Health.
[7] Oregon Office of Rural Health. (2026). Oregon Office of Rural Health Geographic Definitions.
[8] U.S. Census Bureau (2024). Klamath County.

County residents meeting the poverty threshold as compared to 12 percent for each of the state and national populations. Access to healthcare is another area in which rural communities struggle. In fact, in Klamath County's most recent County Health Improvement Plan (CHIP)[9], "Improving Access to Health Services" has been established as a goal for 2026-2027 (see Figure 14, below, taken from the 2025 CHIP).

Figure 14: Klamath County 2025 Health Improvement Plan Access Goal & Strategies[9]



Oregon Tech Dental Hygiene students work to improve access to care by providing dental cleanings and oral hygiene prevention information to rural and at-risk populations. Specifically, in 2025 Dental Hygiene students completed 639 encounters with community members including veterans and Oregon Health Plan subscribers (low-income population), providing close to $69,000 worth of treatment. Other at-risk populations that students supported included the homeless, special needs children, the elderly, incarcerated youth, low socioeconomic status families and migrant workers, providing an estimated additional $250,000 worth of services.[10]

This real-world approach will be expanded for each of the other allied programs (Dental Therapy, Doctor of Physical Therapy, and Marriage and Family Therapy) allowing students, faculty and community practitioners (serving in instructional roles) to offer services to rural and at-risk populations while gaining practical experience. By developing these hands-on laboratories, Oregon Tech will be able to improve the accessibility and availability of vital healthcare services to at-risk populations in rural Klamath County. For more details about these enhanced labs, please

[9] Healthy Klamath Network (2025). Klamath County Health Improvement Plan.
[10] Oregon Tech Dental Hygiene Departmental Report (2026).

see *Section V. Strategic Capital Development Priorities, Section 1.1. (Proposal Increases the Capacity and Effectiveness of Instructional Space)*.

Breaking the Cycle of Poverty – By enrolling in allied health programs at Oregon Tech, students are investing in their future, aligning with the HECC Equity Lens assertion that:

> "We believe every learner should have access to a full range of education and training options beyond high school, including apprenticeships, career certificates and college degrees. These will show them multiple paths to employment yielding family-wage incomes without diminishing the responsibility to ensure that each learner is prepared with the requisite skills to make choices for their future."[5] (page 4).

The student population of Oregon Tech's Klamath Falls campus (based on the Fall 2025 fourth week data) is comprised of 73 percent of students from Oregon. The robust selection of allied health majors include: applied behavior analysis, applied psychology, dental hygiene, diagnostic medical sonography, echocardiography, healthcare management, health informatics, marriage and family therapy, nuclear medicine molecular imaging, physical therapy, population health management, radiologic sciences, respiratory care and vascular technology. With this large variety of healthcare options (including additional allied health majors at the Portland-Metro campus and OSHU Nursing major available on the Klamath Falls campus) Oregon Tech offers learners in Oregon multiple paths to employment that guarantee family-wage incomes in hopes of breaking the cycle of generational poverty.

Not only is Oregon Tech located in an economically depressed region (as discussed above), but the students have also often experienced poverty themselves. The most recent data from the HECC Public University Dashboard (2024)[11] confirms that 65 percent of Oregon Tech students receive Pell Grants, which are awarded to only those applicants who meet the poverty threshold. These "learners experiencing poverty", as noted in the HECC Equity Lens, are at great risk for perpetuating the cycle of poverty in their counties of origin.

However, graduating from Oregon Tech significantly lowers this risk, as the median 5-year earning income of Oregon Tech alumni with rural counties of origin is $58,000, with their 10-year median earning income being $81,000; this surpasses even that of the state for rural graduates across the same 10-year post-graduation period ($68,000).[11] Allied health students are poised to fare even more favorably than the general student population, given the nature of their future careers. For instance, according to the U.S. Bureau of

> *Oregon Tech provides the opportunity for students from rural areas of the state to enter the workforce right out of college with sustainable wages that have the potential to* ***break the cycle of poverty*** *so often found in rural communities. Programs like Dental Hygiene and Marriage and Family Therapy help supplement the workforce shortage in these fields as the students gain real-world experience.*
>
> ***- Emily McEntire,***
> *Oregon Representative*

[11] HECC Public University Dashboard. (2026).

Labor Statistics Occupational Outlook Handbook,[12] the 2024 median annual pay for Dental Hygienists is $94,260, Marriage and Family Therapists is $63,780, and Physical Therapists is $101,020. Due to Dental Therapy being a new profession, it is not yet in the Handbook.

Admission to Oregon Tech strengthens the likelihood that students who come from rural areas will be able to significantly improve their employment path and associated income trajectory well above what was available to them upon graduation from high school. The Semon Hall Revitalization Project supports allied health student success and engagement by providing improved opportunities for hands-on, real-world experiences in the newly established Active Learning Laboratories (A+ Labs). Real-world experiences are required by programmatic accrediting bodies and the inclusion of A+ Labs is imperative for these allied health programs. For more information on programmatic accreditation, please see *Section III. Project Summary, Section 7.3. (Critical Institutional Need).*

Supporting the Strategic Roadmap

Transforming and Innovating Programs - HECC's Strategic Roadmap: Oregon Post Secondary Education and Workforce Training (2021)[13] calls for action to:

> "Transform and innovate to serve students and learners best—Support education and training institutions in continuing to transform, expand, and redesign their outreach and delivery models to engage today's learners." (page 5)

By revitalizing Semon Hall to strategically include allied health experiential learning in one building, Oregon Tech is transforming these programs by developing new and much needed programs (Dental Therapy), expanding current programs (Dental Hygiene, Doctor of Physical Therapy, and Marriage and Family Therapy) and ultimately transforming the educational space to engage today's learners by supporting educational innovations for employability by simulating today's healthcare settings. In addition, Oregon Tech is establishing a learning community in a welcoming student-centered environment, as detailed in *Section V. Strategic Capital Development Priorities, Section 3.2. (Supporting Innovation with Industry Partners)*,that will foster interprofessional learning, service opportunities and research initiatives.

Focus on Current and Future State Needs – HECC's Strategic Roadmap[13] also encourages universities to tailor programming to address existing and future needs:

> "Center higher education and workforce training capacity on current and future state needs—Focus postsecondary education and training resources to serve Oregonians where they are and who they are, with a priority on communities and populations that have been historically underserved."[13] (page 5)

Oregon Tech's robust offerings of allied health majors are strategically focused on meeting one of Oregon's most pressing workforce needs – more healthcare professionals. Not only do these majors produce more healthcare workers for the region, the Project's enhanced laboratories also

[12] U.S. Bureau of Labor (2026). Occupational Outlook Handbook.
[13] HECC (2021). Strategic Roadmap: Oregon Postsecondary Education and Workforce Training.

provide much needed services to underserved populations, as discussed above. With the revitalization of Semon Hall, Oregon Tech can offer new and expanded programs to better meet this call to action. For more details on how Oregon Tech is meeting workforce needs, please see *Section V. Strategic Capital Development Priorities, Section 1.2 (Addressing Workforce Needs)*.

> *The Career and Technical Education center for healthcare disciplines serves students across all of Klamath County's high schools, providing dual-credit opportunities to build skills, explore healthcare career pathways and gain valuable observational experiences.*
> *Together, we are working to end generational poverty in our region and expand access to living wage healthcare career opportunities by* ***beginning the career pathway in high school,*** *improving attendance, graduation rates and matriculation into higher education pathways at Oregon Tech.*
>
> ***- Brian Fix,***
> *Vice President & Chief HRO*
> *Sky Lakes Medical Center*
> *Klamath Falls, OR*

Oregon Tech coordinates with K-12 institutions to ensure college opportunities are delivered and career pathways established. In Fall of 2025, Sky Lakes Medical Center, in partnership with Oregon Tech, Klamath City Schools, Klamath County School District and Klamath Community College launched the Klamath Regional Career and Technical Education (CTE) campus with the purpose of offering health-focused CTE courses open to all students throughout Klamath County.

The curriculum includes introductory courses, core courses, some of which are dual credit with Oregon Tech and Klamath Community College, and capstone courses which are taken usually in the senior year. Capstone courses are year-long lecture and laboratory courses promoting healthcare professions such as nursing assistants and community healthcare workers.

In addition, CTE students can apply for the Sky Lakes Ambassador Program, a 12-week paid program designed to introduce high school students to careers in healthcare while building essential workplace skills. The Klamath Regional CTE campus plans to develop dental hygiene and physical therapy capstones in 2027. Additionally, Sky Lakes plans to launch a behavioral health ambassador in 2028.

Supporting HECC's Strategic Plan

The HECC Equity Lens[5] and Oregon Strategic Roadmap[13] (discussed above) correlate to the goals found in the HECC Strategic Plan 2024-2029 specifically:

- Goal 1 - Relevance: Improve the responsiveness of Oregon's education and training systems to the goals and needs of learners, employers and communities, and
- Goal 2 - Alignment: Align Oregon's education and training systems to create straightforward pathways for learners.

Oregon Tech has the best interns I have ever worked with. I really appreciate the time and dedication you put into making sure the students are a good fit, and your students are always

so kind, caring, and professional.

- Margaret Grygiel,
Intern Supervisor
Klamath Basin Behavioral Health
Klamath Falls, OR

As identified above, the allied health programs that benefit from the revitalization of Semon Hall will foster equitable workforce outcomes, connect postsecondary education and training to the workforce, contribute to solving community healthcare problems and strengthen postsecondary education to employment transitions.

7.3 Critical Institutional Need

The Semon Hall Revitalization Project goes beyond meeting a critical need at the institutional and programmatic levels; it also enhances Oregon Tech's unique niche within public higher education throughout the state.

Oregon Tech's Niche in the Statewide Landscape

The SCDP recommends defining each university's role in the Oregon public higher education landscape to avoid "costly duplication of programs and facilities" (Recommendation 4).[1] Thus, each university is meant to occupy a distinct space in Oregon's public higher education, making its own contribution to the workforce and the state's populace overall.

In terms of Oregon Tech's role in this educational landscape, the institution is designated as "Oregon's Polytechnic University" by state statute, distinguishing it from the other public institutions. This polytechnic approach to education has resulted in thriving professional allied health programs, some of which have been in existence for over 50 years. In fact, Oregon Tech's Institutional Research has confirmed that close to half (48 percent) of graduates work in health-related fields.[14] Adding to Oregon Tech's distinctions are consistently high placement rates for graduates (95 percent employed within six months of graduation), as well as a high median starting salary for graduates ($70,000 annually).[11] Oregon Tech supplies the workforce with graduates who have experiential knowledge in their fields and are highly sought after by employers who recognize the inherent value of Oregon Tech alumni as employees.

Further, Oregon Tech maintains allied health programs with very little overlap among the other six Oregon public institutions. Dental Hygiene and Medical Imaging Technology (MIT) offer the only program Bachelor of Science degrees in the state among the public universities, while the Doctor of Physical Therapy (a joint program with Oregon Health Sciences University, (OHSU)) is one of only two DPT degrees among public institutions. The Master's degree in Marriage and Family Therapy is one of three public programs in Oregon, and represents the only program located in a rural environment (as opposed to two others in urban centers, Portland and Eugene). Finally, the anticipated Dental Therapy Bachelor's program will be the first of its kind in Oregon and only one of four across the country.

[14] Oregon Tech Institutional Research. (2025).

Oregon Tech continues to fulfill a key and distinct role in the Oregon public higher education landscape, enhancing the healthcare field and meeting critical workforce needs without overlapping with other public university efforts.

University Critical Need: Institutional and Programmatic

Institutional Critical Need - In terms of Oregon Tech's mission, a clear directive to provide allied health education resulting in state-wide impact has been established (see emphasized language below in the university's Mission Statement):

> "Oregon Institute of Technology (Oregon Tech), Oregon's public polytechnic university, offers innovative, **professionally-focused** undergraduate and graduate degree programs in the areas of engineering, **health**, business, technology, and applied arts and sciences. To foster student and graduate success, the university provides a **hands-on**, project-based learning environment and emphasizes innovation, scholarship and applied research. With a commitment to diversity and leadership development, Oregon Tech offers statewide educational opportunities and technical expertise to **meet current and emerging needs** of Oregonians as well as other national and international constituents."

