

## NOTICE OF PUBLIC MEETING

The Board of Trustees of the University of Oregon will hold a public meeting in the Giustina Ballroom of the Ford Alumni Center on the Eugene campus at the following times.

**Monday, March 14th, 2022, at 9:30 a.m. Pacific Time**

**Tuesday, March 15th, 2022 at 9:30 a.m. Pacific Time**

Subjects of the meeting will include standing reports; reports and discussions on student success, state affairs, student basic needs and related funding, the institutional diversity dashboard and university climate survey, Pine Mountain Observatory, and board chair transition; Fiscal Year 2022-2023 (FY23) tuition and fees; Ballmer Institute for Children's Behavioral Health Initiative presentation and real estate acquisition; and, Knight Library restoration and Oregon Acoustic Research Lab capital projects authorizations.

The meeting's agenda and materials are available at <https://trustees.uoregon.edu/upcoming-meetings>.

A livestream link will be available at: <https://trustees.uoregon.edu/meetings>. If telephone conference, sign language for the deaf or hard of hearing, or accessibility accommodations are required, contact [trustees@uoregon.edu](mailto:trustees@uoregon.edu) at least two business days in advance of the posted meeting time. Please specify the sign language preference if applicable.

### Public Comment

To provide public comment during the meeting, or if you would like to provide remote public comment, please sign up by emailing [trustees@uoregon.edu](mailto:trustees@uoregon.edu) and include your name, affiliation with the university, and topic for discussion. Public comment guidelines are available [here](#).

Those wishing to provide comments in writing may do so via [trustees@uoregon.edu](mailto:trustees@uoregon.edu). All written comments will be shared with members of the board, but to ensure comments are provided to trustees *in advance* of the meeting, they must be received by 5:00 p.m. Pacific Time on March 10, 2022.

### BOARD OF TRUSTEES

6227 University of Oregon, Eugene OR 97403-1266 | (541) 346-3166 | [trustees.uoregon.edu](mailto:trustees.uoregon.edu) | [trustees@uoregon.edu](mailto:trustees@uoregon.edu)

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Board of Trustees Meeting Material  
March 2022 | Page 1 of 304

**Board of Trustees  
Public Meeting  
March 14-15, 2022**

**March 14, 2022 | 9:30 AM PST  
Ford Alumni Center Ballroom | Eugene Campus**

**Convene Public Meeting**

- Call to order and verification of a quorum
- Approval of minutes from the December 2021 full board meeting, December 2021 EAC meeting, and January 2022 EAC meeting

**1. Public Comment and Standing Reports.**

**1.1 Public Comment (if requested):**

- Officers of Administration Council
- Campus Labor Organizations
- Other Public Comment

**1.2 Public Comment Session Regarding FY22 Tuition and Fees.**

Priority will be given to students and prospective students. Those who prefer to submit comments in writing may do so via email to [trustees@uoregon.edu](mailto:trustees@uoregon.edu). All written comments will be shared with trustees; however, only those received by 5:00 p.m. PT on March 10th are guaranteed to be provided prior to the meeting's start.

*To provide comment at the board meeting, or if you would like to provide remote public comment, email [trustees@uoregon.edu](mailto:trustees@uoregon.edu) with your name, affiliation to the UO, topic of discussion.*

**1.3 Standing Reports**

- 1.1 ASUO.** Isaiah Boyd, ASUO President
- 1.2 University Senate.** President Spike Gildea
- 1.3 Provost and President Reports.** Patrick Phillips, Provost and Senior Vice President; Michael Schill, President and Professor of Law

**2. Capital Projects Approval (Actions)**

- 2.1 Knight Library Exterior Restoration Project.** Michael Harwood, Associate Vice President and University Architect.
- 2.2 Oregon Acoustic Research Lab.** Cass Moseley, Interim Vice President for Research and Innovation

**Meeting recessed until approximately 1:30 p.m.\***

*\*Time subject to change and will be announced at the time of recess.*

**3. Ballmer Institute for Children's Behavioral Health**

- 3.1 Institute Overview.** Patrick Phillips, Provost and Senior Vice President, Randy Kamphaus, Acting Institute Director
- 3.2 Real Estate Acquisition.** Kevin Reed, General Counsel; Kelly Walsh, Shareholder, Schwabe, Williamson & Wyatt; Jane Gordon, Vice Provost for Portland.

**BOARD OF TRUSTEES**

4. **Quarterly Financial Reports.** Jamie Moffitt, Vice President for Finance and Administration and Chief Financial Officer.
5. **Student Basic Needs and Funding.** Marcus Langford, Dean of Students; Jimmy Howard, Associate Dean of Students.
6. **State Affairs Update.** Hans Bernard, Associate Vice President for State Affairs.

**Meeting recessed until 9:30 a.m. March 15, 2022.**

7. **Tuition and Mandatory Fees (Action):** Michael Schill, President; Jamie Moffitt, Vice President for Finance and Administration and CFO; Kevin Marbury, Vice President for Student Life (Co-Chairs of the Tuition and Fee Advisory Board)
8. **Internal Audit Update and Shared Business Services Report.** Leah Ladley, Chief Auditor; Jamie Moffitt, Vice President for Finance and Administration and CFO.
9. **Academic Area in Focus.** Pine Mountain Observatory. Scott Fisher, Astronomy Lecturer and Outreach Director, Director of Undergraduate Studies.

**Meeting recessed until approximately 1:00 p.m.\***

*\*Time subject to change and will be announced at the time of recess.*

10. **Institutional Diversity Dashboard and University Climate Survey.** Patrick Phillips, Provost and Senior Vice President; Yvette Alex-Assensoh, Vice President for Equity and Inclusion; Mark Schmelz, Chief Human Resources Officer; Sung-Woo Cho, Associate Vice Provost for Academic Data Analytics.
11. **Semi-Annual Report on Student Success – Student Success 2.0.** Kimberly Johnson, Vice Provost for Undergraduate Education and Student Success; Claire Matese, Assistant Director of Institutional Research.
12. **Board Chair Transition.** Chuck Lillis, Chair. Ross Kari, Finance & Facilities Committee Chair

**Meeting Adjourned**

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## **Agenda Item #1**

### **Public Comment & Standing Reports**

- Public Comment
- ASUO President
- UO Senate President
- Provost's Report
- President's Report

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To: UO Board of Trustees  
From: Spike Gildea, Professor of Linguistics and President of the University Senate  
Re: Remarks to the BoT regarding Senate actions this Winter

The University Senate has met four times since my last communication, once Fall term (December 1) and three times Winter term. At those four meetings, we have passed eight motions, four as Legislation, one as a Policy Proposal, and three as Resolutions.

With regard to Legislation, we have passed the new overall framework for evaluation and improvement of teaching on campus ([US21/22-06](#)), several overarching changes to the UO Senate Committee system ([US21/22-07](#)), and motions to disband the ROTC and Tenure Reduction, Retirement, and Emeriti Committees ([US21/22-10](#) and [US21/22-08](#)). Focusing on this latter motion, I highlight the importance of our vote, which came after long debate and substantial modification of the original proposal, to approve our new system of teaching evaluation. Over the course of the last year we have slowly worked to put the new teaching evaluation framework through the appropriate process of faculty consultation. Thanks to the thoughtful comments of many faculty members (including trenchant criticism from several), the framework went through two rounds of revision before the new, greatly improved version was approved by a substantial majority in the January 12 meeting. From my perspective as President of the Senate, this is a major victory, as the framework now provides substantially more flexibility for the departments to customize the details as appropriate to their individual disciplines. The next step will be a focus on improving the processes for peer evaluation and improving response rates for Student Experience Surveys.

With regard to the Policy Proposal, we passed a new Proprietary Research Policy ([US21/22-03](#)) developed by an interdisciplinary *ad hoc* faculty committee that makes it possible for faculty to conduct a broader range of research than the previous policy had allowed.

With regard to resolutions, first we passed the resolution I mentioned in last year's BOT report, defending academic freedom to teach about race and gender justice and, in particular, Critical Race Theory ([US21/22-04](#)). The next two resolutions ([US21/22-09](#) and [US21/22-11](#)) are linked. Resolution US21/22-09 passed unanimously, asking the university to stop using the Latin masculine term *emeritus* in all formal UO policies and official UO websites, and instead to use non-gendered language to refer to honored retired faculty. In brief, in current university policy documents, the masculine singular term *emeritus* is used for those faculty who retire with honor and gain certain privileges enumerated in policy (for example, on this page the term is used 17 times: <https://policies.uoregon.edu/policy/by/1/0201-personnel/faculty-rights-privileges-and-perquisites-retired-faculty>). However, the Latin terminology also has other forms: feminine *emerita*, masculine plural *emeriti*, and feminine plural *emeritae*, which are regularly used on departmental webpages to refer to individuals and groups of faculty who have retired with this honor. This use of gendered terminology has the unintended consequence of thereby obligatorily gendering retired faculty according to a binary distinction that may or may not feel appropriate to each individual. Resolution US21/22-11, which passed overwhelmingly (but not unanimously, with the writer of this report one of the few who voted against it) asks the university to use only the non-gendered term *emerit* (pronounced *eMERit*) in the formulation of policies and on websites that explain these policies. This final resolution also explicitly asks that honored retired

faculty be offered a choice of honorific term to use in the departmental website and in communications with the university, in the same way that they are free to choose their pronouns: the default would be the non-gendered *emerit*, but individuals could still choose to use the masculine *emeritus* or the feminine *emerita*, as they prefer. In all cases, the plural would be the non-gendered *emerits*.

## **Agenda Item #2**

### **Certain Capital Projects**

- 2.1 Knight Library Restoration Project**
- 2.2 Oregon Acoustic Research Laboratory**

## **Agenda Item #2.1**

### **Knight Library Exterior Renovation Project**

The Board of Trustees (Board) must approve all capital projects which will exceed \$5 million in total cost. Below is a description of the Knight Library Exterior Restoration project, which has a total cost that exceeds the \$5 million threshold. As a result, the University requests Board authorization to move forward with all three phases of the restoration. The following summary provides additional information about the Knight Library Restoration project and the resolution authorizing the project.

The Knight Library Restoration project will comprehensively restore the deteriorated exterior of one of the campus' largest and historically significant buildings. Actions include brick cleaning and sealing, window detailing and thermal improvements, roof replacement, and historic foundation restoration. The project is broken into three phases

**Status & Timeline:** The project is broken into three phases.

*Phase 1 (CY22):* Design of all three phases of the project. Restoration of the middle and south portions of the buildings and the north historic entry doors.  
Design work has been completed.

*Phase 2 (CY23):* Restoration of the northern historic section of the building.

*Phase 3 (CY25):* Restoration of the historic foundation, north landscape area, and surrounding concrete plaza and terraces.

**Costs & Sources of Funds:** The total anticipated budget for the project is \$15 million.

*Phase 1: 2019-2021 \$4M*

*Phase 2: 2021-2023 \$8M*

*Phase 3: 2023-2025 \$3M*

The university will fund the project using State Capital Improvement Funds (CIP). Funding has been secured for Phase 1 and Phase 2 of the project, with the expectation that Phase 3 will be funded in an upcoming legislative session. If funding is not secured for Phase 3, the project could be suspended or halted without further progress.

The University requests the board approval of all three phases of the Knight Library Exterior Restoration project.



# Knight Library Exterior Restoration

## PROJECT DESCRIPTION

Ellis Fuller Lawrence's original plan called for an auditorium to be built on this site, as the termination of the south axis and most important building in his beaux-arts plan. The axis extended from the auditorium to Dad's Gates and beyond to the train station. However, the decision was made by President Hall to build a library in its place. The library was funded by the Public Works Administration ("PWA") and the Works Progress Administration ("WPA") program funds and is representative of the last surge of building before WWII.

The library has been referred to as Oregon's best example of integrated art and architecture. It is the most fully executed of Lawrence's buildings incorporating sculpture, painting and metalwork, much done by students, graduates, and professors.

## Objectives

This project will comprehensively restore the deteriorated exterior envelope of one of UO campus' largest and historically significant buildings. The work will be completed in three phases to align with three cycles of state biennial Capital Improvement funding. Restoration elements includes:

- Extensive brick tuck pointing
- Brick cleaning and sealing
- Careful wood trim and door restoration
- Decorative bronze cleaning
- Window detailing and thermal improvements

## PLANNED PROJECT

- Roof replacement which includes insulation upgrades
- Painting
- Historic fountain restoration

## Project Status

The project will be implemented in 3 phases:

- Phase 1 (Y22): Design of all three phases of work. Restoration of the middle and south portions of the building. The north historic entry doors are also included. (Design completed)
- Phase 2 (Y23): Restoration of the northern historic section of the building.
- Phase 3 (Y25): Restoration of the historic fountain, north landscape area, and surrounding concrete plaza and terraces.



**Project Type:** Exterior Restoration

**Space Type:** Library

**Square Footage:** N/A

**Anticipated Budget:** \$15M

**Funding Source(s):**

State Capital Improvement Funds

- Phase 1: 2019-2021 \$4M
- Phase 2: 2021-2023 \$8M
- Phase 3: 2023-2025 \$3M

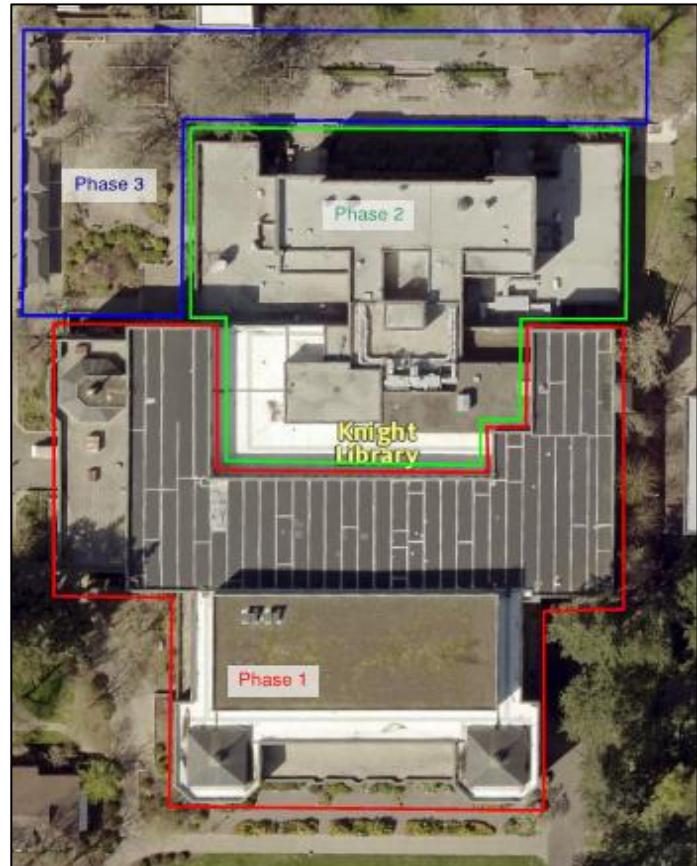
**Expected Project Duration:** 4-5 years



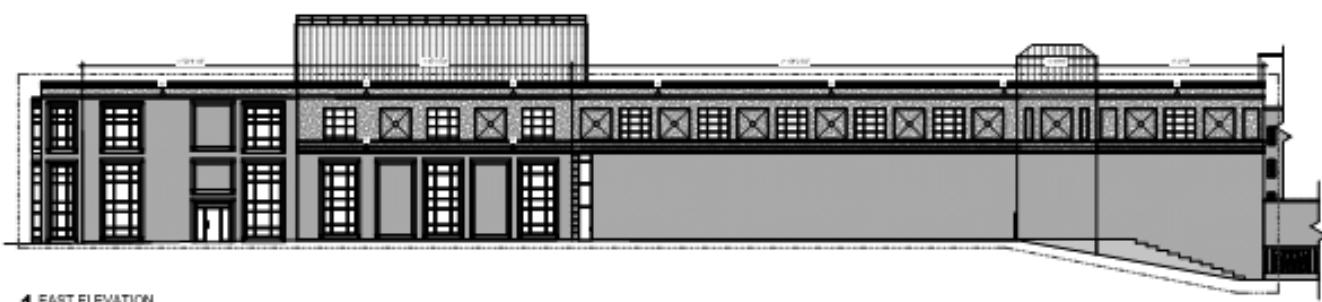
North Elevation



South Elevation



Aerial Phasing Plan



1 EAST ELEVATION



2 WEST ELEVATION

**Board of Trustees of the University of Oregon**

**Resolution: Authorization for Certain Capital Expenditure (Knight Library Exterior Restoration)**

WHEREAS, the Knight Library is one of the largest and historically significant buildings on campus and was created by the Public Works Administration;

WHEREAS, the Knight Library Exterior is in need of significant deferred maintenance and restoration to maintain the exterior envelope of the building;

WHEREAS, the proposed project has a total estimated cost of \$15 million, which will be funded by State Capital Improvement Funds provided by the State Legislature, having already secured \$4 million to fund Phase 1 and \$8 million to fund Phase 2 of the restoration; and,

WHEREAS, Board of Trustees' approval is required for capital projects exceeding \$5 million in total cost.

NOW, THEREFORE, the Board of Trustees of the University of Oregon hereby authorizes the president or his designee(s) to execute contracts, expend resources, and engage in work necessary for completion of the Knight Library Exterior Restoration project.

Moved: \_\_\_\_\_ Seconded: \_\_\_\_\_

Record here if voice vote taken without calling roll: \_\_\_\_\_

Trustee	Vote	Trustee	Vote
Aaron		Lillis	
Boyle		Lo	
Evans Jackman		Madison	
Fick		Murray	
Holwerda		Seeley	
Hornecker		Ralph	
Kari		Worden	

Dated: \_\_\_\_\_ Initials: \_\_\_\_\_

## **Agenda Item #2.2**

### **Oregon Acoustic Research Lab**



The Board of Trustees (Board) must approve all capital projects which will exceed \$5 million in total cost. The Board is asked to consider approval of a capital project to construct a new state-of-the-art acoustics testing facility—the Oregon Acoustics Research Lab (OARL), which exceeds the \$5 million threshold. The request below is to authorize the President and his designees to take all actions necessary and proper to secure federal grant funding for the purposes of constructing the OARL.

A smaller-scale version of this construction project was brought to the Board of Trustees at the Fall 2019 meeting at which the board approved an \$8.75M facility. Due in part to information collected during design phase, including the 100% design development documentation of the acoustics chamber, and in part due construction cost escalations related to COVID-19, the project was halted. With a new major funding opportunity through the Economic Development Administration Build Back Better Regional Challenge, the project team updated and expanded the scope of the proposed construction facility.

With expanded scope and construction inflation, the total construction cost is now estimated at \$18.75M. The university is requesting \$15M from EDA. The remaining \$3.75M will be provided as cost share from the Business Oregon's University Innovation Research Fund, which was secured on February 14, 2022.

The EDA grant is due March 15, 2022. Due to potential complications with submitting the application at the deadline, President Schill invoked the delegation of authority clause, allowing him to act when consideration by the board is impractical. He approved the construction project in order to facilitate the submission of the grant proposal to the Economic Development Administration (EDA)'s Build Back Better Regional Challenge Phase II proposal. The application will also include an institutional support letter from President Schill confirming that the university supports and intends to embark on this project. The board is now asked to ratify that decision.

Traditionally, a capital project would come before the board slightly later in the planning process, after engineering and other cost estimates can be completed in a more accurate fashion. However, we believe board approval now, before robust review of the grant at the federal level, is important to its success. Campus Planning and Facilities Management and the project team led by Kevin Van Den Wymelenberg have worked to create the best possible estimates both for your approval and the grant.

The project is supported by the College of Design, the Office of the Vice President for Research and Innovation, and the Office of the Provost. The below information is provided by the project team for the Oregon Acoustics Research Laboratory:

- Cassandra Moseley, Interim Vice President for Research and Innovation: Principal Investigator (PI) for EDA grant
- Kevin Van Den Wymelenberg, College of Design: Co-PI for EDA grant
- Judith Sheine, College of Design, TallWood Design Institute: Co-PI for EDA grant
- Mark Fretz, College of Design
- T. Dale Northcutt, College of Design
- Jason Stenson, College of Design

### **EDA Build Back Better Regional Challenge**

In July 2021, the EDA released the Build Back Better Regional Challenge, a program designed to “transform regional economies through groups of complementary, aligned projects that will help regions recover from the coronavirus pandemic and increase resilience. These regions will have the opportunity to supercharge their local economies by growing new regional industry clusters or scaling existing ones.” In response to this opportunity, a group of researchers at the University of Oregon and Oregon State University, in partnership with the Port of Portland, Oregon Department of Forestry, Business Oregon, and the Oregon Department of Land and Conservation Development formed the Oregon Mass Timber Coalition. The aim of this group is to advance Oregon’s established mass timber industry ecosystem and grow a regional cluster as it scales up innovative economic development projects that lead to economic recovery and address commonly shared challenges of low wages, inequality, and disparities of benefit.

The team received the Phase I award and is in the process of preparing a Phase II submission. Only 60 groups out of 529 original applicants across the country moved on to this second stage, and it is anticipated the EDA will fund about half of the Phase II applications.

### **Project Overview**

One of the proposed projects for the Mass Timber Coalition is the construction of a state-of-the-art facility for conducting acoustics tests of mass timber assemblies. The lack of such a facility on the West Coast is a widely recognized barrier to the development of affordable mass timber multi-family housing. Certified acoustics tests need to be conducted for a large variety of mass timber assemblies to further the adoption of mass timber panels in the residential construction market. The timber industry and design teams need easy and rapid access to the proposed facility, its equipment, and UO’s research expertise to measure airborne and impact sound transmission of building materials and construction assemblies and to develop new and improved products and assemblies.

The acoustics laboratory is expected to test a high volume of assemblies and increase access to testing for West Coast manufacturers given the nearest current reliable alternative is in Pennsylvania. Testing access is likely to increase investments into acoustical product manufacturing already present in Oregon and attract additional manufacturers. The acoustics laboratory will increase synergies between UO Architecture and OSU Architectural Engineering. Finally, the EDA grant for which UO and OARL is a part, aims to address the severe shortage of housing, including affordable housing, in Oregon and along the West Coast. The acoustic laboratory will be built at Portland’s Terminal 2 site—a former marine facility that will be redeveloped through the coalition proposal to also host a modular housing manufacturing facility, workforce training center, and a flex industrial space for new fabrication businesses.

The work will be carried out in three stages:

- Stage 1 – Laboratory Facility and Acoustic Chambers Construction and Commissioning  
January 1, 2023 – December 31, 2024
- Stage 2 - Acoustic Chambers Accreditation and Testing Initialization  
January 1, 2025 – September 30, 2025

- Stage 3 – Acoustics Research and Testing  
April 1, 2025 – December 31, 2027 (and beyond)

**Stage 1:** Prior to Stage 1, the applicant team completed design development drawings for a large-scale state-of-the-art two-chamber floor ceiling acoustics testing apparatus with funds awarded in 2018 by Business Oregon for a High Impact Opportunity Project. During Stage 1, these drawings will be shared via a public procurement process to obtain construction bids from design-build contractors. The research team will advertise, recruit, and hire a professional staff member with substantial floor-ceiling acoustical testing expertise to participate in the construction oversight process. University of Oregon Campus Planning and Facilities Management (CPFM) personnel will formally oversee contractor selection and manage the construction process. The research team and a selected consulting acoustical engineer(s) will regularly liaise with UO CPFM staff and selected general contractors and subcontractors to ensure facility and acoustic chambers construction are completed in accordance with design and engineering specifications. The same team will collaborate throughout the commissioning process to ensure performance thresholds are achieved.

**Stage 2:** The acoustics research team will conduct chambers testing and documentation necessary to achieve NIST's National Voluntary Laboratory Accreditation Program ([NIST-NVLAP accreditation](#)) and ensure the capabilities are present to provide testing reports that are compliant with [ASTM E90](#) for airborne and [ASTM E492](#) for impact isolation class floor-ceiling, and [ASTM E3133](#) for in-room impact acoustics tests. In addition to obtaining accreditation, the research team will develop position descriptions, and recruit and hire technical staff skilled in construction trades and acoustical testing in order to develop the OARL on-site facility team. The OARL team will be organized to take advantage of the high-throughput capacity of the floor-ceiling acoustical testing chambers, meet the technical demands of the research team, and develop and manage the industry-facing customer relations network.

**Stage 3:** It is anticipated the industry-initiated utilization rate will increase rapidly during 2025 due to current market demand and backlogs. However, the aim for the OARL schedule to balance both academically-initiated research and development and industry-initiated testing and product development during the project period. The weight of this balance will be somewhat dependent upon availability of external research awards and level of industry testing demand. For both research and industry testing, the OARL team will prioritize work associated with mass timber product development and affordable housing, but will be available for a wide range of floor-ceiling research and testing demands.