The Project is critical to modernizing the learning environment for students, which will better equip the institution to fulfill its Mission to create *professionally-focused health programs utilizing a hands-on approach to meet the current and emerging needs of Oregonians*. For more details about how Oregon Tech is addressing current and emerging needs of Oregonians, please refer to *Section V. Strategic Capital Development Priorities, Section 1.2. (Addressing Workforce Needs).*

Additionally, the Semon Hall Revitalization Project aligns with the current University Strategic Plan, enabling progress towards meeting institutional goals. The Strategic Plan is divided into four Pillars of Commitment, with supporting Goals and Objectives beneath each Pillar. The Semon Hall Revitalization Project aligns with all four Pillars, shown in Table 2 on the next page.

Table 2: University Strategic Plan Goals and Objectives Supported by Semon Hall Revitalization

Pillar I: Commitment to Student Success	Pillar II: Commitment to Innovation	Pillar III: Commitment to Community	Pillar IV: Commitment to Institutional Excellence
Goal 2: Ensure degree-seeking students who graduate are ready for success. Objective 2.2: Create a framework to equip students with professional and life skills.	Goal 4: Incorporate an innovative mindset into teaching, earning, applied research, scholarship, facilities, and processes. Objective 4.2: Create both physical and intellectual space for discovery, engagement, and creative activities among students, faculty, staff, and alumni.	Goal 7: Establish a valued presence locally, statewide, and nationally. Objective 7.1: Intentionally cultivate and strengthen university community ties with local, state, tribal, and federal stakeholders for the betterment of Oregonians and Oregon Tech.	Goal 10: Create a distinctive edge for Oregon Tech and embrace a culture of excellence and continuous improvement. Objective 10.2: Secure consistent and significant investment in systems, technology, and teaching facilities to advance program excellence and student success.

Utilizing language from Oregon Tech's Strategic Plan, the revitalization of Semon Hall will:

- Enhance allied health students' professional skills (Objective 2.2);
- Modernize physical and intellectual space to support student engagement (Objective 4.2);
- Strengthen community ties, resulting in the betterment of Oregonians (Objective 7.1); and
- Significantly invest in technology and teaching facilities to advance program excellence and student success (Objective 10.2).

Implementing the Semon Hall Revitalization Project will meet a critical need for the institution by advancing progress towards university priorities, objectives and goals.

Program Critical Need – In addition, the Project strengthens existing and future accreditation processes for the allied health programs which will primarily utilize Semon Hall. Accreditation is particularly critical for allied health programs; this process provides quality assurance for potential applicants as well as industry partners, ensuring that the program meets requirements within each field, maintains a relevant curriculum and remains competitive with similar programs. Accreditation also ensures graduates are qualified to enter the workforce with the skills necessary to seek licensure or other professional credentialling, which is key to maintaining a skilled

healthcare workforce. In fact, most fields, such as Dental Hygiene, require graduation from an accredited program in order to be eligible for licensure or certification. Accredited programs are more likely to attract higher performing students who are, in turn, more likely to be retained throughout their academic endeavors. Accreditation is critical to maintaining robust enrollment and retention rates for the university among the allied health programs, which is a crucial component of financial stability for Oregon Tech.

> *For community members, programming on campus **reduces barriers** to evidence-based prevention services while positioning the university as an active, welcoming partner in community health. These services create a centralized, trusted location for prevention, rehabilitation, and wellness for individuals who may not otherwise have access.*
> *This level of integration strengthens rural workforce development and retention by preparing graduates who are deeply connected to the community and more likely to remain and practice in the region, reinforcing Oregon Tech's commitment to community-centered health.*
>
> ***- Anne Davenport,***
> *Instructor, DPT Program Chair,*
> *Oregon Falls Prevention Coalition*
> *Klamath Falls, OR*

Of the four allied health programs that will primarily utilize academic space in Semon Hall, one is fully accredited, one has Provisional Accreditation and two will be seeking accreditation in the future. Specifically, Dental Hygiene has achieved full accreditation through the Commission on Dental Accreditation (CODA), while the Doctor of Physical program has received Provisional Accreditation through the Commission on Accreditation in Physical Therapy Education (CAPTE). Marriage and Family Therapy will seek accreditation through the Commission on Accreditation for Marriage and Family Therapy Education (COAMFTE), while the anticipated Dental Therapy program will seek accreditation through CODA.

Although each accrediting body has established requirements that are specific to their field, one commonality is the expectation that all allied health students gain personal experience applying their knowledge and skills. The Semon Hall Revitalization Project will enhance students' abilities to engage in hands-on experiences, strengthening accreditation renewals and applications. As an example, CAPTE has established minimum hours for Integrated Clinical Experiences (ICE) for Doctoral Physical Therapy programs. Currently, Oregon Tech DPT students must complete these ICE requirements in off-campus settings as there is no appropriate space on campus to do so. The Project will provide an area with appropriate flooring and equipment for ICE activities on-campus and will provide greater ease of ICE completion for students while strengthening relationships with community partners, another accreditation standard.

The Semon Hall Revitalization Project will strengthen accreditation efforts for the allied health programs, and in turn will increase the quality of applicants for each cohort and improve student retention, leading to financial stability across the programs, strengthening the university as a whole. During a period in which national enrollment trends are declining and a great deal of financial uncertainty exists at federal and state levels, Oregon Tech has prioritized strategies focused on increasing enrollment and retention; revitalizing Semon Hall is a critical aspect of these efforts.

IV. BUSINESS PLAN

1. Operations Overview

Financial Plan

The financial plan for programs housed in the revitalized Semon Hall facility is based on controlled cohort growth, accreditation-aligned staffing and prudent use of institutional resources. The Semon Hall Revitalization Project is necessary to enable any program growth, as the Dental Hygiene, Doctor of Physical Therapy, and Marriage and Family Therapy programs are currently unable to increase cohort size, and the Dental Therapy program cannot be established, due to existing space constraints.

Modernized instructional and laboratory space provided through the Project enables measured enrollment growth across four programs, including a 20 percent increase in Dental Hygiene cohort capacity; establishment of the new Dental Therapy program; 71 percent increase in Doctor of Physical Therapy cohort capacity; and 100 percent cohort capacity increase in Marriage and Family Therapy. These changes result in increased tuition and fee revenues as cohorts expand to full capacity. Enrollment growth is phased and aligned with space made available through the Semon Hall Revitalization Project and accreditation requirements, ensuring that revenue increases are realized only as program capacity is brought online through the revitalized facility.

New operating expenses associated with the Project are limited and program-specific, primarily related to faculty hiring required to meet accreditation standards as cohorts grow. Staffing increases are not immediate or universal across all programs; rather, faculty positions are added incrementally and only where required to support controlled cohort growth or to establish new programs, such as Dental Therapy. This approach avoids front-loading operating costs and ensures that new expenses closely track enrollment growth and associated revenues.

During the initial ramp-up period, Oregon Tech will utilize existing institutional resources to support programs as cohorts are built out. Any short-term investments required to initiate program growth or meet accreditation thresholds are intentional, time-limited and recoverable through future tuition revenues once full cohort enrollment is achieved for these in-demand programs. This strategy reflects a return on investment model, in which modest upfront institutional support enables sustainable long-term revenue generation and workforce program delivery.

Overall, the financial plan demonstrates that the Semon Hall Revitalization Project supports financially sustainable program growth, minimizes new recurring obligations, and aligns academic expansion with available resources and accreditation requirements. The Project strengthens institutional revenue stability while advancing Oregon Tech's mission to deliver workforce-critical healthcare and allied health education in a fiscally responsible manner.

Net Additional Costs

Oregon Tech anticipates that the annual additional net costs associated with programs housed in the revitalized Semon Hall facility will be modest and manageable, and will be largely absorbed within existing institutional funding streams. The Project is primarily a capital renewal and

modernization effort, rather than the introduction of wholly new academic operations. Programs currently housed in Semon Hall will continue in the facility following revitalization with improved efficiency and capacity. Ongoing program staffing, instructional delivery, utilities and routine maintenance costs will be supported through a combination of existing E&G operating funds, tuition revenues and institutional resources dedicated to workforce critical healthcare and allied health programs.

Incremental operating costs associated with expanded or enhanced program delivery, particularly for the Dental Hygiene program and the future Dental Therapy program, are expected to be offset by enrollment stability and controlled growth, consistent with accreditation requirements and space constraints addressed by the Project. The modernization and reconfiguration of instructional, laboratory and clinical-learning spaces will allow programs to operate more efficiently without proportional increases in staffing or support costs, reducing the need for additional class sections, temporary space, or off-site clinical arrangements. As a result, the Project supports more efficient execution of existing programs, rather than creating significant new recurring cost obligations.

In addition, operational efficiencies associated with high performance building systems, geothermal integration and LEED Silver–targeted design are expected to mitigate utility and maintenance cost increases over time. These efficiencies help limit the net annual operating impact of the facility while supporting long-term program sustainability.

Any incremental net costs are consistent with Oregon Tech's capacity to support the revitalized facility without creating undue pressure on the university's operating budget.

Financial Efficiencies

The Semon Hall Revitalization Project achieves meaningful financial efficiencies by replacing an aging, high maintenance facility with modern, purpose-designed infrastructure that reduces lifecycle operating and maintenance costs while improving program delivery. Academic programs currently housed in Semon Hall will remain in the facility following renovation, but will operate more efficiently due to improved space configuration, modern building systems and enhanced environmental performance. These efficiencies reduce pressure on operating budgets while supporting the long-term delivery of workforce critical healthcare and allied health programs.

Operational savings will be realized through replacement of antiquated mechanical, electrical, plumbing and control systems that currently drive elevated energy use, frequent maintenance interventions and system downtime. New high efficiency HVAC systems with digital controls, modern electrical distribution, LED lighting, improved building envelope performance and advanced building automation will significantly reduce energy consumption and maintenance intensity. Integration with Oregon Tech's campus geothermal utility system for building heating and heated pedestrian walkways further lowers long-term heating costs, improves winter reliability and reduces reliance on conventional energy sources.

The Project also improves operational efficiency at the program level. Reconfigured instructional, laboratory and clinical spaces increase capacity and flexibility, allowing programs to operate more effectively without adding class sections or duplicating resources across multiple facilities. As

mentioned previously, colocation of clinical based programs within a modernized building reduces inefficiencies associated with dispersed operations, improves scheduling predictability and streamlines shared support services, supporting enrollment stability and controlled growth while avoiding incremental staffing and facility costs.

From a lifecycle perspective, the Project delivers a strong return on investment. Comprehensive renewal eliminates approximately $10.2 million in deferred maintenance, reducing future capital exposure and avoiding continued investment in obsolete systems. During the initial years of operation, when major systems are under warranty, Facilities and CIR resources can be redirected to other high priority needs across the university's portfolio. As a project targeted for LEED Silver certification, additional efficiencies are expected through reduced energy, water and maintenance costs, and improved indoor environmental quality, contributing to a healthier and more reliable instructional and clinical environment.

Within this context, the Project includes a limited building addition that exceeds ten percent of Semon Hall's existing square footage, reflecting the specialized requirements of clinical based instruction rather than discretionary expansion. Square footage beyond the ten percent threshold is necessary to meet accessibility and accreditation standards, support clinical layouts that model authentic practice environments, establish the new Dental Therapy Program, and sustain the Dental Hygiene program, for which comparable space does not exist elsewhere on campus. Absent this modest expansion, the facility would face increased risk of loss of use, placing program continuity, enrollment stability and long-term operational sustainability at risk.

2. Revenue Sources, Fundraising and Partnerships

Fundraising Campaign

The Semon Hall Revitalization Project will be funded through a combination of state bond funding and institutional matching funds. Institutional matching funds of $2,700,000 are on hand and designated within the Board of Trustees' quasi-endowment, supported by proceeds from prior asset sales and other institutional resources reserved for strategic capital investments.

In parallel with the state funding request, the Oregon Tech Foundation will pursue a targeted capital campaign in support of the Semon Hall Revitalization Project, with a fundraising goal of approximating the university's institutional matching funds, to offset university expenses and reduce reliance on state bond proceeds. The campaign is expected to focus on Project-specific philanthropic support aligned with healthcare workforce development, student access and facility renewal priorities, consistent with institutional advancement practices. Philanthropic interest in the Project is closely aligned with its ability to sustain and expand cohort capacity in workforce-critical healthcare and allied health programs.

All fundraising activities will be conducted in compliance with state requirements and IRS regulations governing tax-exempt bond financed facilities, including restrictions on private use. Campaign commitments are expected to be secured prior to bond issuance, currently anticipated in 2029, consistent with institutional practice for major capital projects.