#### **Expected Outcomes:**

- Provide the first West Coast NIST-NVLAP accredited large-scale floor-ceiling testing chamber capable of delivering reliable and repeatable acoustical test results compliant with ASTM E90-2016 for laboratory airborne sound transmission coefficient (STC), ASTM E492-2016 for laboratory impact isolation class (IIC) sound transmission, and ASTM E3133-2018 for in-room impact sound.
- Provide the OARL facility and an OARL team capable of delivering five or more floor-ceiling ASTM compliant test results per day, a 20% increase in throughput capacity compared to industry standards. The OARL acoustic chambers will be able to measure floor-ceiling assemblies of at least IIC of 80 or greater and STC of 90 or greater, thus allowing high-performance assemblies to be accurately characterized.

- Research and industry testing results to support the increased utilization of mass timber assemblies in low-, mid-, and high-rise commercial buildings and housing stock.

**Future Research:** The OARL facility is likely to maintain state-of-the-art capabilities for at least the next 30-50 years and thus support substantial research and development activity for many years beyond the project period. The project team anticipates developing an industry research and testing consortium in collaboration with existing related research foundations and other large mass timber and acoustical industry members.

#### **Estimated Costs and Source of Funds**

The total construction cost is estimated at \$18.75M. The EDA specifies that funds can be requested for 80% of total project costs. Thus, \$15M is requested from EDA and \$3.75M is required as cost-share. The cost-share funds will be provided through Business Oregon's University Innovation Research Fund award secured on February 14, 2022.

#### **Anticipated Timeline**

March 15, 2022 – deadline for submission of grant proposal to EDA  
March-August 2022 – EDA review  
September 2022 – EDA award notification  
January 1, 2023 – earliest start of construction  
August 31, 2026 – possible completion date

# Oregon Acoustics Research Laboratory

Board of Trustees  
March 2022



## PROJECT STATS

### Location

The Oregon Acoustics Research Laboratory (OARL) is planned to be co-located with the Oregon Mass Timber Coalition's development at the Terminal 2 site, owned by the Port of Portland, in Portland, OR.

### Building Use and Objectives

The OARL will be used to conduct acoustic testing of floor-ceiling construction assemblies, develop innovative mass timber assemblies, develop acoustical isolation technologies, and conduct human factors comfort and physiology research. The proposed facility will attract industry engagement and co-development of intellectual property because of its high acoustical performance and high throughput testing capabilities. UO will be the only institution of higher education in North America with such a facility and it will support advancement of mass timber technologies, building acoustic material designs, and acoustics education and research programs.

### Proposed Budget

The budget to construct the facility is estimated at \$18.75M, of which \$15M is requested from the EDA Build Back Better Regional Challenge. The additional \$3.75M will be covered by an award from Business Oregon's University Innovation Research Fund (UIRF). Other costs related to

operationalizing and sustaining the facility will be covered by additional grants, fundraising, and potentially the UO Internal Bank.

### Current Project Status

The project has undergone an extensive feasibility study, including hiring a team of architects, engineers, and acoustical consultants with extensive floor-ceiling laboratory testing expertise to produce a 100% Design Development package for the acoustics chambers. UO CPFM has conducted cost-escalation estimates and UO has conducted proforma analysis for the mature operation. The UO intends to pursue a Design-Build contracting mechanism to complete the construction of the overall facility and testing chamber upon successful award from EDA's Build Back Better Regional Challenge.

### Expected Outcomes

OARL will provide the first West Coast NIST-NVLAP accredited large-scale floor-ceiling testing chamber capable of delivering reliable and repeatable acoustical test results compliant with major industry standards. The facility is likely to maintain state-of-the-art capabilities for at least the next 30-50 years.

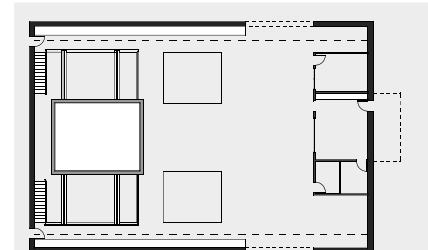


Figure 1 Floor plan

### Project Type: New Building

**Uses:** Research of mass timber and other construction assemblies, development of acoustical isolation technologies, building acoustics education, and industry contracted testing of floor-ceiling assemblies. The facility will split time between research, education, and in industry contracted acoustical testing.

**Square Footage:** Approx. 15,000

**Projected Construction Budget:**  
\$18.75 Million

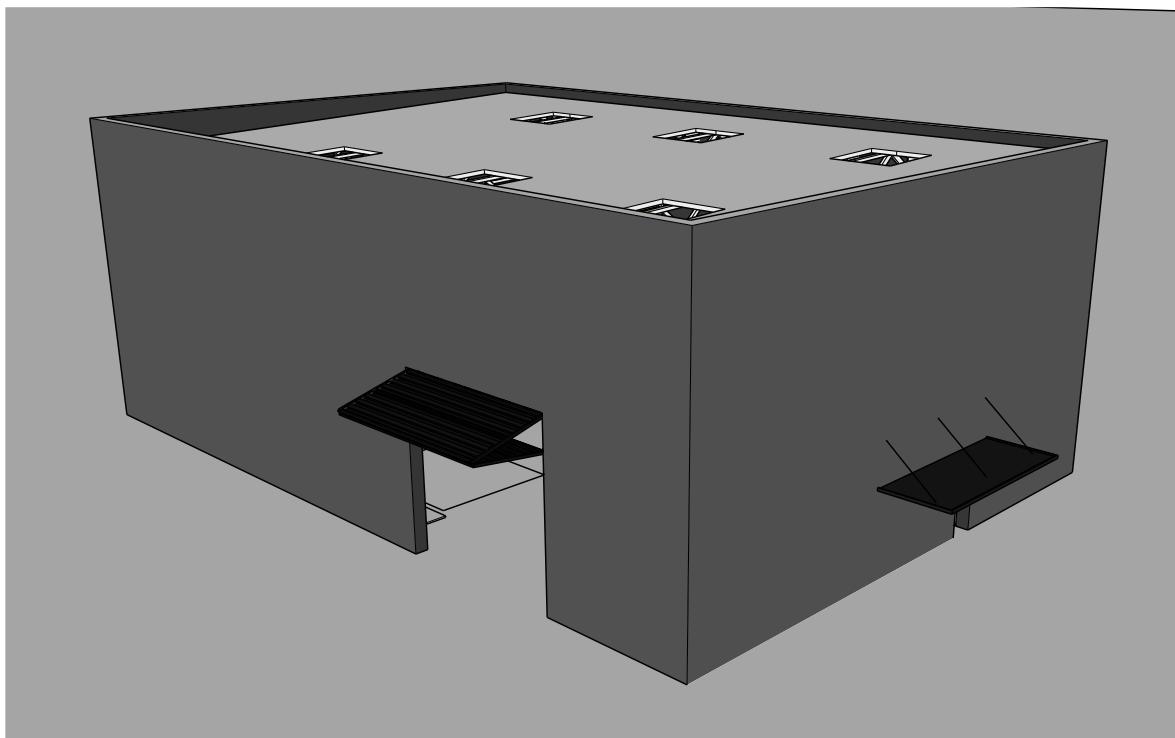
**Funding Source(s):** Cost share for the EDA grant is provided by funds from Business Oregon's UIRF program. Prior support for feasibility and design studies were provided by Business Oregon (\$702K). Support for operationalizing and maintaining the facility will come from facility user fees, as well as grants and fundraising.



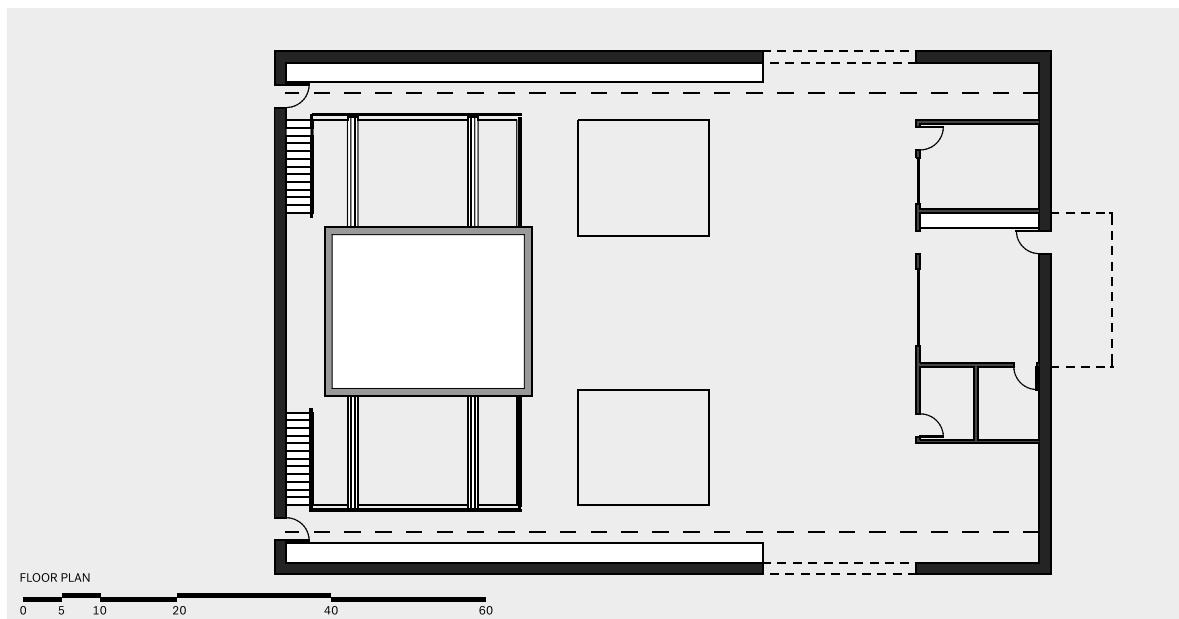
Figure 2 - Cross section of schematic design



Figure 3 - Cross section of schematic design, through acoustics chamber



*Figure 4 – Axonometric schematic of exterior*



*Figure 5 - Schematic of floor plan*

**Board of Trustees of the University of Oregon**

**Resolution: Authorization for Certain Capital Expenditure (Oregon Acoustics Research Lab)**

WHEREAS, the university is submitting a grant application to the federal Economic Development Administration Build Back Better Regional Challenge to construct the Oregon Acoustic Research Lab (OARL);

WHEREAS, the Oregon Acoustics Research Lab will be a state-of-the-art facility serving the entire west coast;

WHEREAS, the proposed project has a total estimated cost of \$18,750,000 million, of which the university has already secured \$3,750,000 from Business Oregon's University Research Fund to assist in constructing the facility;

WHEREAS, the Board wishes to demonstrate its support for the Oregon Acoustics Research Lab and the associated grant proposal;

WHEREAS, the aggregate value of the aforementioned contracts and expenditures would exceed \$5,000,000, a threshold requiring Board authorization.

NOW, THEREFORE, the Board of Trustees of the University of Oregon hereby authorizes the President and his designee(s) to take all actions necessary and proper to obtain grant funding from the Economic Development Administration for the construction of the Oregon Acoustics Research Lab as articulated in the summary materials accompanying this resolution. The project is considered preliminarily approved, but the President or his designee(s) are expected to report back to on the project's development and seek final approval of the overall budget once established. If the grant is not obtained, all approvals herein are revoked.

Moved: \_\_\_\_\_ Seconded: \_\_\_\_\_

Record here if voice vote taken without calling roll: \_\_\_\_\_

Trustee	Vote	Trustee	Vote
Aaron		Lillis	
Boyle		Lo	
Evans Jackman		Madison	
Fick		Murray	
Holwerda		Seeley	
Hornecker		Ralph	
Kari		Worden	

Dated: \_\_\_\_\_ Initials: \_\_\_\_\_

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## **Agenda Item #3**

### **Ballmer Institute for Children's Behavioral Health**

**3.1 Ballmer Institute Overview**

**3.2 Concordia Campus Real Estate Transaction**

## **Agenda Item #3.1**

### **Ballmer Institute for Children's Behavioral Health Overview**

**The Ballmer Institute for Children's Behavioral Health at the University of Oregon will be the first of its kind, establishing an ecosystem of support for Oregon's K-12 students' behavioral and mental health powered by research, public health, and public education.**

**Background:** In December 2021 Surgeon General Vivek Murthy issued an advisory highlighting the acute mental and behavioral health crisis facing our youth. The Surgeon General's advisory corroborated news we see daily, and the lived experience of teachers, school professionals and students.

It is this crisis that has called the University of Oregon to launch the Ballmer Institute for Children's Behavioral Health, a one-of-a-kind effort to provide skills and training to those who work with students every day.

Made possible by a lead gift of more than \$425 million from Connie and Steve Ballmer, the institute serves the University of Oregon's mission of teaching, research, and service, and will transform the Pacific Northwest into a national model of thought and action to address challenges in children's behavioral health.

**The Ballmer Institute:** Through the Ballmer Institute the University of Oregon will provide evidence-based research to improve the behavioral and mental health of Oregon's youth by bridging the gap between clinical research and professionals and educators working at the center of Oregon's behavioral and mental health crisis.