Ongoing operating costs for the revitalized facility will be supported through institutional operating revenues, including revenues associated with student recruitment, retention and program delivery. Lifecycle maintenance and renewal of the facility will be supported through institutional operating funds, state funded CIR resources and the university funded project set aside account established for the revitalized Semon Hall facility, consistent with HECC guidance and the university's stewardship framework.

Revenue Sources

The ongoing operating costs of the facility will be funded by revenue resulting from increased student enrollment in the four health-focused programs: Dental Hygiene, 20% cohort growth; Dental Therapy (new); Doctor of Physical Therapy, 71% cohort growth; and Marriage and Family Therapy, 100% cohort growth. Program enrollment, including cohort growth, contributes to an overall financially sustainable model. Life cycle maintenance and renewal of the facility will be supported through a combination of funding sources, as part of the stewardship model, including from institutional operating funds and the project set aside account.

3. Review of Alternatives

Oregon Tech evaluated multiple alternatives during development of the Semon Hall Revitalization Project, including partial renovation, phased renovation and construction of a new stand-alone facility. Each alternative was assessed based on cost effectiveness, operational efficiency, program continuity, accreditation risk and alignment with institutional and statewide capital priorities.

Partial and phased renovation approaches were determined to be insufficient to address the full scope of programmatic needs while maintaining continuity of instruction and clinical training. These approaches would result in significant, extended disruption to the Dental Hygiene program and would not provide the appropriately configured instructional and laboratory space required to support accreditation aligned program delivery.

Construction of a new facility was also evaluated and determined to be less cost-effective than comprehensive renewal of an existing asset. New construction would not align with the HECC SCDP's emphasis on capital renewal over new construction and would require additional investment while leaving an existing, mission critical facility unresolved.

Based on this analysis, Oregon Tech concluded that comprehensive renovation with a modest addition represents the most effective and fiscally responsible approach. The addition is necessary to maintain continuity of the Dental Hygiene program during construction, as no comparable space exists on campus or within the region to temporarily relocate specialized laboratories and clinical infrastructure without risking accreditation and enrollment disruption. Semon Hall's central location and durable structural framework support reinvestment, allowing the university to preserve and modernize a critical academic facility while sustaining accredited program delivery and meeting long-term institutional needs. Failure to maintain program continuity during construction would place accredited programs at risk of enrollment disruption or loss of use, underscoring the need for the selected approach.

V. STRATEGIC CAPITAL DEVELOPMENT PRIORITIES

1. Space Renewal, Workforce, or Completion Priorities

1.1. Proposal Increases the Capacity and Effectiveness of Instructional Space

The Semon Hall Revitalization Project is estimated to increase academic space (as defined in SCDP[1], page 10) by approximately 69.0 percent. This increase will allow for: 1) an expansion and modernization of the Dental Hygiene instructional and simulation areas; 2) addition of the new Dental Therapy program utilizing shared instructional and simulation space with Dental Hygiene; 3) development of a student laboratory for the Doctor of Physical Therapy Program; and 4) development of a hands-on experience and teaching environment for Marriage and Family Therapy, all known as A+ Labs.

Active Learning Laboratories (A+ Labs)

As the SCDP found, and is still true today, "There are statewide occupational needs in Health and STEM-related fields. The project team's analysis suggests there is room to grow enrollment in programs that help to fill these occupational demands, as Oregon produces relatively few graduates in relationship to numbers of employees in STEM and health care fields, and therefore would appear to be reliant on importation to get those workers" (page 6).[1] Additional instructional space will allow for better pedagogical practice (in Dental Hygiene, described further below), enrollment growth (in Marriage and Family Therapy) and development of new programs (Dental Therapy).

The Oregon Tech Marriage and Family Therapy students we host in practicum consistently demonstrate exceptional clinical preparedness and a strong commitment to quality client care. Their proactive approach and foundational strengths make them a ***valuable asset to our team and the community they serve.***

- Tessa Saindon,
CEO, Connect, Thrive, Restore, Counseling Group
Klamath Falls, OR

The increase in capacity of instructional space is in the expansion and development of Active Learning Laboratories ("A+ Labs", for short). A+ Laboratories: 1) immerse students in hands-on, practice-based environments, simulating authentic healthcare settings; 2) allow learners to practice technical skills, clinical reasoning and interprofessional communication with community members in a high-support environment; 3) integrate technology, simulation and experiential learning; and 4) help students build confidence, competence and professional identity. The A+ Laboratories will strengthen community health by providing the opportunity for students to obtain their required clinical hours, working with real-world patients offering free or affordable low-cost (sliding scale) services to underserved populations.

Because community members will be coming to campus to participate in the A+ Labs, construction of a new ADA-parking lot adjacent to Semon Hall is included in the project scope. Community members, many of whom are elderly, currently must park on the perimeter of campus and walk

a significant distance often with stairs to reach Semon Hall. For new patients this can cause angst in navigating campus and locating suitable parking, causing unnecessary strain. Installing an ADA compliant parking area adjacent to the renovated Semon Hall will increase ease of access for community members, students and industry partners alike.

Program-Specific Need

The increase in instructional space is critical for the Dental Hygiene program due to an extreme pressure point. The SCDP noted that "… continued growth in academic programs such as Engineering, Computer Science (including IT and data analytics) and Health Care, may cause pressure points in these colleges"[1] (page 10). The Dental Hygiene program has endured a limited instructional space for the last few decades and has found innovative solutions to overcome many limitations. However, the current space, which has not had a major renovation since the building was built in 1964, limits expansion of the program. Current space serves multiple purposes, well beyond the intent of the original space design, often with multiple cohorts of students and patients in the same space at the same time. To simulate the current dental hygiene workplace and newer teaching methods, which is fundamental to the mission of a polytechnic institution, the program must have additional dedicated instructional and lab space. This additional space will reduce the pressure point, allow for an increase in accommodating underserved populations and provide the opportunity for increased cohort sizes.

Dental Therapy is a new profession that has emerged and Oregon Tech is uniquely positioned to expand into dental therapy because the need, infrastructure and education mission alignment are already in place. By developing a Dental Therapy program, Oregon Tech will be able to address challenges in rural oral health care such as provider shortages, limited access to preventive and restorative services and long travel distances for patients. After investigating the limited number of Dental Therapy programs in the U.S., it is estimated the program would start with a cohort of eight students with plans to increase student enrollment in future years.

The Marriage and Family Therapy (MFT) program is a Master's degree program that was developed 10 years ago, in 2016. Students are successful in completing the program and finding employment. However, enrollment has been limited for several reasons including lack of student practicum sites, programmatic accreditation and faculty members due to the severe shortage of mental health providers in Oregon. Innovative academic leaders at Oregon Tech and the College of Health, Arts, and Sciences are committed to addressing these insufficiencies. The MFT program is currently exploring the programmatic accreditation process, which will require the hiring of additional faculty members. By the Fall of 2026, the MFT Program is expected to start the accreditation process, with the College's full support. In order to overcome the lack of sufficient locally practicum sites, Oregon Tech will need to create a mechanism through which students can obtain clinical hours; hence the A+ Lab. Programmatic accreditation validates that the MFT program at Oregon Tech meets rigorous professional standards and will also increase student enrollment. All these factors go hand in hand, and the commitment has been made to increase student enrollment in this program to help address the dire need for mental health providers in rural Oregon.

The Doctor of Physical Therapy (DPT) program accepted its first cohort of students in June of 2023 and is a joint program with OHSU. The DPT program is currently accredited under the category of candidacy and is seeking full accreditation which it should receive later in 2026. The program currently faces unmet space needs and will require dedicated lab space for students to interact with varied patient populations to meet on-going accreditation standards.

Academic Space Surplus or Deficit

The Semon Hall Revitalization Project addresses a clear deficit in effective academic instructional space, as defined in the SCDP[1]. While the SCDP notes that statewide academic space capacity is generally sufficient, it emphasizes that functional deficits arise when existing space is outdated, inflexible, or unable to support modern pedagogy and accreditation driven instruction. Semon Hall reflects this condition. These limitations constrain instructional delivery and cap cohort sizes across multiple programs; the Semon Hall Revitalization Project is therefore necessary to enable program growth and establishment of the new Dental Therapy program. The revitalized instructional space resolves these constraints, enabling controlled cohort growth in workforce-critical programs housed in Semon Hall.

Semon Hall is one of the most heavily utilized academic buildings on Oregon Tech's Klamath Falls campus with workforce critical healthcare and allied health programs. Program cohort sizes for Dental Hygiene, Doctor of Physical Therapy, and Marriage and Family Therapy are capped due to space limitations, including inadequate classroom, laboratory and laboratory training configurations. These constraints limit instructional capacity despite high utilization and demonstrated student demand, resulting in a functional deficit of academic space rather than a surplus. Current cohort sizes in programs housed in Semon Hall are space-bound and the Project removes these constraints by providing right-sized, code-compliant instructional and laboratory space necessary to support additional cohort capacity.

The Semon Hall Revitalization Project resolves this deficit by renewing and reconfiguring existing instructional space to increase capacity and effectiveness, consistent with SCDP priorities. As a direct result of the Project, Dental Hygiene, DPT and MFT cohort sizes will increase by 20 percent, 71 percent, and 100 percent, respectively, enabled by accreditation compliant laboratory and instructional layouts that cannot be achieved within the existing facility. In addition, the Dental Therapy program cannot be established without renewed space, as current Semon Hall conditions do not meet the accreditation and clinical training requirements necessary to support the program.

Through comprehensive renewal and targeted expansion limited to accreditation required space, the Project increases instructional capacity, supports controlled cohort growth and improves utilization of existing E&G space. This approach aligns with SCDP guidance to prioritize space quality, suitability and utilization efficiency over broad net-new construction, while directly addressing workforce critical academic space deficits.

Academic Support Space Surplus or Deficit

Additionally, the Semon Hall Revitalization Project addresses a deficit in appropriately configured academic support space, as defined in the SCDP. While the SCDP notes that statewide academic

support space is not uniformly deficient, it recognizes that functional deficits occur when existing support areas do not align with accreditation standards, accessibility requirements, or contemporary program delivery models.[1] Semon Hall reflects this condition.

Academic support spaces within Semon Hall include allied health program preparation and sterilization areas, materials and storage rooms, faculty supervision and consultation areas, shared instructional support rooms and student facing clinical reception and waiting areas. The spaces are undersized, fragmented, or distributed across nonadjacent locations. These conditions constrain instructional efficiency, complicate scheduling, and directly contribute to capped cohort sizes for Dental Hygiene, Doctor of Physical Therapy, and Marriage and Family Therapy and prevent implementation of the Dental Therapy program. Renewal and consolidation of academic support space enables controlled cohort growth and establishment of new programs by aligning facilities with accreditation and operational requirements.

The absence of dedicated, accreditation-aligned academic support space further prevents establishment of the Dental Therapy program, which requires specific support functions that cannot be accommodated within the existing facility.

The Semon Hall Revitalization Project resolves this deficit by renewing, consolidating and rightsizing academic support space within a single, purpose designed facility. The revitalized building will include centralized allied health support suites (e.g., materials handling and sterilization), dedicated simulation and skills laboratories, shared preparation and storage areas, and appropriately configured faculty supervision and student support spaces that serve multiple programs. By consolidating functions that are currently duplicated or dispersed, the Project improves adjacency, workflow efficiency and shared use while reducing operational inefficiencies. Academic support and shared instructional spaces are designed to scale appropriately with cohort size, ensuring that planned program growth can be supported without diminishing educational quality or student outcomes.

Consistent with SCDP guidance, this approach prioritizes space effectiveness and utilization efficiency rather than excess square footage. Modernized and consolidated academic support space enables accreditation compliance, supports increased instructional throughput and improves operational sustainability across multiple allied health programs, addressing a clear academic support space deficit without creating surplus capacity elsewhere in the campus portfolio.

1.2. Addressing Workforce Needs

The Semon Hall Revitalization Project will enable Oregon Tech to meet existing and future healthcare workforce needs by filling occupations which require an advanced degree; providing a real-world, applied experience for students; and meeting employment gaps at the bachelor and above degree level.

Advanced Degrees and Applied Experience

As noted in the Oregon Tech section of the SCDP, among the occupations that are expected to have a large number of annual openings are allied health professionals, many of which require

college degrees.[1] The Oregon Tech allied health programs that will primarily utilize Semon Hall (Dental Hygiene, Dental Therapy, Doctor of Physical Therapy, and Marriage and Family Therapy) each require an advanced degree in order to become eligible for field-specific licensure or career advancement. Specifically:

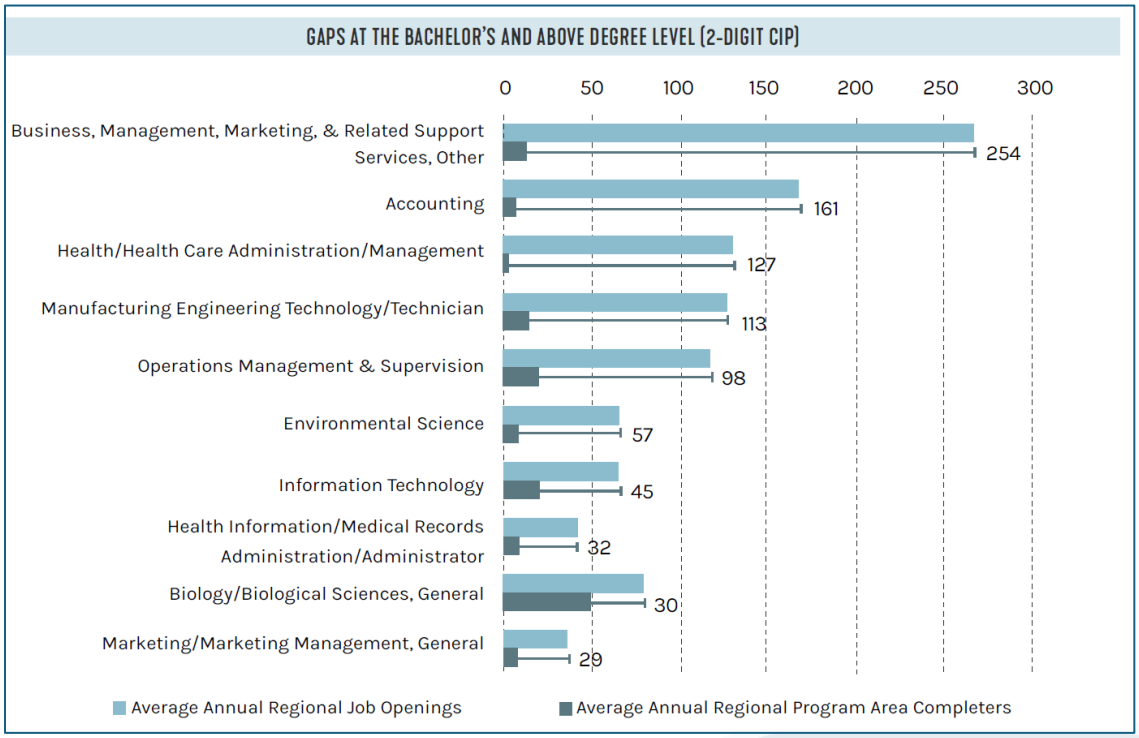
- In the absence of a Bachelor's degree or higher in Physical Therapy, career paths peak at Physical Therapist Assistant or Occupational Therapy Assistant, both achievable with an Associate's degree.
- Without attaining a Master's degree in a counseling field (such as Marriage and Family Therapy), students will be ineligible for licensure and are limited to more social service roles than therapy-focused careers.
- Although students can become a licensed dental hygienist with an Associate's degree, those that choose to move forward to the Bachelor's degree or higher have greater opportunity for career advancement, including among areas such as public health, management and education. Further, they have a higher earning potential than hygienists with only an Associate's degree, making the Bachelor's degree a strategic investment in their future.
- The Dental Therapy field is relatively new, with only four programs offering degrees across the country (American Dental Therapy Association, 2026); two offer Associate's degrees, one offers both Bachelor and Doctorate degrees, and the last offers a Master's degree.

One of the hallmarks of Oregon Tech's polytechnic curriculum is to include hands-on, experiential learning; this is true for all the allied health programs that will utilize the revitalized Semon Hall space. Engaging in real-world practice within the A+ Labs (described above) will serve as internship experiences for the students. For example, Master's students in the MFT program are required to complete 700 hours of practicum, with at least 300 of those hours designated as direct client contact. Working with real-world patients in the A+ Labs in Semon Hall will enable MFT students to accrue those hours and complete the practicum experience on-campus.

Meeting Employment Gaps

According to the Oregon Tech section of the SCDP, *Health/Healthcare Administration/Management* represented the third highest gap between Average Annual Job Openings and Average Annual Regional Program Area Completers within the Central Oregon region (see Figure 15, on the next page).[1] At the time, the SCDP noted that *Private Education and Health Services* was expected to demonstrate the second to largest growth between 2017 and 2027 (Figure 8, page 106).[1]

Figure 15: Gaps at the Bachelor's & Above Level (pg. 108)[1]



More recent data from the same data source utilized in the SCDP (the State of Oregon Employment Department)[15] confirms that Private Education and Health Services accounts for 17 percent of all employment in the Central Region "making it the second largest industry of employment". Further, the Employment Department notes:

> "From 2023 to 2024 alone, regional healthcare added jobs at a faster pace than any other major sector…mirroring the state where healthcare became one of the principal drivers of employment growth…By 2033, Central Oregon is expected to add another 2,190 healthcare and social assistance jobs, the most of any industry."[15]

The Employment Department also cautioned that "replacement needs dominate the future openings" given the accelerated expected rate of retirement, with thousands of positions needing to be filled to accommodate the loss.[15]

Despite the explosive growth within the healthcare workforce, there remain significant shortages across the state. Klamath County, for instance, is designated as a Health Provider Shortage Area (HPSA) for both Dental Health and Mental Health by the Health Resources and Services Administration as are the majority of rural areas.[16] Further, Klamath County (again, as is the case among many rural counties in Oregon) has higher population to provider ratios than the state average across many healthcare areas. For instance, in terms of Physical Therapists the population to provider ratio for the state is 1,413:1 while in Klamath County it is 1,869:1. The

[15] State of Oregon Employment Department. (September 24, 2025). Healthcare leads the way as growth slows.
[16] Health Resources and Services Administration. (2026). Health Provider Shortage Areas.

situation is even more dire with regards to Counselors and Therapists, with the local ratio being more than twice as high as the state average (3,717:1 as compared to 1,725:1).[17]

> *Rural communities across Oregon continue to struggle with shortages in the healthcare workforce, and it has become exceedingly difficult to recruit professionals to fill these openings. The allied health programs at Oregon Tech not only* ***stregthen the healthcare workforce*** *upon graduation, they supplement services in the area during their education and training.*
>
> ***- Jennifer Little,***
> *Director,*
> *Klamath County Public Health*
> *Klamath Falls, OR*

Similarly, the Oregon Areas of Unmet Health Care Need Report[18] scores and ranks 128 Oregon service areas based upon nine variables measuring primary, dental and mental health care availability, affordability and utilization; the lower the score, the greater the unmet need:

"For 2025, scores ranged from 23 (worst) to 78 (best), compared to last year, when they ranged from 21 to 78. East Klamath has had the lowest score for the past two years, eclipsing Warm Springs, which had the lowest score for the previous three years."[18]

Klamath County is demonstrating the most unmet need out of all service areas across the state of Oregon.

Given that job opportunities within the healthcare field in Central Oregon (and across the state) are accelerating at a rapid pace and there continue to be shortages among the workforce (particularly among rural areas such as Klamath County), it becomes even more crucial to close the gap between workforce demand and supply. The Semon Hall Revitalization Project will enable Oregon Tech allied health graduates to assist in closing that gap. In fact, according to the SCDP, in terms of Oregon Tech program completion rates (pg. 119), *Health Professions and Related Programs* represent the single largest category of completions for the university, totaling close to half of all completions each year from 2010 to 2017.[1] Additionally, *Health Professions and Related Programs* has shown consistent growth in completions across the seven-year period. By expanding program capacity in the Dental Hygiene program, launching the Dental Therapy program, and achieving accreditation for the Doctor of Physical Therapy, and Marriage and Family Therapy programs (thereby opening up the full number of cohort slots for each), Oregon Tech will be able to increase the number of healthcare professionals to enter the workforce and to better assist in meeting the employment gap across the state.

1.3. Bringing Industry to Campus

This Project brings industry members to campus to assist in an educational capacity. The proposed A+ Labs use local healthcare providers to assist in an instructional capacity. Currently, the Dental Hygiene program has one half-time dentist employed to provide care to underserved

[17] Oregon Health Authority. (2026). Oregon's Licensed Health Care Workforce
[18] Oregon Office of Rural Health. (September 2025) Oregon areas of unmet health care need report.

community members and instruct students. With the addition of a Dental Therapy Program, local dentists will be invited to campus to instruct students in a variety of specialized dental procedures.

The Marriage and Family Therapy program will hire local marriage and family therapists to assist in instructing/observing students in the A+ Labs. Even though Oregon Tech will hire additional faculty members, the number of observation hours is so many that it is common practice in the pedagogy of these students to have a number of adjunct faculty members to assist.

I enjoyed the positive attitude of all the students and teachers involved. This was a 'win-win' class. You said that you paired us so that the students could grow and learn, but also - This has been ***life changing for me.***

- Integrated Clinical Experience (ICE) Program participant

I really enjoyed participating in the Walk With Ease (ICE) program. Having the opportunity to work one-on-one with a patient and tailor their progression based on individual needs ***was incredibly rewarding.*** *It allowed me to grow both as a clinical reasoner and as a future physical therapist. I found this experience to be highly beneficial to my professional development.*

- DPT Current Student

The Doctor of Physical Therapy program currently sends faculty and students off campus to local clinics and sites to interact with specific patient populations through Integrated Clinical Experiences (ICE). These experiences which integrate students, faculty and local practitioners include: 1) Better Bones and Balance- offered at the Klamath Senior Center, 2) Walk with Ease- offered in partnership with Sky Lakes Medical Center, 3) Mini-Kickers- offered in partnership with the Klamath YMCA, 4) Social Gaming Club- offered in partnership with Tater Tots Pediatric Clinic. Once the DPT program has an A+ Lab in the renovated Semon Hall, these services will be transitioned on-campus to make it more convenient for patients and students. The DPT program will continue to employ local physical therapists for their expertise and assistance in the instruction of students within these laboratories.

By housing these A+ laboratories within a single building, Oregon Tech is creating a centralized hub for industry members to engage in ways that are currently limited. Colocating these spaces will bring students, healthcare professionals, faculty members and community members into consistent proximity fostering interprofessional instruction, research (discussed below in *Section V. Strategic Capital Development Priorities, Section 3.1. (Supporting Research with Industry Partners*), and community-engaged service. This will build upon existing collaborations, such as the interdisciplinary outreach at the local senior center in which the Dental Hygiene and Doctor of Physical Therapy programs address oral health alongside mobility and dexterity challenges. With industry partners embedded on campus, students gain exposure to real-world practice expectations, while partners benefit from access to potential employees.

2. Addressing Deferred Maintenance

Deferred Maintenance Reduction

The Semon Hall Revitalization Project directly addresses significant deferred maintenance in a high use E&G facility that has reached the point where comprehensive renewal is more cost effective than continued incremental repair. As documented in the 2024 Facilities Master Plan, Semon Hall is rated “Poor” based on its FCI, reflecting aging mechanical, electrical and plumbing systems; building envelope deficiencies; structural and seismic vulnerabilities; and accessibility limitations that collectively exceed the scope of routine maintenance.

As described above in *Section II. Institutional Capital Plan Information, Section 3.* (*Deferred Maintenance – Estimated Backlog)*, Oregon Tech employs a two-tiered strategy that combines targeted system level maintenance with full building renewal when systems reach obsolescence. This Project represents a targeted application of that strategy, removing a substantial deferred maintenance burden from a mission critical academic facility and enabling the university to reallocate limited CIR resources more effectively across the remaining campus portfolio.

The Project will comprehensively reduce deferred maintenance through full replacement of end-of-life mechanical, electrical and plumbing systems; remediation of deficiencies in the building envelope and interior infrastructure; correction of accessibility deficiencies to meet current standards; and implementation of required seismic upgrades. In total, the Project is expected to eliminate approximately $10.2 million in deferred maintenance associated with Semon Hall’s primary building systems, representing roughly 19 percent of the total project cost and delivering a substantial return on investment through a single, coordinated capital renewal effort.