A multidisciplinary team of psychologists, neuroscientists, and early childhood development specialists will work to cultivate and train new cohorts of dedicated professionals in the behavioral and mental health field in these ways:

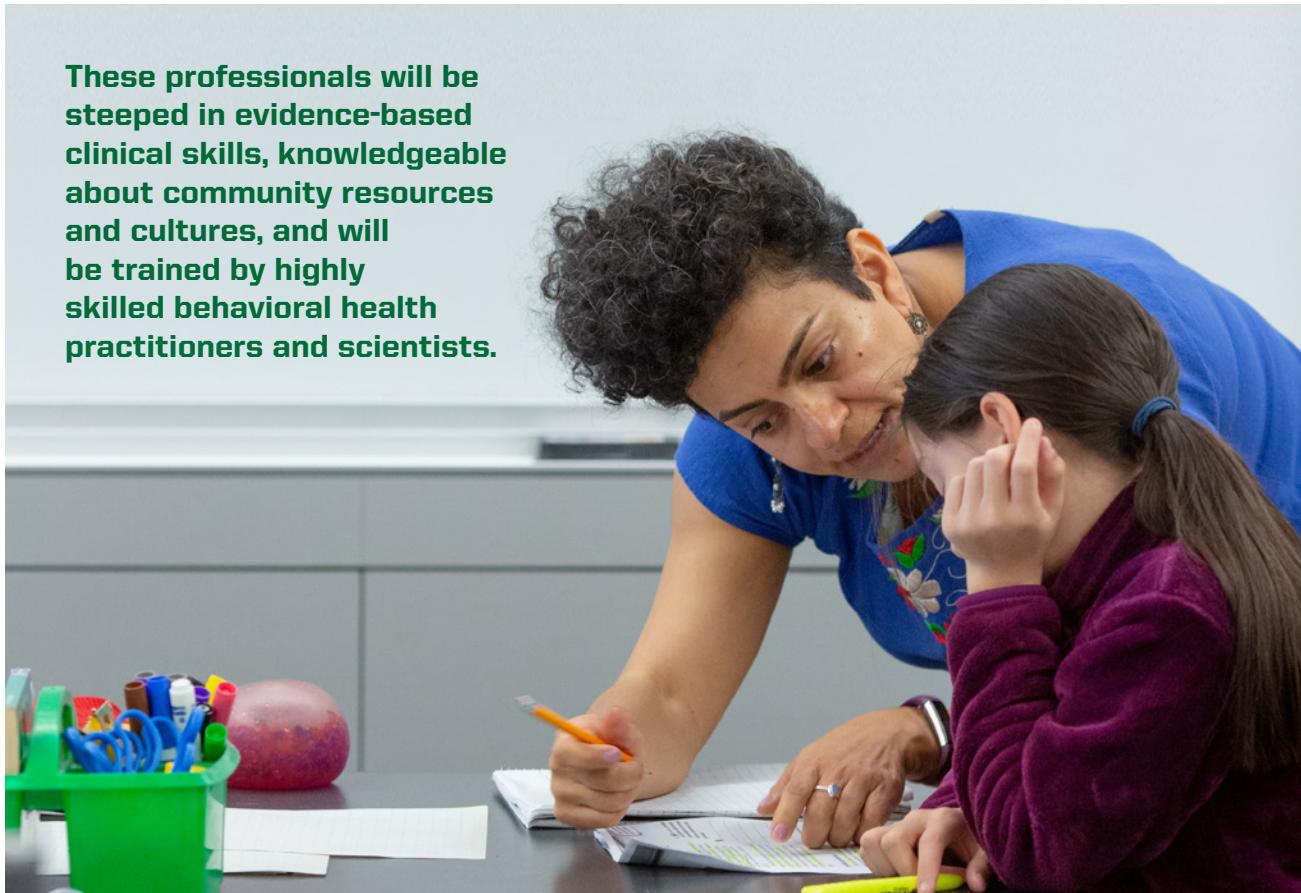
- **Training for Existing Professionals:** Create a certificate program for mid-career professionals such as teachers, support staff, early childhood/preschool teachers and daycare providers, and behavioral specialists, to equip them with the tools and techniques to promote behavioral health wellness.
- **A New Workforce:** Develop an undergraduate program, subject to state approval, to create a new level of mental-health practitioners, akin to a bachelor's of nursing degree.
- **Enable Discovery:** Faculty and student will work together in real time to continually inform, strengthen, and expand the body of research in this important field.

When fully operational, the academic program will graduate at least 200 behavioral health practitioners each year who can deliver services for children and families across a broad spectrum of settings including schools, doctors' offices, and social services agencies.

**“Mental health challenges in children, adolescents, and young adults are real and widespread. Even before the pandemic, an alarming number of young people struggled with feelings of helplessness, depression, and thoughts of suicide... The future wellbeing of our country depends on how we support and invest in the next generation.”**

Vivek H. Murthy, M.D.,  
Surgeon General of the  
United States  
December 7, 2021

**These professionals will be steeped in evidence-based clinical skills, knowledgeable about community resources and cultures, and will be trained by highly skilled behavioral health practitioners and scientists.**



**The Gift:** This effort is made possible by a lead gift of more than \$425 million from Connie and Steve Ballmer. The gift will:

- Permanently fund the hiring of 25 clinical and tenure track faculty,
- Endow the operations of the institute going forward,
- Provide scholarships to graduate a new, diverse and culturally rich workforce prepared to work directly with those in need, and
- Support the purchase of the former Concordia University campus in NE Portland where the Ballmer Institute will be housed.

To learn more, visit

**CHILDRENSBEHAVIORALHEALTH.UOREGON.EDU**

**The University of Oregon, higher education partners, community organizations and state government will integrate leading-edge research with community support for Oregon's young people, especially those in persistently underserved communities**

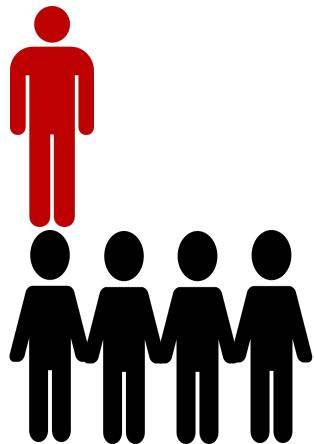


**Randy Kamphaus, Ph.D.**  
Acting Executive Director  
March 2022



The Challenge





**20%**

Of those with needs receive  
care from a specialized  
mental health care provider





UNIVERSITY OF  
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**BALLMER INSTITUTE**

[The Gift](#)

# \$425 M

**Gift from Connie and Steve Ballmer**

First Bachelor's degree program of its kind  
Behavioral Health Specialist

Prepare candidates in the most  
populous area of Oregon  
(Former Concordia University)

Scholarships for Oregon Residents  
to create a diverse workforce

## 10

Tenure-related faculty to expand  
research and development of new innovations

## 15

Clinical faculty to work in schools and  
supervise clinical training of students

# \$100 M

**Endowment for Scholarships**



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**BALLMER INSTITUTE**

[Timeline](#)

Offer professional development  
opportunities for PPS staff

Offer a graduate one year,  
part-time, certificate program

Upon HECC approval,  
enroll the first class of  
200 first year students

2022

2022-2023  
Academic Year

Fall  
2023



## **Agenda Item #3.2**

### **Concordia Campus Real Estate Transaction**

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Under the Policy on the Retention and Delegation of Authority, at para. 1.7.2, the Board of Trustees (Board) must approve the execution of all instruments relating to real property with an anticipated cost or value in excess of \$5 million. The Board is asked to consider approval of the purchase of the real estate as well as associated personal property in northeast Portland, namely the campus that previously had been owned and operated by Concordia University, Portland. A purchase and sale agreement, agreed to subject to the approval of the Board, sets the purchase price for the real estate and its contents at \$60.5 million.

Concordia University Portland began operation in 1905 as a high school affiliated with the Lutheran Church. Over the course of the following 115 years, the campus grew in operation into a private religious university on a campus in a neighborhood referred to as "Concordia" due to the proximity of the school. The campus includes 23 buildings, involving approximately 400,000 square feet on over 19 acres. Included on the property are classroom buildings, faculty offices, a recently constructed library, a recently renovated athletic facility with a turf field and seating for 1,775 spectators, a gymnasium, cafeteria, student center, administrative building, two residential homes and 513 beds in on-campus residential housing. Included with the real estate is the bulk of the buildings' contents, from desks and chairs, to computer equipment, to musical instruments and weight room equipment, to baseball uniforms, to library stacks full of books, including their special collections. We anticipate that many of these items will have value to the University of Oregon, while some of the furnishings, fixtures and equipment will need to be liquidated. A prospectus, prepared by the seller's real estate broker for the purpose of marketing the property, is attached.

#### *The Purchase*

The University of Oregon, with the help of a real estate broker and real estate counsel, negotiated for the purchase of the campus and its contents after consulting with an experienced real estate appraiser. The agreed-to purchase price is susceptible to some renegotiation should the University, in exercising its due diligence on the property, discover major issues impacting the condition of the property or title that were previously unknown to us. Our due diligence has just commenced and will examine in some depth the condition of the buildings and their mechanical, electrical and other systems. Our due diligence will also include detailed review of any as yet unanalyzed issues on title as well as analysis of environmental, zoning or regulatory issues related to the multiple tax parcels included in the sale. We have 90 days to complete this due diligence. Once complete, if satisfactory, we will be in a position to close on the sale and take ownership and possession. If all remains on track, closing should take place in the second week of June.

#### *Known Issues on Title*

As has been widely reported, the property has been subject to a "lis pendens" or a notice to any potential buyer, that there is "litigation pending" that might impact the property. That litigation involves a lawsuit brought by HotChalk, a vendor that provided online services to Concordia. HotChalk claims that Concordia breached its contract and is seeking recovery of over \$300 million from Concordia, as well as the Lutheran Church Extension Fund (the current owner of the campus) and the Lutheran Church Missouri Synod. The basis for HotChalk's notice on title is their allegation that LCEF engaged in a

“fraudulent transfer” when it obtained title to the campus pursuant to a trust deed recorded in 2020 and a foreclosure on that trust deed in 2021.

The University is taking no position in that litigation with respect to the merits of the contract dispute, though we share the conclusion reached by LCEF that there was no fraudulent transfer of the property. Moreover, we are satisfied LCEF has resources well in excess of any potential judgment in that litigation such that HotChalk would have no legitimate need to disrupt our ownership in order to receive full payment on such judgment. That said, the purchase agreement contains additional protections from LCEF that the University’s legal counsel concludes are sufficient to substantially protect our interests in this purchase.

In addition to the lis pendens, there exists an interest in the property belonging to the Lutheran Church Missouri Synod known as a right of reentry. In essence, this interest entitles the Missouri Synod to take title to the property at its election should the property be used for a purpose other than as a religious or educational institution affiliated with the Lutheran Church. As a condition of this sale, LCEF is required to reach agreement with the Missouri Synod to extinguish that right of reentry. Should for any reason LCEF fail in doing so, the University will not purchase the property.

#### *Funding*

The purchase of the campus, as well as the costs associated with due diligence and those renovations that will be reasonably necessary to make the campus operational for the University’s needs, are fully funded by the gift made by Connie and Steve Ballmer.

#### *Trustee Authorization Required*

As an express condition of the sale, the Board of Trustees for the University of Oregon’s approval is needed by March 25, 2022. If the Board declines to authorize the purchase, the sale will not go through. Board authority is therefore sought, and a resolution is before the Board allowing the University to take those steps necessary to consummate this purchase.



## Concordia Campus Real Estate Acquisition

**Kevin S. Reed**

Vice President and General Counsel  
March 2022

**Kelly M. Walsh**

Shareholder  
Schwabe, Williamson & Wyatt

**Jane Gordon**

Vice Provost  
UO Portland





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## CAMPUS HIGHLIGHTS



395,346± SF campus on 19± acres  
with over 235,400± SF of learning &  
administrative spaces



475± parking spaces spread throughout the campus



513 beds of student housing on campus



On-site cafeteria with seating area in Hagen Campus Center



1,775 seat state-of-the-art stadium with baseball diamond and soccer field built in 2011



Lush green space with amphitheater & bell tower in the middle of campus



33,500± SF gymnasium with locker rooms and offices



Served by Trimet bus lines 17 & 75,  
both within a block of campus



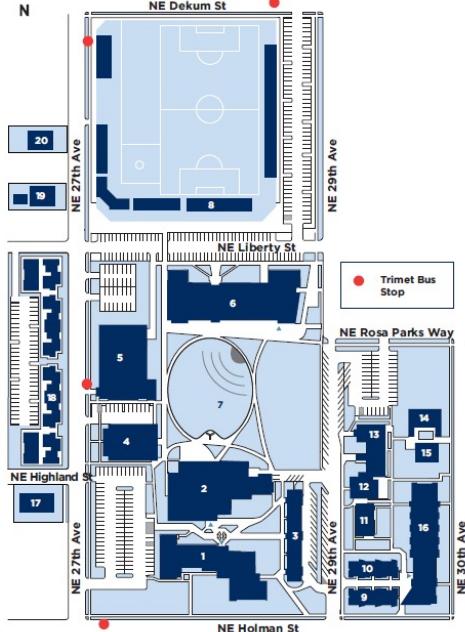
73,000± SF LEED Gold-rated library  
with café built in 2008



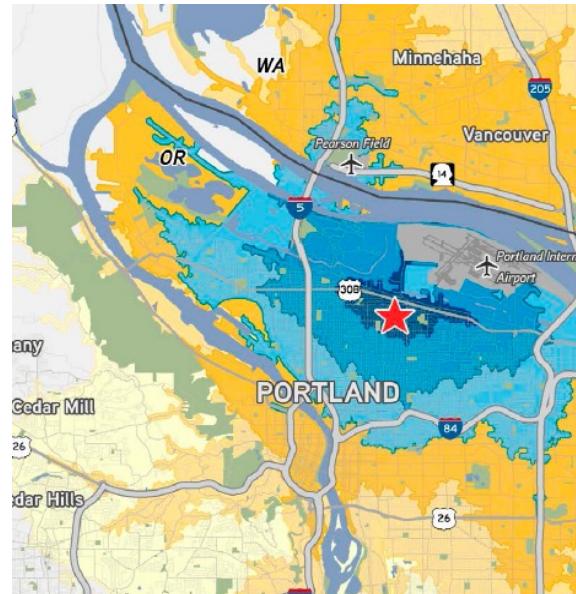
Easy access to Hwy 30, I-5, I-205, and  
Portland International Airport



Total Campus, including two residential homes and recently refurbished athletic complex is approximately 19 acres.



The Campus is located in NE Portland, in the Concordia Neighborhood (so named due to the prior school's operation there since 1905)



Portland Public School's Faubion School is located immediately adjacent to the campus.

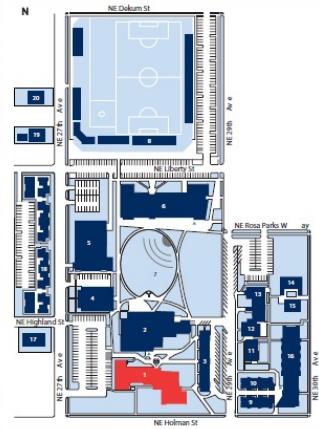




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## Luther Hall

Classrooms, Offices,  
Labs



Luther Hall was one of the first brick and mortar structures on site. The building is stacked with three usable levels. The functions served in this building include the Business Office, Registrar, Admissions, Financial Aid, Provost, General Classrooms and Science Labs. Building contains approximately 20 classrooms (30 student capacity), several laboratories, storage area, and large lecture hall that seats 168 students.

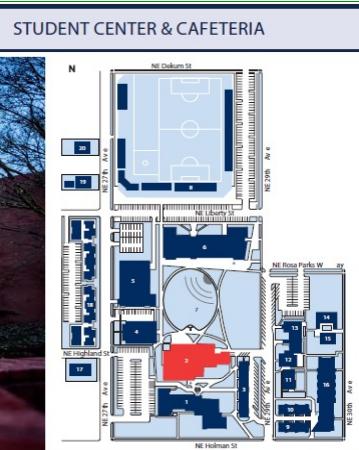
Year Built:  
1947, w/additions  
in 1951, 1993

Size:  
42,750± SF



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## Student Center with dining hall and kitchen



Hagen Center was originally a smaller 16,000 SF building named Guild Hall constructed in 1953. The building has two main functions. The 1st floor is a dining area with a supporting kitchen. The Student Centers occupy a portion of the first floor as well, but most of the old library space was on the upper level. There is 7,600 SF of open multipurpose area with the remaining of the 2nd floor being computer labs, recreation areas, lounges, and offices.

Year Built:  
1953, with an  
addition in 1980

Size:  
32,000± SF



Library  
Recently  
constructed,  
with  
classrooms,  
faculty offices  
and a small  
café.

6	GEORGE R WHITE LIBRARY & LEARNING CENTER	LIBRARY
<p>The George R White Library &amp; Learning Center is a 73,000 SF, LEED Gold-rated building that has the library as its core and is bookended by classrooms and offices. There are classrooms on the third level that have raised floors to allow for flexibility of wiring, both line voltage and data. The classrooms have power outlets in the floor to allow for lap-top powering and data plug-ins. They also have Smart Boards and other multi-media teaching aids. The building has 12 classrooms, 10 small study group rooms, 33 faculty offices, 4 conference/instructional rooms, and a small café.</p>	Year Built: 2008	Size: 73,000± SF



Athletic field  
with 1,775-seat  
stadium, with locker  
rooms, enclosed  
batting cage.  
Historically used by  
numerous  
community groups.

8	HILKEN COMMUNITY STADIUM	SEATS 1,775	SPORTS STADIUM
<p>The Hilken Community Stadium has the latest in synthetic turf technologies for quality of play all year and sports lighting that extends playing hours. It includes a small out-building for team rooms, a training room, a large enclosed batting practice area, restrooms, and excellent grandstands for spectators. The facility is designed so that each sport, baseball and soccer, has its own entrance that separates the activities and ensures seating with optimal visibility for all who attend.</p>	Year Built: 2011	Size: 19,322± SF	



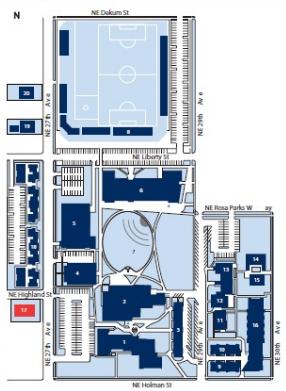
## Six different residential housing complexes with over 500 beds

16	EAST HALL	186 BEDS	STUDENT HOUSING
	 Built in 1998, East Hall is Concordia's largest residence hall at approximately 51,290 SF, housing roughly 200 students in single rooms, double rooms, triple rooms, quad rooms, and apartments. The double rooms are suite-style spaces with two double rooms connected by a shared bathroom. The few singles in East Hall have a private bathroom. The triple and quad rooms are large rooms shared by 3-4 students with private bathrooms with bathtubs and large walk-in closets. Each room has an extra-long twin bed, desk, dresser, bookshelf for each resident and mini-fridge with microwave for the room to share.	Year Built: 1998	Size: 51,290± SF



18	CONCORDIA PLACE APARTMENTS	109 BEDS	STUDENT HOUSING
	 Concordia Place Apartments were built in 2008 as a 109-person resident hall with 53 apartments. The project is a four-building, three-level apartment-style residence, with each apartment equipped with a full kitchen, air conditioning and private bedrooms. Concordia Place Apartments includes a commons area with a laundry facility in one of the buildings, a community room and plenty of indoor bike storage.	Year Built: 2008	Size: 52,611± SF

## Administrative Offices

(17)	CONCORDIA HOUSE	6385 NE 27TH	EXECUTIVE OFFICES
			
Built in 2017 as executive office space and is wheelchair accessible via a ramp on the north side of the building. Located on a 7,400 SF lot. The Alberta Arts District is located in the Concordia neighborhood and provides the area with abundant shopping and dining opportunities.			
		Year Built: 2017	Size: 5,729± SF

## Basic Deal Points:

- Agreed-to purchase price of \$60.5M – value supported by opinion of an expert appraiser
- Title to the multiple parcels comprising the campus to be taken by the University of Oregon through a Statutory Bargain and Sale Deed
- Sale includes contents and furnishings in the buildings (exclusive of religious art and artifacts)
- Sale contingent on approval by the UO Board of Trustees
- Sale further contingent on extinguishment of a “right of re-entry” held by the Lutheran Church Missouri Synod
- Threat to title noted by “lis pendens” on the property subject to robust indemnity from seller
- UO has already commenced its “due diligence” concerning the property, and are examining physical plant, mechanical, electrical, and other systems as well as all title issues
- Full survey of the property underway
- Current schedule anticipates closing in second week of June 2022



**Board of Trustees of the University of Oregon**

**Resolution: Authorization for Real Estate Transaction (Concordia Campus)**

WHEREAS, the United State Surgeon General has declared the issues of behavioral health in children a national crisis;

WHEREAS, the university has launched the Ballmer Institute for Children's Behavioral Health at the University of Oregon, an innovative approach to addressing behavioral health in children that leverages the university's unique strengths in research and teaching to help address the problem;

WHEREAS, the Ballmer Institute will be based in the Portland metro region to better serve the state's most populous and diverse region;

WHEREAS, the property formerly owned and operated by Concordia University in northeast Portland provides space and facilities to house the institute, maintains a unique partnership with the local public school, and provides opportunities to serve the university's larger needs in Portland;

WHEREAS, the Concordia College campus and associated personal property has a purchase price of \$60,500,000 million, which is funded entirely by a philanthropic gift from Connie and Steve Ballmer;

WHEREAS, Board of Trustees' approval is required for the execution of instruments where the anticipated cost or value to the university exceeds \$5 million in total cost.

NOW, THEREFORE, the Board of Trustees of the University of Oregon hereby authorizes the university to purchase real estate as well as associated personal property in northeast Portland, namely the campus that previously had been owned and operated by Concordia University, and as described in Exhibit A of the accompanying board documents.

Moved: \_\_\_\_\_ Seconded: \_\_\_\_\_

Record here if voice vote taken without calling roll: \_\_\_\_\_

Trustee	Vote	Trustee	Vote
Aaron		Lillis	
Boyle		Lo	
Evans Jackman		Madison	
Fick		Murray	
Holwerda		Seeley	
Hornecker		Ralph	
Kari		Worden	

Dated: \_\_\_\_\_ Initials: \_\_\_\_\_

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## **Agenda Item #4**

### **Finance & Treasury**

## Finance Summary: Education and General Qtr2 FY2022

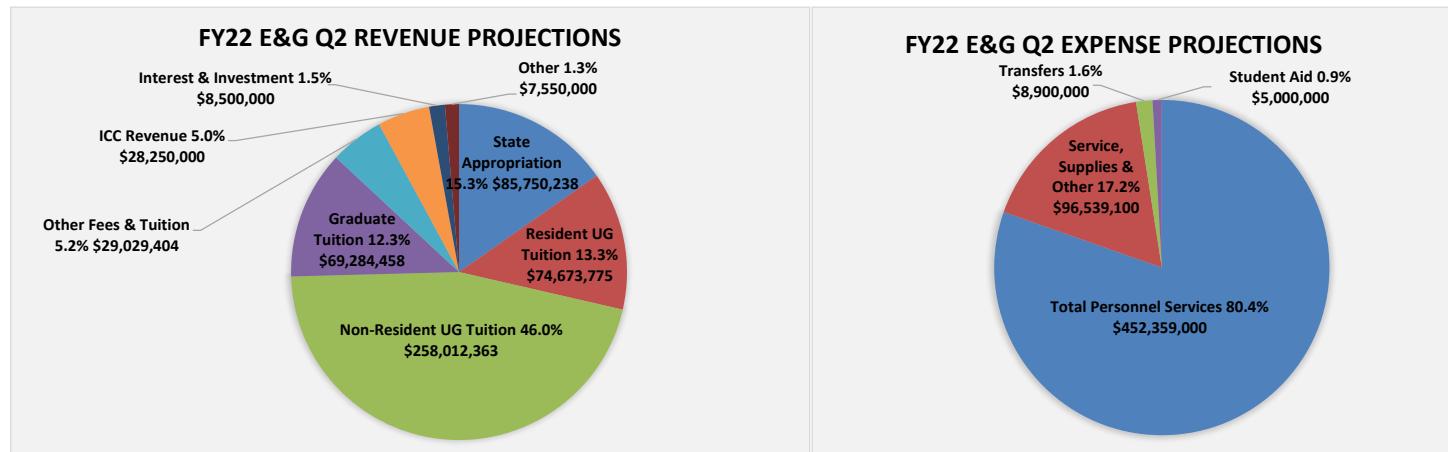
### CFO's Key Takeaways

- Projected tuition and fee revenue up due to strong winter enrollment
- Small, entering first-year class from Fall 2020 will continue to negatively impact E&G fund finances for the next three years
- Compensation costs down significantly due to unprecedented level of vacant positions. Costs are expected to increase throughout the year as vacancies are filled and annual salary increases are implemented
- Updated Q2 projection shows an estimated gain of \$10.6M, prior to HEERF lost tuition funding. This compares to Q1 projected shortfall of \$3.6M
- Projected year end fund balance for FY22 is \$71.9M without HEERF lost tuition funding (6.4 weeks of operating expenses) and \$90.6M with HEERF lost tuition funding (8.1 weeks of operating expenses)