Semon Hall, one of the earliest buildings constructed on the Klamath Falls campus, no longer meets current seismic resiliency, energy efficiency, or ADA accessibility standards. The facility exhibits deteriorating foundations, aging structural elements and widespread hazardous materials, including asbestos in flooring, ceilings, ductwork and exterior components, that pose operational, safety and financial risks if left unaddressed. Incremental repairs are no longer viable given the extent and interdependence of system failures. However, the building’s durable original structural framework and long clear span design make it well suited for comprehensive rehabilitation, allowing Oregon Tech to extend the facility’s useful life in a cost-effective manner consistent with recent successful renewal projects such as Boivin Hall. Please refer to *Section III. Project Summary, Section 5.2 (Additional Photos)* for photographic documentation of existing deferred maintenance conditions in Semon Hall.

Modernization of building systems is expected to yield measurable reductions in ongoing operating and maintenance costs, including energy, water and lifecycle maintenance savings. Replacement of antiquated electrical infrastructure, lighting systems, HVAC controls and single pane glazing with modern, high efficiency systems will improve reliability, indoor environmental quality and instructional functionality. During the initial years of operation, while systems remain under warranty, maintenance staff will be able to redirect effort and CIR resources to other facilities with significant deferred maintenance needs, accelerating progress in reducing the university’s overall deferred maintenance backlog.

Deferred Maintenance Account

To support long-term stewardship of this major investment, the Project establishes a university-funded capital set aside account for the revitalized Semon Hall facility. This account will be used to proactively address future systems renewal and capital reinvestment needs over the building's lifecycle, supplementing the university's preventive maintenance and CIR programs. Establishment of this dedicated account aligns with the HECC's guidance and reinforces Oregon Tech's commitment to responsible asset management, deferred maintenance risk reduction and sustainable use of state capital investments.

3. Supports the Research and Economic Development Capacity of the Institution

3.1 Supporting Research with Industry Partners

According to the SCDP[1], research benefits universities and their communities by increasing information transfer and promoting economic growth, while also attracting higher quality students and strengthening the reputation of higher education as a whole. The Semon Hall Revitalization Project will support the research and economic development capacity of Oregon Tech. The A+ Labs will bring together faculty members, local healthcare providers and students in a model that promotes collaborative research within and between their respective professions. The Dental Hygiene and Physical Therapy programs both have active research agendas. The Physical Therapy program, being a doctoral degree, already collaborates with local physical therapists in research projects, which is required by their accrediting body. Having access to the A+ Lab on campus will only expand research opportunities for students, faculty and these local industry partners. As their student enrollment grows, the number of additional local physical therapists and opportunities for future research collaborations will also expand. Similar research opportunities also exist for the Marriage and Family Therapy and anticipated Dental Therapy programs.

Interprofessional opportunities for research also exist in addition to those that are program-specific. For instance, the Dental Hygiene and the Applied Behavior Analysis programs collaborate on research with pediatric patients who display behavior challenges. The Applied Behavior Analysis students create behavior modification programming (reward systems) that Dental Hygiene students can implement when working with these patients. This is just one example of the interdisciplinary research that can occur between the allied health programs, which will only be enhanced once the clinics are in the same building. Oregon Tech anticipates an increase in scholarly activities and external grant funding given closer proximity following the Semon Hall Revitalization Project .

3.2 Supporting Innovation with Industry Partners

This Project supports innovation with industry partners by bringing industry members to the Klamath Falls campus to assist in the instruction of students as described above in *Section V. Strategic Capital Development Priorities, Section 1.3. (Bringing Industry to Campus)* and promoting interprofessional research opportunities as described in *Section V. Strategic Capital*

Oregon Tech's Dental Hygiene program was a natural partner for our Dental Assisting program. Located on our Salem campus, together, they ***strengthen the experiences*** *of students across both programs, to the benefit of our institutions and the communities that they serve.*

- Sandi Kellogg,
Dean of Health Sciences,
Chemeketa Community College,
Salem, OR

Development Priorities, Section 3.1. (Supporting Research with Industry Partners), innovations that could naturally emerge by bringing industry partners into these A+ laboratory settings include:

- provide continuing education to local healthcare professionals,
- pilot studies for new healthcare models,
- development of mobile clinics/services,
- rural health disparities projects,
- patient education outreach,
- local and international service opportunities, and
- interprofessional education activities.

Oregon Tech plans to optimize resources on campus to address community and workforce needs by providing more accessible and available healthcare services through A+ laboratories, increasing the number graduates in Dental Hygiene and Marriage and Family Therapy and launching a Dental Therapy program. For more information regarding how Oregon Tech plans to address community and workforce needs, please see *Section III. Project Summary, Section 7.2 (HECC Equity Lens and Oregon Strategic Roadmap*), and *Section V. Strategic Capital Development Priorities, Section 1.2. (Addressing Workforce Needs).*

4. Collaboration Between the Public Universities and Interested Parties

4.1. Collaborative Efforts

As mentioned in *Section III. Project Summary, Section 7.2. (HECC Equity Lens and Oregon Strategic Roadmap),* Oregon Tech is in a partnership with Sky Lakes Medical Center, Klamath City Schools, Klamath County School District and Klamath Community College to offer curriculum and career pathways for students attending the Klamath Regional CTE campus. The Klamath Regional CTE campus launched with some course offerings in the fall of 2025 and has plans to continue expanding each year through 2030, that will serve as a pipeline directly into Oregon Tech's allied health and behavioral programs housed in Semon Hall.

4.2. Public Service Entities

Public service entities could include but are not limited to public universities, community colleges, public school districts, regional consortiums, or private institutions; please see *Section V. Strategic Capital Development Priorities, Section 4.1 (Collaborative Efforts)*.

VI: OPERATIONAL SAVINGS AND SUSTAINABILITY

Cost Savings Generated by Operational Efficiency

The Semon Hall Revitalization Project will generate measurable operational cost savings by replacing inefficient, end-of-life building systems with modern, high-performance infrastructure designed to reduce lifecycle operating and maintenance costs. Constructed in 1964, Semon Hall relies on outdated HVAC equipment with pneumatic controls, antiquated electrical distribution, inefficient lighting, single pane glazing and a deteriorated building envelope; conditions that drive elevated energy use, frequent maintenance interventions and system unreliability.

The Project will fully replace mechanical, electrical, plumbing, lighting and control systems with high-efficiency, digitally controlled systems, significantly reducing energy consumption, unplanned outages and maintenance demand. Integration with Oregon Tech's campus geothermal utility system for building heating and heated pedestrian walkways further lowers long-term heating costs and improves winter reliability compared to conventional systems. Modern building automation will enable scheduling, setback controls and real time monitoring, supporting consistent indoor environmental quality for instructional and clinical spaces while optimizing system performance.

From a lifecycle perspective, the Project represents a strong return on investment: approximately $10.2 million in deferred maintenance will be eliminated through comprehensive renewal, about 19 percent of total project cost, while ongoing operational savings are realized through reduced energy use, lower maintenance intensity and extended system life. During the initial years of operation, when major systems are under warranty, Facilities staff and CIR resources can be redirected to other high need buildings, accelerating progress in reducing the university's overall deferred maintenance backlog.

The HECC Capital Project Cost Summary Form, included in *Appendix B*, reflects these assumptions and anticipated savings over the building's lifecycle.

Potential for Sustainability – Efficient Use of Energy Resources

Sustainability is advanced through capital renewal that improves environmental performance, operational efficiency and long-term program viability. The revitalized Semon Hall will be designed to meet LEED Silver certification, incorporating high-efficiency HVAC systems, improved insulation and glazing, energy-efficient lighting, advanced controls and low maintenance materials. The Project is intended to meet or exceed current energy and sustainability standards applicable to public higher education facilities, consistent with Oregon Tech's 2024 Facilities Master Plan and recent renewal projects.

Environmental benefits are reinforced through geothermal integration, reduced energy and water consumption, improved indoor environmental quality and durable system selections that extend replacement cycles and reduce lifecycle costs. Site improvements will enhance accessible pedestrian circulation, improve winter mobility and reduce long-term maintenance needs. By reinvesting in an existing E&G facility rather than pursuing new construction, the Project avoids

additional embodied carbon and infrastructure expansion while preserving a mission critical academic asset.

Together, these measures support operational sustainability, fiscal sustainability and environmental performance, ensuring that Semon Hall can support workforce critical healthcare and allied health education efficiently and reliably over its extended service life, while delivering lasting value from public capital investment.

Potential for Sustainability –Programmatic and Operational Sustainability

The Project advances sustainability through durable, efficient program operations by colocating multiple allied health-laboratory based academic programs within a purpose designed facility, directly supporting instructional continuity and enrollment stability. Housing Dental Hygiene, Dental Therapy, Doctor of Physical Therapy, and Marriage and Family Therapy in Semon Hall enables shared use of specialized laboratories, simulation environments and patient facing clinical space designed to meet programmatic accreditation standards across disciplines. This integrated model reduces duplication of space, equipment and staffing resources while ensuring that facilities remain consistently compliant with accreditation requirements that govern instructional quality, safety and clinical preparation.

Operational sustainability is further strengthened by enabling predictable scheduling, shared laboratory workflows and coordinated use of support spaces, which reduces operational inefficiencies and minimizes disruption to instruction. Consolidation of clinical programs limits reliance on temporary or offsite facilities and provides stable, compliant and efficiently utilized space within a single modernized facility. The Project supports continuous accreditation status, protects cohort-based enrollment models and enables controlled enrollment growth, ensuring that workforce critical programs can be delivered reliably and cost effectively over the long term. These cohort assumptions are directly enabled by the revitalized instructional and laboratory space described in *Section V. Strategic Capital Development Priorities*, rather than by changes in admissions strategy or staffing alone. Together, these outcomes reinforce the sustainability of academic operations, institutional revenue stability and long-term return on public capital investment.

VII: LIFE SAFETY, SECURITY and LOSS of USE

Life Safety

The Semon Hall Revitalization Project addresses life safety and code-related deficiencies that affect the health, safety and welfare of building occupants and the public. Semon Hall is identified in the 2024 Facilities Master Plan as having a FCI rating of “Poor,” reflecting aging systems, outdated configurations and deficiencies that increase life-safety risk in a high-occupancy academic and clinical facility. Accessibility assessments have documented noncompliant ramps, constrained circulation and limited accessible routes, which affect safe ingress, egress and emergency movement for individuals with mobility limitations. In addition, seismic evaluations have identified deficiencies that do not meet current performance expectations for an essential instructional facility. Given the building’s intensive daily use and its role in laboratory and clinical-

based instruction, comprehensive renovation is required to address these life-safety risks within the requested period.

Security

The Project promotes a safe and secure environment by addressing physical security and access control limitations in an aging facility that supports instructional, laboratory and clinical functions. Semon Hall lacks a modern, integrated door locking and electronic access control system appropriate for contemporary academic and clinical settings. The Project will enable implementation of a campus integrated access control and door lock system, supporting controlled entry, emergency response protocols and coordination with campus security operations. These improvements safeguard occupants, protect university assets and align the facility with current expectations for secure operation of higher education and clinical training environments.

Loss of Use

The Project addresses the material risk of partial or full loss of use associated with existing facility deficiencies in Semon Hall and the disproportionate institutional impact that would result if the building were unavailable. As one of the primary locations for allied health instruction and clinical preparation, Semon Hall supports programs that depend on continuous access to compliant, secure and accessible instructional environments. While the building remains operational, continued use without comprehensive renewal increases exposure to accessibility limitations, seismic vulnerabilities and outdated security infrastructure that could necessitate restrictions on use or phased shutdowns over time. Because comparable space does not exist on campus to absorb these functions, any loss of use, whether partial or total, would have immediate consequences for program continuity, student progression and Oregon Tech's ability to sustain workforce critical healthcare and behavioral health education.

As mentioned in *Section III. Project Summary, Section 7.3. (Critical Institutional Need)*, the four allied health programs utilizing academic space in Semon Hall, are either accredited, provisionally accredited, or seeking accreditation. The accrediting bodies require programs to demonstrate that their physical environment fully supports effective teaching, learning and clinical preparation. This includes providing instructional and laboratory spaces that promote current best practices in pedagogy and student success.

Accrediting bodies expect institutions to identify dedicated laboratory spaces that are: 1) conducive to high-quality instruction, meaning access to current technology and equipment that is reflective of contemporary practice, 2) designed for safe utilization and with appropriate safety features, 3) and well-maintained as noted in CODA (Dental Hygiene and Dental Therapy) and CAPTE (Physical Therapy) accreditation standards. As facility standards are mandatory conditions of accreditation, any inability to meet them places the program at risk of accreditation warning, probation, or loss of accreditation. Loss of accreditation could result in the closure of the program, eliminating a critical workforce pipeline and reducing access to essential services in the region.

Further, maintaining program continuity throughout any construction would be critical for the Dental Hygiene program, as the specialized needs of their classrooms and labs would prevent transfer to another location on campus without excessive cost. As a result, it is critical that the renovation of Semon Hall utilize a phased approach with the completion of the addition first, to maintain continuity of Dental Hygiene instruction and lab work. In the absence of this phased approach, the Dental Hygiene program would put their accreditation, enrollment of current students and recruitment of future cohorts at risk.

Third-party verification of life safety, seismic, security and loss-of-use conditions is provided in *Appendix C (Verification Letter – Life Safety, Security and Loss of Use)*. This appendix includes an independent assessment prepared by a professionally certified expert, substantiating these findings.

VIII: INSTITUTIONAL PRIORITY

The Semon Hall Revitalization Project is Oregon Tech's first and only capital construction priority for the 2027–2029 biennium. By advancing a single priority project, the university is deliberately concentrating institutional leadership, financial resources and implementation capacity on the renewal of a mission-critical E&G facility that directly supports workforce focused healthcare and allied health education. This designation reflects Oregon Tech's capital planning framework and decision making process and underscores the urgency of addressing documented instructional capacity constraints, accreditation-aligned space deficiencies, accessibility gaps and long-term infrastructure renewal. Identifying Semon Hall as the sole institutional priority demonstrates Oregon Tech's commitment to responsible capital stewardship, disciplined prioritization and alignment with the SCDP[1] and statewide workforce and equity goals.

IX: STUDENT SUCCESS FOR UNDERSERVED POPULATIONS

1. Underserved Population: Rural Students

As noted in *Section III. Project Summary, Section 7.2. (HECC Equity Lens and Oregon Strategic Roadmap)*, Oregon Tech is located in rural Southern Oregon and a large portion of the student body comes from rural environments themselves. In fact, institutional data indicates that across the past five years, 70 percent of in-state enrollment came from Oregon rural counties of origin, meaning that nearly three-quarters of the student population qualify as underserved.[14]

2. Student Success and Completion Model (SSCM) Data

Upon reviewing the HECC Public University Data Dashboard[11], rural students across the state and at Oregon Tech demonstrate lower rates of retention as well as six-year degree completion. Specifically, according to the most recent data (academic year 2023-2024), the overall Fall to Fall retention rate for public institutions in Oregon as a whole was 83 percent, while the rural

population across all public institutions were retained slightly less so, at 81 percent. Oregon Tech students demonstrated a similar trend: overall Fall to Fall retention for 2023-2024 was 78 percent, while rural student retention was slightly lower at 76 percent. Completion rates showed a similar pattern, with 68 percent of students across all public institutions earning a degree within six years, with slightly fewer of the rural population (66 percent) accomplishing the same. Again, Oregon Tech students mirrored this trend, with 64 percent of all students completing their degree within six years as compared to 62 percent of the rural population.[11]

3. Overcoming Barriers

According to the Institute for College Access and Success (ICAS; 2023)[19] students coming from rural communities face additional barriers to higher education including elevated rates of poverty, less college advising and poorer overall college readiness. Additionally, students with rural backgrounds have fewer opportunities to have shadowed in healthcare, given the often-limited resources in smaller communities.

> *Students who come from rural areas often enter universities less prepared than their urban counterparts and have typically lower awareness of the range of healthcare career opportunities available to them. Oregon Tech, located in Southern Oregon, offers a wide range of allied health programs and provides the opportunity for* ***rural students to study and thrive*** *in a setting in which they are comfortable.*
>
> ***- Robert Duehmig,***
> *Director*
> *Oregon Office of Rural Health*

The Semon Hall Revitalization Project, coupled with community partnerships, has the potential to empower rural students to overcome these barriers and increase the likelihood of success during their academic careers at Oregon Tech. Specifically, ICAS suggests that one beneficial strategy to support rural students is to develop a "community of support" (page 5).[19] As mentioned in *Section III. Project Summary, Section 3.2. (Raise Facility Quality)*, all of the allied health programs who will utilize the revitalized Semon Hall are cohort-based, meaning that there is an inherent community of support built into the programs. Because students will share experiences throughout their academic careers, strong social networks and supportive relationships are developed from their very first term. Further, the revitalized space will be better suited to support student collaboration, with modular classrooms and intentional space allocated for students to gather and support one another, both academically and emotionally.

The Klamath Regional Career and Technical Education (CTE) and the Sky Lakes Ambassador programs described above in *Section III. Project Summary, Section 7.2. (HECC Equity Lens and Oregon Strategic Roadmap)* will minimize the typical lack of exposure to the healthcare field described as a barrier by ICAS.[19] By providing students with healthcare-focused courses and skills-building experiences throughout high school, their interest in the health field is expected to

[19] Institute for College Access & Success. (2023). National Rural College Completion Trends, Challenges, and Solutions.

significantly increase, as well as their awareness of the opportunity to move forward along this career pathway in their own community by enrolling at Oregon Tech.

Students from rural environments tend to utilize a more hands-on approach to learning styles than their urban counterparts.[20] As such, the A+ Labs in the revitalized Semon Hall will enhance the rural students' learning experiences by providing the opportunity to practice their skills working with real patients.

4. Expected Increases in Success

With these strategies and partnership pipelines in place, the expected increases in success for the rural population at Oregon Tech are to match the institutional retention and six-year completion rates. Specifically, this would represent a two percent increase in Fall-to-Fall retention for Oregon Tech rural students (from 76 percent up to 78 percent) as well as a two percent increase in six-year completion rates (64 percent up from 62 percent).

X. LEVERAGING INSTITUTIONAL RESOURCES

Oregon Tech is leveraging significant institutional resources to support the Semon Hall Revitalization Project. The university has committed $2.7 million in institutional funds, representing five percent of the total project cost, which are in hand and available to support the Project.

These institutional resources reflect a deliberate commitment by Oregon Tech to share in the financial responsibility for renewing a mission critical academic facility and to reduce reliance on state bond funding. The funds have been designated through institutional planning processes and demonstrate the university's readiness to advance the Project in alignment with statewide capital priorities.

By investing its own resources, Oregon Tech is strengthening its capacity to deliver workforce critical healthcare and allied health education, enabling sustainable enrollment growth and timely preparation of graduates for licensed practice in high-demand fields, particularly in rural and underserved regions of Oregon.

The institutional contribution complements the state's investment and reinforces Oregon Tech's longstanding approach to responsible capital stewardship, which includes reinvestment in existing E&G facilities, proactive management of deferred maintenance and alignment of capital spending with academic mission and workforce needs. By committing its own resources, Oregon Tech strengthens the overall financial structure of the Project and underscores its commitment to delivering long-term value from public capital investments.

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APPENDIX A: DAS Bond Forms 107BF11a and 107BF12

Higher Education Coordinating Commission - Public University / Community College
Major Construction/Acquisition Project Narrative

Note: Complete a separate form for each project.

Public University or Community College:	**Oregon Institute of Technology**	Project Type - indicate percent of budget in each category; total should add to 100%:	
Project Name:	**Revitalizing Semon Hall: Advancing the Healthcare Workforce and Addressing Community Needs**	Planning/design	10%
Estimated Start Date:	Spring 2029	Land/real property acquisition	0%
Estimated Completion Date:	Spring 2032	New construction	0%
Total Estimated Project Cost[1]:	$ 54,000,000	Addition	22%
Cost per net usable square foot added or renovated:	$ 1,205	Remodel	68%
		Total	100%

[1]Include all costs regardless of proposed funding model, such as design and planning, hard and soft construction costs, land and real property acquisition, infrastructure development, furnishings and fixtures, contingencies, etc.

Project Summary (describe the nature and purpose of the project):

Revitalizing Semon Hall: Advancing the Healthcare Workforce and Addressing Community Needs will comprehensively renovate and modernize Semon Hall, a mission critical academic facility on Oregon Tech's Klamath Falls campus. The project includes seismic retrofit; full replacement of mechanical, electrical, and plumbing systems; building envelope replacement; foundation repair; and complete interior renovation and modernization of classrooms, laboratories, and clinical instructional spaces, including dental operatories, and associated equipment and technology. A limited building addition of approximately 13,500 gross square feet will support accreditation driven clinical instruction space, accessibility, cohort expansion, and long term program continuity, along with site and infrastructure improvements such as ADA compliant pedestrian routes and transportation, mobility enhancements, outdoor learning areas, and landscaping.

Facility Details (describe specific details such as number of stories, square feet, type and number of components such as classrooms and labs):

Semon Hall is an existing single story concrete and steel academic building comprising approximately 36,290 gross square feet, which will be comprehensively renovated and modernized. The project includes a limited north side single-story building addition of approximately 13,500 gross square feet, resulting in a total facility size of approximately 49,800 gross square feet upon completion. The renovated and expanded facility will include specialized classrooms, instructional laboratories, and clinical training spaces configured to meet accrediting agency requirements, supporting the Dental Hygiene, Dental Therapy, Doctor of Physical Therapy, and Marriage and Family Therapy programs, with associated laboratory, materials, simulation, and support areas. For the Dental Hygiene and Dental Therapy programs, the facility will include approximately 38 dental operatories, consistent with program accreditation standards. Building systems will support lecture capture, instructional technology, and upgraded information technology infrastructure, and the project will address ADA accessibility requirements, including interior circulation, building access, and associated site improvements.

Funding Request

Type of Funding Requested	**Project Funding Amount Requested**	**Estimated Biennial Debt Service[5]**	**Debt Service[5] Funding Source**
General Funds/Lottery Funds	$ -	$ -	N/A
Article XI-F(1) Bond Proceeds[2, 4]	-	-	Other Funds
Article XI-G Bond Proceeds[3, 4]	2,700,000	-	General Fund
Article XI-Q Bond Proceeds[4]	48,600,000	-	General Fund
Lottery Revenue Bonds	-	-	Lottery Funds
Total	$ 51,300,000	$ -	

For Article **XI-F(1)** bond requests, indicate the revenue sources for university loan repayments to be used by HECC to pay debt service:

n/a

For Article **XI-G** bond requests, indicate the source(s) and amounts of matching funds:

On-hand university monies. Board-designated quasi-endowment.

For additional required project funding (i.e. beyond requested state funds and Article XI-G matching funds), indicate sources and amounts:

n/a

Notes:

[2]Article XI-F(1) bond proceeds are loaned to the university, and the loan repayments from the university are used by HECC to pay debt service on the bonds. HECC will request information from the university to perform its evaluation of revenue sufficiency (ORS 350.095) for requests to fund projects with Article XI-F(1) bond proceeds.

[3]Article XI-G bond proceeds are granted to a university or community college, and the Constitution requires matching funds be provided by the university or community college.

[4]For Public University projects, Article XI-F(1), XI-G, and XI-Q bond proceeds are limited to project costs that are allowed under generally accepted accounting principles to be capitalized to the asset being financed, with the exception of certain pollution remediation costs that are required by law to complete the project; thus, do not include non-qualifying costs of the project in amount requested to be financed by bonds.

[5]Debt service costs for all bonds must be obtained from DAS Capital Finance for inclusion in Agency Request Budget.

Capital Financing Six-Year Forecast Summary 2027-29

Agency: _HECC - Oregon Institute of Technology_

Agency #: _525000 _____

Provide amounts of agency financing needs for the 2027-29 biennium, by expected use and repayment source. Include proposed project amounts only (do not include debt service from either previously issued debt or from new debt issuance).