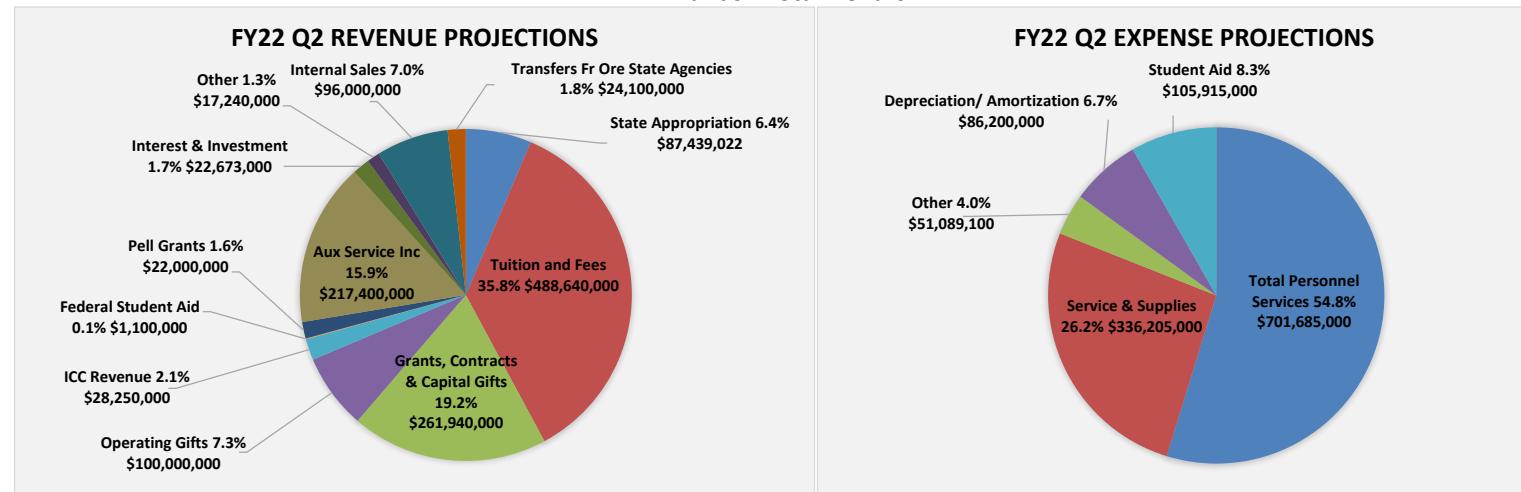
### Education and General Fund Qtr2 - Projection Status

Category	FY22 Q1	FY22 Q2 Revised	FY22 Q1	FY22 Q2	Projection	Revised Q2	Notes
	Projection	Projection	Projection vs FY21 Act	Actuals vs FY21 Q2	Adjustment	Proj vs FY21	
State Appropriation	\$85,750,238	\$85,750,238	3.7%	4.5%	Unchanged	3.7%	
Tuition and Fees	\$436,500,000	\$439,500,000	5.8%	6.5%	Up	6.5%	• Projected tuition and fee revenue up due to strong winter enrollment
ICC Revenue	\$28,250,000	\$28,250,000	8.9%	9.6%	Unchanged	8.9%	• Projection based on grant activity as COVID restrictions have eased and more research personnel are on campus
Personnel Services	\$452,359,000	\$443,400,000	3.3%	-4.8%	Down	1.3%	• Compensation costs down significantly due to unprecedented level of vacant positions. Costs are expected to increase throughout the year as vacancies are filled and annual salary increases are implemented
Service & Supplies	\$112,600,000	\$112,600,000	20.3%	19.0%	Unchanged	20.3%	
Student Aid	\$6,765,000	\$5,000,000	43.6%	-23.8%	Down	6.2%	• Reduced due to identification of projection error. Adjusted to historical levels

### Education & General Funds - Total Dollars



### All Funds - Total Dollars



Student Aid Expense does not include \$60.3M of fee remissions awarded to students. Remissions are booked as negative revenue.

Capital Expenditures not included

## FY21 Actuals Quarter 4 Report

	All Funds except Agency and Clearing											Year-End Reporting Adj.	Total	
	Designated Ops				Restricted Gift					Internal Bank				
	Education and General	and Service Center	Auxiliaries	Grant Funds	Funds	Other Funds	Plant Funds	Total						
State Appropriation	\$ 82,720,112	\$ 1,170,784	\$ 509,861	\$ 69,513	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 84,470,270		
Tuition and Fees	\$ 412,655,803	\$ 1,033,188	\$ 41,172,364	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,022,576	\$ 457,883,932			
Gifts Grants & Contracts	\$ 382,053	\$ 3,588,242	\$ 543,572	\$ 168,363,005	\$ 129,645,981	\$ -	\$ 24,913,327	\$ -	\$ -	\$ -	\$ 327,436,180			
ICC Revenue	\$ 25,952,583	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 25,952,583		
Federal Student Aid	\$ -	\$ -	\$ -	\$ 23,374,536	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 23,374,536		
Interest and Investment	\$ 7,814,418	\$ 11,495,665	\$ 404,400	\$ 10,410	\$ 2,463	\$ 98,045	\$ 716,810	\$ 20,135,621	\$ -	\$ 40,677,832				
Internal Sales	\$ 695,105	\$ 52,839,550	\$ 19,642,431	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 37,746,798	\$ 110,923,883				
Sales & Services	\$ 2,839,650	\$ 6,489,874	\$ 89,720,394	\$ 4,386,207	\$ -	\$ -	\$ 27,598	\$ -	\$ -	\$ 103,463,722				
Other Revenues	\$ 2,051,191	\$ 633,490	\$ 3,290,912	\$ -	\$ -	\$ -	\$ 6,986,422	\$ -	\$ -	\$ 12,962,015				
Transfers From Ore State Agencies	\$ -	\$ -	\$ -	\$ 9,587,573	\$ -	\$ -	\$ 13,680,498	\$ -	\$ -	\$ 23,268,071				
<b>Total Revenue</b>	<b>\$ 535,110,914</b>	<b>\$ 77,250,793</b>	<b>\$ 155,283,934</b>	<b>\$ 205,791,244</b>	<b>\$ 129,648,444</b>	<b>\$ 98,045</b>	<b>\$ 46,324,655</b>	<b>\$ 60,904,995</b>	<b>\$ 1,210,413,024</b>					
<b>Total Personnel Services</b>	<b>\$ 437,853,844</b>	<b>\$ 36,254,010</b>	<b>\$ 63,933,713</b>	<b>\$ 75,893,110</b>	<b>\$ 53,236,226</b>	<b>\$ -</b>	<b>\$ 13,100</b>	<b>\$ 357,131</b>	<b>\$ 667,541,135</b>					
Service & Supplies	\$ 93,626,145	\$ 14,656,601	\$ 70,389,188	\$ 31,791,431	\$ 31,335,654	\$ (64,910)	\$ 7,226,059	\$ 45,329,364	\$ 294,289,532					
Merchandise-Resale/Redistribution	\$ (1,258)	\$ 16,381,333	\$ 5,090,387	\$ -	\$ 94	\$ -	\$ -	\$ -	\$ -	\$ 21,470,556				
Internal Sales Reimbursements	\$ (12,746,608)	\$ (162,500)	\$ (624,135)	\$ (29,400)	\$ (14,895)	\$ -	\$ (203,510)	\$ -	\$ -	\$ (13,781,047)				
Indirect Costs	\$ 5,959	\$ 2,554,247	\$ 4,691,866	\$ 26,118,564	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 33,370,637				
Depreciation/Amortization Expense	\$ -	\$ 4,147,162	\$ 41,247,910	\$ -	\$ -	\$ -	\$ 38,036,959	\$ -	\$ -	\$ 83,432,032				
Student Aid	\$ 4,709,505	\$ 1,482,163	\$ 1,716,181	\$ 50,847,289	\$ 34,119,363	\$ 72,157	\$ -	\$ -	\$ -	\$ 92,946,658				
<b>Total General Expense</b>	<b>\$ 85,593,744</b>	<b>\$ 39,059,006</b>	<b>\$ 122,511,398</b>	<b>\$ 108,727,884</b>	<b>\$ 65,440,215</b>	<b>\$ 7,247</b>	<b>\$ 45,059,508</b>	<b>\$ 45,329,364</b>	<b>\$ 511,728,367</b>					
<b>Net Transfers Out/(In)</b>	<b>\$ 3,348,942</b>	<b>\$ (780,253)</b>	<b>\$ (1,650,026)</b>	<b>\$ 3,820,305</b>	<b>\$ 3,244,491</b>	<b>\$ 125,116</b>	<b>\$ (11,248,076)</b>	<b>\$ 3,139,501</b>	<b>\$ -</b>					
<b>Total Expense</b>	<b>\$ 526,796,531</b>	<b>\$ 74,532,764</b>	<b>\$ 184,795,085</b>	<b>\$ 188,441,300</b>	<b>\$ 121,920,932</b>	<b>\$ 132,363</b>	<b>\$ 33,824,531</b>	<b>\$ 48,825,997</b>	<b>\$ 1,179,269,502</b>					
<b>Net before CapEx</b>	<b>\$ 8,314,383</b>	<b>\$ 2,718,029</b>	<b>\$ (29,511,150)</b>	<b>\$ 17,349,944</b>	<b>\$ 7,727,512</b>	<b>\$ (34,317)</b>	<b>\$ 12,500,124</b>	<b>\$ 12,078,998</b>	<b>\$ 31,143,522</b>					
<b>Beginning Fund Balance</b>	<b>\$ 54,401,248</b>	<b>\$ 56,442,780</b>	<b>\$ 593,302,661</b>	<b>\$ (1,136,654)</b>	<b>\$ 26,892,415</b>	<b>\$ 5,561,403</b>	<b>\$ 770,849,969</b>	<b>\$ 50,163,036</b>	<b>\$ 1,556,476,859</b>					
<b>Capital Expenditures</b>	<b>\$ (3,791,094)</b>	<b>\$ (196,299)</b>	<b>\$ (17,065)</b>	<b>\$ (4,840,426)</b>	<b>\$ (6,832,521)</b>	<b>\$ -</b>	<b>\$ (129,398,326)</b>	<b>\$ -</b>	<b>\$ (145,075,730)</b>					
<b>Net (from above)</b>	<b>\$ 8,314,383</b>	<b>\$ 2,718,029</b>	<b>\$ (29,511,150)</b>	<b>\$ 17,349,944</b>	<b>\$ 7,727,512</b>	<b>\$ (34,317)</b>	<b>\$ 12,500,124</b>	<b>\$ 12,078,998</b>	<b>\$ 31,143,522</b>					
<b>Fund Additions/Deductions*</b>	<b>\$ (118,991)</b>	<b>\$ (3,831,218)</b>	<b>\$ 41,152,706</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 107,984,193</b>	<b>\$ -</b>	<b>\$ 145,186,689</b>	<b>\$ (317,106,539)</b>				
<b>Retirement Incentive Program One-time Expenses</b>	<b>\$ (6,139,934)</b>	<b>\$ -</b>	<b>\$ (460,418)</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ (6,600,352)</b>				
<b>Federal COVID-19 Relief One-Time Funds</b>	<b>\$ 6,458,995</b>	<b>\$ 980,000</b>	<b>\$ 4,970,543</b>	<b>\$ (12,409,538)</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>				
<b>Ending Fund Balance</b>	<b>\$ 59,124,607</b>	<b>\$ 56,113,292</b>	<b>\$ 609,437,277</b>	<b>\$ (1,036,674)</b>	<b>\$ 27,787,406</b>	<b>\$ 5,527,086</b>	<b>\$ 761,935,960</b>	<b>\$ 62,242,034</b>	<b>\$ 1,581,130,989</b>	<b>\$ (317,106,539)</b>	<b>\$ 1,264,024,449</b>			
<b>Year-End Accounting Entries</b>	<b>\$ 2,160,869</b>	<b>\$ 174,669</b>	<b>\$ 518,139</b>	<b>\$ 279,923</b>	<b>\$ 309,574</b>	<b>\$ -</b>	<b>\$ 2,485</b>	<b>\$ 3,445,660</b>						
<b>Adjusted Ending Fund Balance</b>	<b>\$ 61,285,476</b>	<b>\$ 56,287,961</b>	<b>\$ 609,955,416</b>	<b>\$ (756,751)</b>	<b>\$ 28,096,981</b>	<b>\$ 5,527,086</b>	<b>\$ 761,935,960</b>	<b>\$ 62,244,519</b>	<b>\$ 1,584,576,649</b>	<b>\$ (317,106,539)</b>	<b>\$ 1,267,470,108</b>			
<b>Net Capital Assets</b>	<b>\$ -</b>	<b>\$ 25,013,022</b>	<b>\$ 573,645,015</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 687,997,926</b>	<b>\$ (20,916,488)</b>	<b>\$ 1,265,739,475</b>					
<b>Other Restricted Net Assets</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ (756,751)</b>	<b>\$ 28,096,981</b>	<b>\$ 5,527,086</b>	<b>\$ 59,407,762</b>	<b>\$ -</b>	<b>\$ 92,275,079</b>	<b>\$ (2,221,997)</b>	<b>\$ 90,053,081</b>			
<b>Unrestricted Net Assets</b>	<b>\$ 61,285,474</b>	<b>\$ 31,274,939</b>	<b>\$ 36,310,401</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 14,530,272</b>	<b>\$ 83,161,007</b>	<b>\$ 226,562,093</b>	<b>\$ (314,884,542)</b>	<b>\$ (88,322,448)</b>			
<b>Total Net Assets</b>	<b>\$ 61,285,474</b>	<b>\$ 56,287,961</b>	<b>\$ 609,955,416</b>	<b>\$ (756,751)</b>	<b>\$ 28,096,981</b>	<b>\$ 5,527,086</b>	<b>\$ 761,935,960</b>	<b>\$ 62,244,519</b>	<b>\$ 1,584,576,647</b>	<b>\$ (317,106,539)</b>	<b>\$ 1,267,470,108</b>			