Use of Bond Proceeds	Bond Type: General Obligation Bonds	Bond Type: Revenue Bonds	Totals by Repayment Source	
Major Construction / Acquisition Projects				
General Fund Repayment	$ 51,300,000	$ -	$ 51,300,000	GF
Lottery Funds Repayment	-	-	-	LF
Other Funds Repayment	-	-	-	OF
Federal Funds Repayment	-	-	-	FF
Total for Major Construction	$ 51,300,000	$ -	$ 51,300,000	
Equipment/Technology Projects over $500,000				
General Fund Repayment	$ -	$ -	$ -	GF
Lottery Funds Repayment	-	-	-	LF
Other Funds Repayment	-	-	-	OF
Federal Funds Repayment	-	-	-	FF
Total for Equipment/Technology	$ -	$ -	$ -	
Debt Issuance for Loans and Grants				
General Fund Repayment	$ -	$ -	$ -	GF
Lottery Funds Repayment	-	-	-	LF
Other Funds Repayment	-	-	-	OF
Federal Funds Repayment	-	-	-	FF
Total for Loans and Grants	$ -	$ -	$ -	
Total All Debt Issuance				
General Fund Repayment	$ 51,300,000	$ -	$ 51,300,000	GF
Lottery Funds Repayment	-	-	-	LF
Other Funds Repayment	-	-	-	OF
Federal Funds Repayment	-	-	-	FF
Grand Total 2027-29	$ 51,300,000	$ -	$ 51,300,000	

Capital Financing Six-Year Forecast Summary 2029-31

Agency: _HECC - Oregon Institute of Technology_

Agency #: _525000 _____

Provide amounts of agency financing needs for the 2029-31 biennium, by expected use and repayment source. Include proposed project amounts only (do not include debt service from either previously issued debt or from new debt issuance).

Use of Bond Proceeds	Bond Type: General Obligation Bonds	Bond Type: Revenue Bonds	Totals by Repayment Source	
Major Construction / Acquisition Projects				
General Fund Repayment	$ 75,000,000	$ -	$ 75,000,000	GF
Lottery Funds Repayment	-	-	-	LF
Other Funds Repayment	-	-	-	OF
Federal Funds Repayment	-	-	-	FF
Total for Major Construction	$ 75,000,000	$ -	$ 75,000,000	
Equipment/Technology Projects over $500,000				
General Fund Repayment	$ -	$ -	$ -	GF
Lottery Funds Repayment	-	-	-	LF
Other Funds Repayment	-	-	-	OF
Federal Funds Repayment	-	-	-	FF
Total for Equipment/Technology	$ -	$ -	$ -	
Debt Issuance for Loans and Grants				
General Fund Repayment	$ -	$ -	$ -	GF
Lottery Funds Repayment	-	-	-	LF
Other Funds Repayment	-	-	-	OF
Federal Funds Repayment	-	-	-	FF
Total for Loans and Grants	$ -	$ -	$ -	
Total All Debt Issuance				
General Fund Repayment	$ 75,000,000	$ -	$ 75,000,000	GF
Lottery Funds Repayment	-	-	-	LF
Other Funds Repayment	-	-	-	OF
Federal Funds Repayment	-	-	-	FF
Grand Total 2029-31	$ 75,000,000	$ -	$ 75,000,000	

Capital Financing Six-Year Forecast Summary 2031-33

Agency: _HECC - Oregon Institute of Technology_

Agency #: _525000 _____

Provide amounts of agency financing needs for the 2031-33 biennium, by expected use and repayment source. Include proposed project amounts only (do not include debt service from either previously issued debt or from new debt issuance).

Use of Bond Proceeds	Bond Type: General Obligation Bonds	Bond Type: Revenue Bonds	Totals by Repayment Source	
Major Construction / Acquisition Projects				
General Fund Repayment	$ 85,000,000	$ -	$ 85,000,000	GF
Lottery Funds Repayment	-	-	-	LF
Other Funds Repayment	-	-	-	OF
Federal Funds Repayment	-	-	-	FF
Total for Major Construction	$ 85,000,000	$ -	$ 85,000,000	
Equipment/Technology Projects over $500,000				
General Fund Repayment	$ -	$ -	$ -	GF
Lottery Funds Repayment	-	-	-	LF
Other Funds Repayment	-	-	-	OF
Federal Funds Repayment	-	-	-	FF
Total for Equipment/Technology	$ -	$ -	$ -	
Debt Issuance for Loans and Grants				
General Fund Repayment	$ -	$ -	$ -	GF
Lottery Funds Repayment	-	-	-	LF
Other Funds Repayment	-	-	-	OF
Federal Funds Repayment	-	-	-	FF
Total for Loans and Grants	$ -	$ -	$ -	
Total All Debt Issuance				
General Fund Repayment	$ 85,000,000	$ -	$ 85,000,000	GF
Lottery Funds Repayment	-	-	-	LF
Other Funds Repayment	-	-	-	OF
Federal Funds Repayment	-	-	-	FF
Grand Total 2031-33	$ 85,000,000	$ -	$ 85,000,000	

APPENDIX B: HECC Capital Project Cost Summary Form

HECC CAPITAL PROJECT COST SUMMARY	Revised 3/2/2026					
Institution:	Oregon Institute of Technology					
Project Title:	*Revitalizing Semon Hall: Advancing the Healthcare Workforce and Addressing Community Needs*					
Institutional Priority Number:	1					
New construction, demolition, renewal	Renewal					
	2029 - 2030 First Year	**2030 - 2031 Second Year**	**2031 - 2032 Third Year**	**2032 - 2033 Fourth Year**	**2033 - 2034 Fifth Year**	**Total Project**
Land/Building Acquisition	$ -	$ -	$ -	$ -	$ -	$ -
Professional Services						
Architectural Services	2,970,000	1,350,000	1,080,000	-	-	5,400,000
Engineering Services	-	-	-	-	-	-
Planning Services	-	-	-	-	-	-
Other Expenses	-	-	-	-	-	-
Construction Services						
Site Improvements	-	-	-	-	-	-
Utility Improvements	-	-	-	-	-	-
Cost of Construction	6,700,000	15,618,000	11,724,000	-	-	34,042,000
Other Const. Services	1,080,000	704,000	432,000	-	-	2,216,000
Equipment and Furnishing						
Equipment	-	7,929,000	2,643,000	-	-	10,572,000
Furnishings	-	590,000	1,180,000	-	-	1,770,000
						-
Net Project Total:	$ 10,750,000	$ 26,191,000	$ 17,059,000	$ -	$ -	$ 54,000,000
* Note that bonded projects have three year project spend plan						
Operational Cost Savings (post project completion estimated)	**2031 - 2032 (Phase 1)**	**2032 - 2033 (Phases 1 & 2)**	**2033 - 2034 (Phases 1 & 2)**	**2034 - 2035 (Phases 1 & 2)**	**2035 - 2036 (Phases 1 & 2)**	
Operational Savings **(1)**	**First Year**	**Second Year**	**Third Year**	**Fourth Year**	**Fifth Year**	**Total**
Staffing	$ -	$ -	$ -	$ -	$ -	$ -
Utilities	(11,700)	(20,300)	(21,100)	(21,900)	(22,800)	(97,800)
Other	(166,800)	(347,000)	(997,150)	(1,698,700)	(2,259,700)	(5,469,350)
Totals Operational Cost Savings:	$ (178,500)	$ (367,300)	$ (1,018,250)	$ (1,720,600)	$ (2,282,500)	$ (5,567,150)

Footnotes:

(1) This summary reflects basic tuition revenue assumptions associated with phased cohort growth and operational cost-savings assumptions related to space consolidation, energy efficiency, and reduced maintenance intensity following project completion. Qualitative context related to program operations, accreditation-aligned cohort growth, and the relationship between enrollment growth and expenses is described in the Financial Plan narrative within the Business Plan section of the capital project request.

APPENDIX C: Verification Letter - Life Safety, Security and Loss of Use

mahlum

26 March 2026

The Higher Education Coordinating Commission
3225 25th Street
Salem, Oregon 97302

RE: Professional Verification – Life Safety, Security, and Loss of Use Risks
Subject: Semon Hall Renewal and Workforce Health Sciences Modernization, Oregon Institute of Technology

To whom it may concern:

My name is Kurt Haapala and I am a partner with Mahlum Architects in Portland, Oregon. I am also a Fellow of the American Institute of Architects (FAIA) and a LEED Accredited Professional licensed, in the State of Oregon, with professional experience designing and evaluating higher-education and public facilities for life safety, accessibility, seismic performance, and operational suitability for over 27 years.

Based on my review of Semon Hall, including relevant project documentation provided by Oregon Tech, the January 2024 Facilities Master Plan, associated facility condition assessments, and my personal site verification on 16 July 2025, I can verify that Semon Hall is appropriately characterized as having a Facilities Condition Index (FCI) rating of "Poor." This designation reflects aging building systems, outdated configurations, and deficiencies that materially affect life-safety performance in a high-occupancy academic and clinical facility.

LIFE SAFETY FACTORS
The university's documentation further indicates that Semon Hall does not meet current seismic design standards applicable to public instructional buildings and contains pervasive accessibility deficiencies, including non-compliant ramps, constrained circulation, and incomplete accessible routes from designated ADA parking and throughout the interior of the facility. While the facility remains in use, these conditions represent recognized vulnerabilities that elevate risk to occupants and limit the building's ability to fully support safe and equitable access under contemporary codes and standards.

The proposed Semon Hall renewal project will enhance equity and accessibility at all levels of the project, providing full access to parking, primary entrances, fully renovating bathroom functions to promote privacy and accessibility and key functionality of access controls and technology for academic, laboratory and clinical functions. The renewal will also address seismic strengthening and resiliency to protect occupants to safety exit the building.

SECURITY FACTORS

The absence of modern, integrated door locking and an electronic access control system is inconsistent with current expectations for security in university facilities supporting instructional, laboratory, and clinical functions. These deficiencies reduce safety and security of both occupants and ongoing capital investments. The Semon Hall renewal will provide modernization of access-control infrastructure as a critical enhancement to improve occupant safety, emergency response capability, and protection of public assets.

LOSS OF USE FACTORS

Semon Hall is a 1960's era facility which was built with modern construction methodologies, building systems and typical fixtures, finishes and equipment of that time period. During the subsequent 60+ years, Oregon Tech has managed to maintain and operate core departmental functions while only addressing deferred maintenance issues as they become critical. The FCI rating of "poor" illustrates a facility that is operating well beyond it's expected lifespan for most of the core building elements.

Continued reliance on incremental repairs rather than comprehensive renewal will increase the likelihood of partial loss of use over time, particularly for programs with accreditation-driven requirements for compliant, secure, and accessible instructional and clinical environments. The proposed Semon Hall renewal project appropriately addresses these life-safety, security, and loss-of-use risks through comprehensive renewal rather than short-term mitigation.

This letter is provided solely for the purpose of professional verification in support of the university's HECC capital evaluation process. I have no contractual role in the project, no responsibility for project delivery, and no responsibility for the accuracy or completeness of information provided by the university. My statements are based on professional judgment and review of materials made available to me, and I have no financial interest in the project.

Sincerely,



Kurt Haapala, FAIA LEED AP
Partner, Mahlum Architects

cc John A. Harman, MBA, CGMA, CMPE
Senior Vice President for Finance & Administration
Office of Finance and Administration- Snell Hall
OREGON INSTITUTE OF TECHNOLOGY

encl none

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L001 OT Semon Hall_HECC Verification Ltr 260326

APPENDIX D: Project Renderings, Diagram and Sketch

Figure 1: Semon Hall - Exterior Rendering, North Elevation



Figure 2: Semon Hall - Interior Rendering, Dental Hygiene and Dental Therapy



Figure 3: Semon Hall - Programmatic Diagram

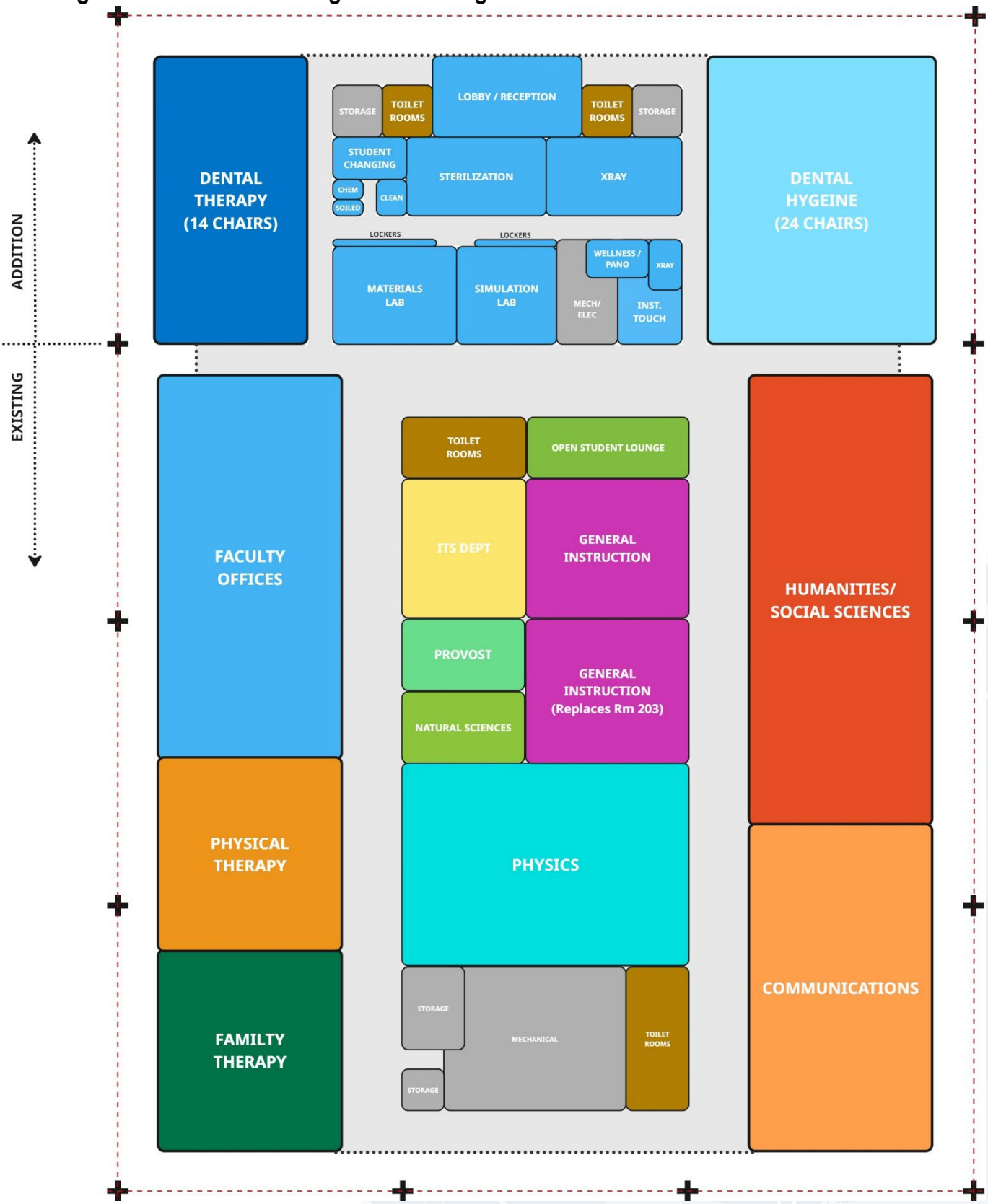
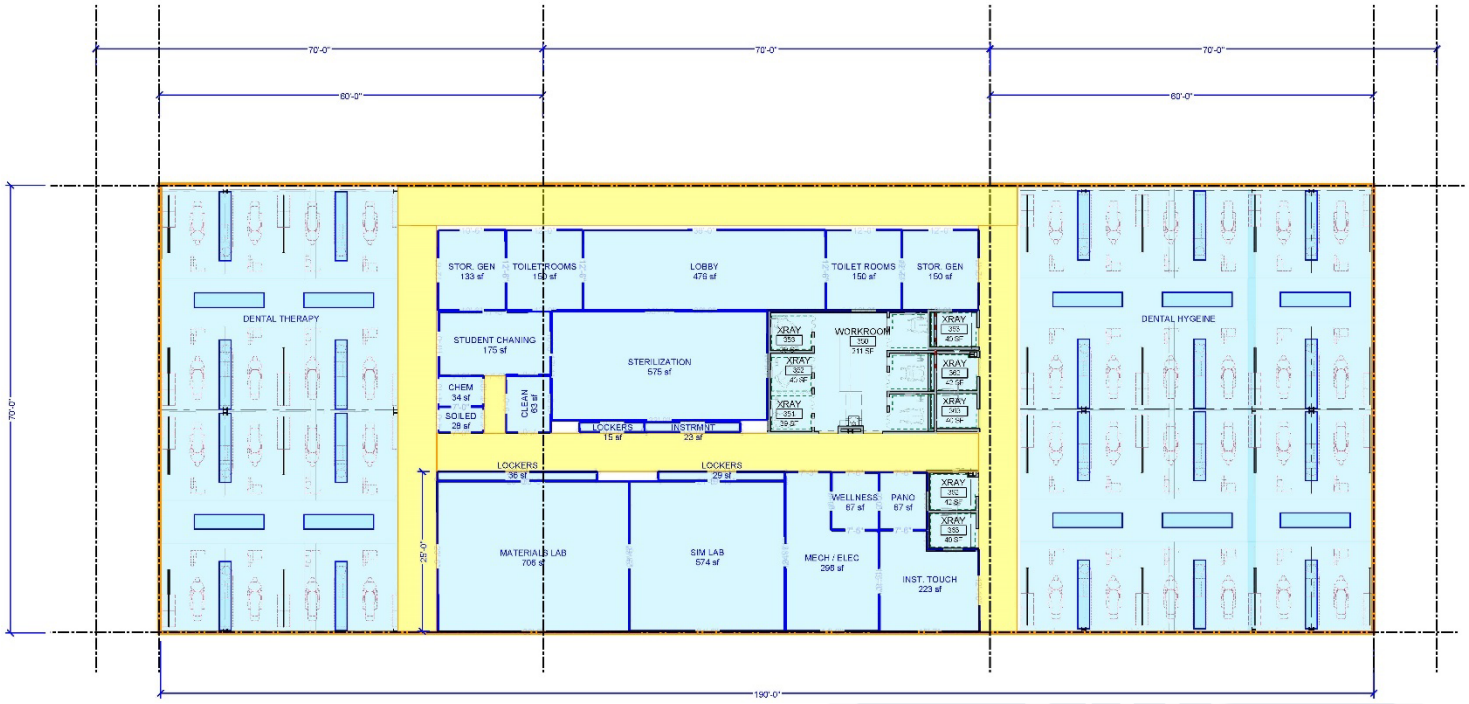


Figure 4: Semon Hall - Programmatic Sketch, Dental Hygiene and Dental Therapy



APPENDIX E: Abbreviations Glossary

This glossary is provided for reference and applies to all sections and appendices of the capital project submission.

ADA – *Americans with Disabilities Act.* Federal civil rights law that prohibits discrimination based on disability and establishes accessibility standards for facilities and programs.

ASTM – *ASTM International (formerly American Society for Testing and Materials).* Organization that develops consensus technical standards, including standards used for facility condition assessments.

CIR – *Capital Improvement and Renewal.* State and institutional funding programs used to address deferred maintenance, system renewal and capital reinvestment in existing facilities.

CTE – *Career and Technical Education***.** Educational programs and instructional pathways designed to prepare students with applied skills, technical knowledge, and credentials aligned with workforce and industry needs.

DAS – *Oregon Department of Administrative Services.* State agency responsible for capital finance, bond issuance and oversight of major public construction projects.

DPT – *Doctor of Physical Therapy.* A professional doctoral program preparing graduates for licensed physical therapy practice.

E&G – *Education and General.* Academic and administrative space and activities supported by core institutional operating funds, excluding auxiliary enterprises.

FCA – *Facilities Condition Assessment.* A systematic evaluation of a facility's physical condition used to identify deferred maintenance and renewal needs over defined planning horizons.

FCI – *Facilities Condition Index.* A ratio that compares the cost of identified deferred maintenance to the total replacement value of a facility and is used as an indicator of overall facility condition.

FICM – *Facilities Inventory and Classification Manual*. A national standard published by the National Center for Education Statistics, an evaluation arm of the U.S. Department of Education, that defines space classifications and reporting conventions used in higher education facilities planning, utilization analysis, and capital project evaluation.

GSF – *Gross Square Feet.* The total floor area of a building measured to the exterior face of walls, including both assignable and non-assignable space.

HECC – *Higher Education Coordinating Commission.* Oregon state agency responsible for coordinating postsecondary education policy, finance and capital planning.

ICE – *Integrated Clinical Experiences***.** Structured, supervised clinical learning activities embedded within academic programs that integrate didactic instruction with hands-on patient care or applied practice in clinical settings.

IRS – *Internal Revenue Service.* Federal agency responsible for tax administration, including oversight of tax-exempt bond compliance.

LEED – *Leadership in Energy and Environmental Design.* A nationally recognized green building certification program administered by the U.S. Green Building Council.

MEP – *Mechanical, Electrical and Plumbing.* Core building systems that support heating, cooling, power distribution, water and wastewater functions.

MFT – *Marriage and Family Therapy.* A licensed mental health profession and graduate discipline preparing practitioners to treat individuals, couples and families.

NUSF – *Net Usable Area (Net Usable Square Feet).* The sum of all areas on all floors of a building either assigned to, or available for assignment, an occupant or specific use, or necessary for the general operation of a building.

SCDP – *Strategic Capital Development Plan.* The statewide, long-range capital planning framework prepared by HECC to guide higher education capital investments.

8.3

Action Item: Approval of 2026-2027 Institutional Goals

ACTION ITEM

Agenda Item No. 8.3

Recommendation to Approve 2026-2027 AY Institutional Goals

Proposed Institutional Goals

President Naganathan proposes 11 institutional goals for the 2026-2027 academic year, with the eleventh as a cross-cutting fundraising goal.

Each annual goal is a measurable step toward the 2030 target, as outlined in the 2027-2030 Strategic Plan, summarized below.

Goal	2030 Target	Proposed 2026-2027 Goal
1. Grow & Diversify Enrollment	10% growth in enrollment by 2030	Grow Fall 2027 enrollment 1.5%, including 550+ new first-year students and 3% growth in Oregon transfers
2. Maximize Retention & Graduation	80% first-to-second-year retention; +10 points in graduation rate	Raise first-year retention to 76% (from 75%)
3. Every Student Gains Applied Experience	70% of graduates complete applied learning	Raise applied-learning participation by 10% or more (from approximately 40% today)
4. Tech-Forward, Workforce-Ready Education	Modernized, future-focused academic programs	Launch two new BS-to-MS pathways and a Center for Teaching & Learning
5. Build High-Performance Computing Capacity	HPC infrastructure for AI, research, and the medical school	Scope the HPC site, uses, and vendor; fund platform and infrastructure
6. Advance Medical School Accreditation	Foundation complete for a new public medical school	Present the College of Medicine business proforma to the Board by June 2027
7. Oregon's Indispensable Workforce Partner	Expanded high-impact employer and community partnerships	Complete the first partnership inventory and cultivate 20+ new workforce partners
8. Make Oregon Tech a Premier Place to Work	Stronger faculty and staff recruitment and retention	Launch a campuswide calendar featuring events, training, and communications; launch the Leadership Academy and faculty mentorship (20+ engaged)
9. Optimize Facilities for Learning & Stability	Data-driven, sustainable campus investment	Pilot a data-based capital-request framework, with space-utilization baselines and shared-use standards

Goal	2030 Target	Proposed 2026-2027 Goal
10. Unify Brand & Institutional Identity	One recognizable Oregon Tech brand statewide	Advance a unified "One Brand Approach," with measurable gains against the 2024 baseline established by external firm VisionPoint Marketing
11. Cross-Cutting Fundraising Goal	Raise $7.2M with the Oregon Tech Foundation	Raise $7.2M with the Oregon Tech Foundation

Recommendation to the Full Board to Approve the 2026-2027 AY Institutional Goals

After discussion and review of the documents, the President recommends to the full Board of Trustees that the Board approve the proposed 2026-2027 AY Institutional Goals.

Attachments and Additional Information

See Attachment A for the Institutional Goals Dashboard

11 Proposed Institutional Goals for 2026-27

Oregon TECH

1 Enrollment

Grow Fall 2027 enrollment 1.5%: 550+ new freshmen, +3% Oregon transfers

2 Retention & Graduation

Raise first-year retention to 76% (from 75%; toward 80% by 2030)

3 Applied Experience

Raise applied-learning participation 10%+ (from ~40%)

4 Academic Programs

Launch 2 new BS-to-MS pathways and a Center for Teaching & Learning

5 High Performance Computing

Scope HPC site and vendor; fund platform and infrastructure

6 Medical School

Present College of Medicine business proforma to the Board by June 2027

7 Workforce Partnerships

Complete first partnership inventory; add 20+ new workforce partners

8 People & Culture

Launch campus events/comms calendar and Leadership Academy (20+ engaged)

9 Facilities Improvement

Pilot a data-based capital-request framework with space-utilization baselines

10 Brand & Identity

Advance a unified "One Brand Approach"; measure gains vs. the 2024 baseline

11 Cross-Cutting Fundraising Goal: Raise $7.2M with the Oregon Tech Foundation