\* - Due to Capital Improvements and Debt Accounting entries

## Notes:

- Unrestricted Net Assets in Plant Funds are Capital Renewal/Replacement monies.
- In the Internal Bank Funds, Unrestricted Net Assets include primarily unrealized and realized gains in the investment portfolio, unspent bond proceeds, and funds collected to meet obligations of the Student Building Fee debt pool and other long-term obligations. This number will grow increasingly positive as the principal payment dates on UO revenue bonds get closer.
- Year-End Reporting Adjustments column includes items such as Pension Liability (GASB68), OPEB Liability (GASB75), SLGRP Pool Liability, and Agency/Fiduciary Funds.

FY22 Updated Projection - All Funds except Agency and Clearing

	Designated Ops										Total	
	Education and General		Center		Auxiliaries		Grant Funds		Restricted Gift Funds			
	Education	General	Center	Auxiliaries	Grant	Funds	Other	Funds	Plant	Internal		
State Appropriation	\$ 85,750,238	\$ 1,170,784	\$ 450,000	\$ 68,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 87,439,022	
Tuition and Fees	\$ 439,500,000	\$ 1,200,000	\$ 44,940,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,000,000	\$ 488,640,000		
Gifts Grants & Contracts	\$ 400,000	\$ 2,500,000	\$ -	\$ 187,700,000	\$ 100,000,000	\$ -	\$ -	\$ 71,340,000	\$ -	\$ -	\$ 361,940,000	
ICC Revenue	\$ 28,250,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 28,250,000	
Federal Student Aid	\$ -	\$ -	\$ -	\$ 23,100,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 23,100,000	
Interest and Investment	\$ 8,500,000	\$ 12,500,000	\$ 113,000	\$ -	\$ 710,000	\$ 100,000	\$ -	\$ 750,000	\$ -	\$ -	\$ 22,673,000	
Internal Sales	\$ 900,000	\$ 55,000,000	\$ 18,200,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 40,100,000	\$ -	\$ 114,200,000	
Sales & Services	\$ 4,000,000	\$ 8,200,000	\$ 195,200,000	\$ 1,500,000	\$ 440,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 209,340,000	
Other Revenues	\$ 2,250,000	\$ 850,000	\$ 4,000,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 7,100,000	
Transfers From Ore State Agencies	\$ -	\$ -	\$ -	\$ 10,100,000	\$ -	\$ -	\$ -	\$ 14,000,000	\$ -	\$ -	\$ 24,100,000	
<b>Total Revenue</b>	<b>\$ 569,550,238</b>	<b>\$ 81,420,784</b>	<b>\$ 262,903,000</b>	<b>\$ 222,468,000</b>	<b>\$ 101,150,000</b>	<b>\$ 100,000</b>	<b>\$ 85,340,000</b>	<b>\$ 43,850,000</b>	<b>\$ 1,366,782,022</b>			
<b>Total Personnel Services</b>	<b>\$ 443,400,000</b>	<b>\$ 38,200,000</b>	<b>\$ 102,900,000</b>	<b>\$ 79,800,000</b>	<b>\$ 37,000,000</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 385,000</b>	<b>\$ -</b>	<b>\$ 701,685,000</b>		
Service & Supplies	\$ 112,600,000	\$ 18,500,000	\$ 110,100,000	\$ 34,700,000	\$ 26,000,000	\$ 5,000	\$ -	\$ 34,300,000	\$ -	\$ 336,205,000		
Merchandise-Resale/Redistribution	\$ 5,100	\$ 16,700,000	\$ 12,100,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 28,805,100		
Internal Sales Reimbursements	\$ (16,100,000)	\$ (50,000)	\$ (820,000)	\$ (30,000)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (17,000,000)		
Indirect Costs	\$ 34,000	\$ 3,000,000	\$ 8,000,000	\$ 28,250,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 39,284,000		
Depreciation/Amortization Expense	\$ -	\$ 4,200,000	\$ 42,000,000	\$ -	\$ -	\$ -	\$ -	\$ 40,000,000	\$ -	\$ 86,200,000		
Student Aid	\$ 5,000,000	\$ 1,700,000	\$ 2,000,000	\$ 59,700,000	\$ 37,500,000	\$ 15,000	\$ -	\$ -	\$ -	\$ 105,915,000		
<b>Total General Expense</b>	<b>\$ 101,539,100</b>	<b>\$ 44,050,000</b>	<b>\$ 173,380,000</b>	<b>\$ 122,620,000</b>	<b>\$ 63,500,000</b>	<b>\$ 20,000</b>	<b>\$ 40,000,000</b>	<b>\$ 34,300,000</b>	<b>\$ 579,409,100</b>			
<b>Net Transfers Out(In)</b>	<b>\$ 8,900,000</b>	<b>\$ (450,000)</b>	<b>\$ (3,500,000)</b>	<b>\$ 2,500,000</b>	<b>\$ 9,000,000</b>	<b>\$ -</b>	<b>\$ (11,800,000)</b>	<b>\$ (4,650,000)</b>	<b>\$ -</b>			
<b>Total Expense</b>	<b>\$ 553,839,100</b>	<b>\$ 81,800,000</b>	<b>\$ 272,780,000</b>	<b>\$ 204,920,000</b>	<b>\$ 109,500,000</b>	<b>\$ 20,000</b>	<b>\$ 28,200,000</b>	<b>\$ 30,035,000</b>	<b>\$ 1,281,094,100</b>			
<b>Net before CapEx</b>	<b>\$ 15,711,138</b>	<b>\$ (379,216)</b>	<b>\$ (9,877,000)</b>	<b>\$ 17,548,000</b>	<b>\$ (8,350,000)</b>	<b>\$ 80,000</b>	<b>\$ 57,140,000</b>	<b>\$ 13,815,000</b>	<b>\$ 85,687,922</b>			
<b>Beginning Fund Balance</b>	<b>\$ 61,285,476</b>	<b>\$ 56,287,961</b>	<b>\$ 609,955,416</b>	<b>\$ (756,751)</b>	<b>\$ 28,096,981</b>	<b>\$ 5,527,086</b>	<b>\$ 761,935,960</b>	<b>\$ 62,244,519</b>	<b>\$ 1,584,576,649</b>			
<b>Capital Expenditures</b>	<b>\$ (5,100,000)</b>	<b>\$ (600,000)</b>	<b>\$ (890,000)</b>	<b>\$ (1,200,000)</b>	<b>\$ (1,700,000)</b>	<b>\$ -</b>	<b>\$ (82,800,000)</b>	<b>\$ -</b>	<b>\$ (92,290,000)</b>			
<b>Net (from above)</b>	<b>\$ 15,711,138</b>	<b>\$ (379,216)</b>	<b>\$ (9,877,000)</b>	<b>\$ 17,548,000</b>	<b>\$ (8,350,000)</b>	<b>\$ 80,000</b>	<b>\$ 57,140,000</b>	<b>\$ 13,815,000</b>	<b>\$ 85,687,922</b>			
<b>Fund Additions/Deductions*</b>	<b>\$ -</b>	<b>\$ 700,000</b>	<b>\$ 3,490,000</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 88,100,000</b>	<b>\$ -</b>	<b>\$ 92,290,000</b>			
<b>Federal COVID-19 Relief One-Time Funds</b>	<b>\$ 18,700,000</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ (18,700,000)</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>			
<b>Ending Fund Balance</b>	<b>\$ 90,596,614</b>	<b>\$ 56,008,745</b>	<b>\$ 602,678,416</b>	<b>\$ (3,108,751)</b>	<b>\$ 18,046,981</b>	<b>\$ 5,607,086</b>	<b>\$ 824,375,960</b>	<b>\$ 76,059,519</b>	<b>\$ 1,670,264,571</b>			
<b>Year-End Accounting Entries **</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>			
<b>Net Capital Assets</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>			
<b>Other Restricted Net Assets</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>			
<b>Unrestricted Net Assets</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>			
<b>Total Net Assets</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>			

\* - Due to Capital Improvements and Debt Accounting entries

\*\* - Year-End Accounting - e.g. Allocate Pension Liability, Reclass Cash to Investments, Allocate Debt

Notes:

- In the Internal Bank Funds, Unrestricted Net Assets include primarily unrealized and realized gains in the investment portfolio, unspent bond proceeds, and funds collected to meet obligations of the Student Building Fee debt pool and other long-term obligations. This number will grow increasingly positive as the principal payment dates on UO revenue bonds get closer.

## FY22 Actuals Q2 Report

All Funds except Agency and Clearing										
	Designated Ops				Restricted Gift					
	Education and General		and Service		Grant Funds	Funds	Other Funds	Plant Funds	Internal Bank	Total
State Appropriation	\$ 51,693,185	\$ 579,149	\$ 265,408	\$ 36,192	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 52,573,934
Tuition and Fees	\$ 298,614,490	\$ 921,035	\$ 30,252,950	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,104,128	\$ 331,892,603
Gifts Grants & Contracts	\$ 137,643	\$ 892,247	\$ -	\$ 82,618,204	\$ 62,458,004	\$ -	\$ 5,001,437	\$ -	\$ -	\$ 151,107,535
ICC Revenue	\$ 14,715,976	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 14,715,976
Federal Student Aid	\$ -	\$ -	\$ -	\$ 14,667,422	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 14,667,422
Interest and Investment	\$ 4,352,897	\$ 8,884,428	\$ 74,945	\$ (12,062)	\$ 346	\$ 51,229	\$ 188,745	\$ (733,180)	\$ 12,807,350	
Internal Sales	\$ 311,082	\$ 26,272,947	\$ 7,949,859	\$ (435)	\$ (2,411)	\$ -	\$ -	\$ 24,998,941	\$ 59,529,983	
Sales & Services	\$ 2,492,827	\$ 4,161,998	\$ 101,619,391	\$ 146,417	\$ -	\$ -	\$ 131,093	\$ -	\$ 108,551,725	
Other Revenues	\$ 692,281	\$ 303,561	\$ 657,605	\$ -	\$ -	\$ -	\$ 13,443	\$ -	\$ 1,666,890	
Transfers From Ore State Agencies	\$ -	\$ -	\$ -	\$ 7,467,552	\$ -	\$ -	\$ 4,620,210	\$ -	\$ 12,087,762	
<b>Total Revenue</b>	<b>\$ 373,010,382</b>	<b>\$ 42,015,364</b>	<b>\$ 140,820,158</b>	<b>\$ 104,923,290</b>	<b>\$ 62,455,940</b>	<b>\$ 51,229</b>	<b>\$ 9,954,927</b>	<b>\$ 26,369,890</b>	<b>\$ 759,601,182</b>	
<b>Total Personnel Services</b>	<b>\$ 189,588,394</b>	<b>\$ 18,786,212</b>	<b>\$ 46,305,580</b>	<b>\$ 41,076,977</b>	<b>\$ 19,200,793</b>	<b>\$ -</b>	<b>\$ 6,545</b>	<b>\$ 176,035</b>	<b>\$ 315,140,536</b>	
Service & Supplies	\$ 57,284,463	\$ 8,316,776	\$ 50,127,595	\$ 14,076,602	\$ 15,691,649	\$ 962	\$ 8,493,413	\$ 5,142,340	\$ 159,133,800	
Merchandise-Resale/Redistribution	\$ (119,732)	\$ 7,678,031	\$ 5,152,452	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 12,710,751	
Internal Sales Reimbursements	\$ (7,588,564)	\$ (41,603)	\$ (748,896)	\$ (33,999)	\$ -	\$ -	\$ (3,822,467)	\$ -	\$ (12,235,528)	
Indirect Costs	\$ 3,402	\$ 1,302,516	\$ 3,566,920	\$ 14,867,959	\$ -	\$ -	\$ -	\$ -	\$ 19,740,797	
Depreciation/Amortization Expense	\$ -	\$ 2,021,761	\$ 21,323,887	\$ -	\$ -	\$ -	\$ 21,238,057	\$ -	\$ 44,583,705	
Student Aid	\$ 2,076,663	\$ 178,352	\$ 1,538,221	\$ 31,959,896	\$ 19,902,202	\$ 6,398	\$ -	\$ -	\$ 55,661,731	
<b>Total General Expense</b>	<b>\$ 51,656,232</b>	<b>\$ 19,455,833</b>	<b>\$ 80,960,178</b>	<b>\$ 60,870,458</b>	<b>\$ 35,593,851</b>	<b>\$ 7,360</b>	<b>\$ 25,909,003</b>	<b>\$ 5,142,340</b>	<b>\$ 279,595,256</b>	
<b>Net Transfers Out/(In)</b>	<b>\$ 2,502,405</b>	<b>\$ 12,485</b>	<b>\$ (4,537,279)</b>	<b>\$ 2,506,393</b>	<b>\$ 8,578,334</b>	<b>\$ -</b>	<b>\$ (9,632,583)</b>	<b>\$ 570,245</b>	<b>\$ -</b>	
<b>Total Expense</b>	<b>\$ 243,747,031</b>	<b>\$ 38,254,530</b>	<b>\$ 122,728,478</b>	<b>\$ 104,453,828</b>	<b>\$ 63,372,978</b>	<b>\$ 7,360</b>	<b>\$ 16,282,965</b>	<b>\$ 5,888,621</b>	<b>\$ 594,735,792</b>	
<b>Net before CapEx</b>	<b>\$ 129,263,351</b>	<b>\$ 3,760,834</b>	<b>\$ 18,091,680</b>	<b>\$ 469,463</b>	<b>\$ (917,038)</b>	<b>\$ 43,870</b>	<b>\$ (6,328,038)</b>	<b>\$ 20,481,269</b>	<b>\$ 164,865,390</b>	
<b>Beginning Fund Balance</b>	<b>\$ 61,285,476</b>	<b>\$ 56,287,961</b>	<b>\$ 609,955,416</b>	<b>\$ (756,751)</b>	<b>\$ 28,096,981</b>	<b>\$ 5,527,086</b>	<b>\$ 761,935,960</b>	<b>\$ 62,244,519</b>	<b>\$ 1,584,576,649</b>	
<b>Capital Expenditures</b>	<b>\$ (1,958,542)</b>	<b>\$ (85,782)</b>	<b>\$ (701,731)</b>	<b>\$ (678,496)</b>	<b>\$ (1,383,575)</b>	<b>\$ -</b>	<b>\$ (24,662,140)</b>	<b>\$ -</b>	<b>\$ (29,470,265)</b>	
<b>Net (from above)</b>	<b>\$ 129,263,351</b>	<b>\$ 3,760,834</b>	<b>\$ 18,091,680</b>	<b>\$ 469,463</b>	<b>\$ (917,038)</b>	<b>\$ 43,870</b>	<b>\$ (6,328,038)</b>	<b>\$ 20,481,269</b>	<b>\$ 164,865,390</b>	
<b>Fund Additions/Deductions*</b>	<b>\$ -</b>	<b>\$ 885,228</b>	<b>\$ 1,372,943</b>	<b>\$ -</b>	<b>\$ (1,573,366)</b>	<b>\$ -</b>	<b>\$ 3,528,867</b>	<b>\$ -</b>	<b>\$ 4,213,672</b>	
<b>Federal COVID-19 Relief One-Time Funds</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
<b>Ending Fund Balance</b>	<b>\$ 188,590,285</b>	<b>\$ 60,848,242</b>	<b>\$ 628,718,308</b>	<b>\$ (965,784)</b>	<b>\$ 24,223,002</b>	<b>\$ 5,570,956</b>	<b>\$ 734,474,649</b>	<b>\$ 82,725,788</b>	<b>\$ 1,724,185,446</b>	
<b>Year-End Accounting Entries **</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	
<b>Net Capital Assets</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	
<b>Other Restricted Net Assets</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	
<b>Unrestricted Net Assets</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	
<b>Total Net Assets</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	

\* - Due to Capital Improvements and Debt Accounting entries, Includes Elimination of State Paid Debt from UO Books

\*\* - Year-End Accounting - e.g. Allocate Pension Liability, Reclass Cash to Investments, Allocate Debt

## Notes:

- In the Internal Bank Funds, Unrestricted Net Assets include primarily unrealized and realized gains in the investment portfolio, unspent bond proceeds, and funds collected to meet obligations of the Student Building Fee debt pool and other long-term obligations. This number will grow increasingly positive as the principal payment dates on UO revenue bonds get closer.

## FY22 Actuals Q2 Report

	Education and General										FY22 Updated Proj. vs. FY21 Total as %	FY22 Updated Proj. vs. FY21 Total as %	
	FY22 Updated		Actual as % of		FY22 Q2 inc/(dec) from FY21 Q2		FY21 Total		FY22 Initial Proj. vs FY21 Total as %				
	Proj. Q1	FY22 Actual Q2	Proj.	FY21 Actual Q2	FY21 Q2	Actual	FY21 Total	FY22 Updated Proj. Q2	FY22 Updated Proj. vs. FY21 Total as %				
State Appropriation	\$ 85,750,238	\$ 51,693,185	60.3%	\$ 49,476,359	4.5%	\$ 82,720,112	3.7%	\$ 85,750,238	3.7%				
Tuition and Fees	\$ 436,500,000	\$ 298,614,490	68.4%	\$ 280,379,541	6.5%	\$ 412,655,803	5.8%	\$ 439,500,000	6.5%				
Gifts Grants & Contracts	\$ 400,000	\$ 137,643	34.4%	\$ 153,991	-10.6%	\$ 382,053	4.7%	\$ 400,000	4.7%				
ICC Revenue	\$ 28,250,000	\$ 14,715,976	52.1%	\$ 13,421,243	9.6%	\$ 25,952,583	8.9%	\$ 28,250,000	8.9%				
Federal Student Aid	\$ -	\$ -	-	\$ -	-	\$ -	-	\$ -	-				
Interest and Investment	\$ 7,971,000	\$ 4,352,897	54.6%	\$ 3,581,183	21.5%	\$ 7,814,418	2.0%	\$ 8,500,000	8.8%				
Internal Sales	\$ 900,000	\$ 311,082	34.6%	\$ 247,159	25.9%	\$ 695,105	29.5%	\$ 900,000	29.5%				
Sales & Services	\$ 4,000,000	\$ 2,492,827	62.3%	\$ 1,764,824	41.3%	\$ 2,839,650	40.9%	\$ 4,000,000	40.9%				
Other Revenues	\$ 2,250,000	\$ 692,281	30.8%	\$ 346,548	99.8%	\$ 2,051,191	9.7%	\$ 2,250,000	9.7%				
Transfers From Ore State Agencies	\$ -	\$ -	-	\$ -	-	\$ -	-	\$ -	-				
<b>Total Revenue</b>	<b>\$ 566,021,238</b>	<b>\$ 373,010,382</b>	<b>65.9%</b>	<b>\$ 349,370,848</b>	<b>6.8%</b>	<b>\$ 535,110,914</b>	<b>5.8%</b>	<b>\$ 569,550,238</b>	<b>6.4%</b>				
<b>Total Personnel Services</b>	<b>\$ 452,359,000</b>	<b>\$ 189,588,394</b>	<b>41.9%</b>	<b>\$ 199,222,188</b>	<b>-4.8%</b>	<b>\$ 437,853,844</b>	<b>3.3%</b>	<b>\$ 443,400,000</b>	<b>1.3%</b>				
Service & Supplies	\$ 112,600,000	\$ 57,284,463	50.9%	\$ 48,152,632	18.96%	\$ 93,626,145	20.3%	\$ 112,600,000	20.3%				
Merchandise-Resale/Redistribution	\$ 5,100	\$ (119,732)	-2347.7%	\$ 3,190	-3853.3%	\$ (1,258)	-505.4%	\$ 5,100	-505.4%				
Internal Sales Reimbursements	\$ (16,100,000)	\$ (7,588,564)	47.1%	\$ (5,269,519)	44.0%	\$ (12,746,608)	26.3%	\$ (16,100,000)	26.3%				
Indirect Costs	\$ 34,000	\$ 3,402	10.0%	\$ 3,386	0.5%	\$ 5,959	470.5%	\$ 34,000	470.5%				
Depreciation/Amortization Expense	\$ -	\$ -	-	\$ -	-	\$ -	-	\$ -	-				
Student Aid	\$ 6,765,000	\$ 2,076,663	30.7%	\$ 2,724,363	-23.8%	\$ 4,709,505	43.6%	\$ 5,000,000	6.2%				
<b>Total General Expense</b>	<b>\$ 103,304,100</b>	<b>\$ 51,656,232</b>	<b>50.0%</b>	<b>\$ 45,614,052</b>	<b>13.2%</b>	<b>\$ 85,593,744</b>	<b>20.7%</b>	<b>\$ 101,539,100</b>	<b>18.6%</b>				
<b>Net Transfers Out(In)</b>	<b>\$ 8,900,000</b>	<b>\$ 2,502,405</b>	<b>28.1%</b>	<b>\$ 3,000,074</b>	<b>-16.6%</b>	<b>\$ 3,348,942</b>	<b>165.8%</b>	<b>\$ 8,900,000</b>	<b>165.8%</b>				
<b>Total Expense</b>	<b>\$ 564,563,100</b>	<b>\$ 243,747,031</b>	<b>43.2%</b>	<b>\$ 247,836,315</b>	<b>-1.6%</b>	<b>\$ 526,796,531</b>	<b>7.2%</b>	<b>\$ 553,839,100</b>	<b>5.1%</b>				
<b>Net before CapEx</b>	<b>\$ 1,458,138</b>	<b>\$ 129,263,351</b>	<b>8865.0%</b>	<b>\$ 101,534,534</b>	<b>27.3%</b>	<b>\$ 8,314,383</b>	<b>-82.5%</b>	<b>\$ 15,711,138</b>	<b>89.0%</b>				
<b>Beginning Fund Balance</b>	<b>\$ 61,285,476</b>	<b>\$ 61,285,476</b>	<b>100.0%</b>	<b>\$ 54,401,248</b>	<b>12.7%</b>	<b>\$ 54,401,248</b>	<b>12.7%</b>	<b>\$ 61,285,476</b>	<b>12.7%</b>				
<b>Capital Expenditures</b>	<b>\$ (5,100,000)</b>	<b>\$ (1,958,542)</b>	<b>38.4%</b>	<b>\$ (2,284,687)</b>	<b>-14.3%</b>	<b>\$ (3,791,094)</b>	<b>34.5%</b>	<b>\$ (5,100,000)</b>	<b>34.5%</b>				
<b>Net (from above)</b>	<b>\$ 1,458,138</b>	<b>\$ 129,263,351</b>	<b>8865.0%</b>	<b>\$ 101,534,534</b>	<b>27.3%</b>	<b>\$ 8,314,383</b>	<b>-82.5%</b>	<b>\$ 15,711,138</b>	<b>89.0%</b>				
<b>Fund Additions/Deductions*</b>	<b>\$ -</b>	<b>\$ -</b>	<b>-</b>	<b>\$ 16,086</b>	<b>-100.0%</b>	<b>\$ (118,991)</b>	<b>-100.0%</b>	<b>\$ -</b>	<b>-100.0%</b>				
<b>Retirement Incentive Program One-time Expenses</b>	<b>\$ -</b>	<b>\$ -</b>	<b>-</b>	<b>\$ -</b>	<b>-</b>	<b>\$ (6,139,934)</b>	<b>-100.0%</b>	<b>\$ -</b>	<b>-100.0%</b>				
<b>Federal COVID-19 Relief One-Time Funds</b>	<b>\$ 18,700,000</b>	<b>\$ -</b>	<b>0.0%</b>	<b>\$ -</b>	<b>-</b>	<b>\$ 6,458,995</b>	<b>189.5%</b>	<b>\$ 18,700,000</b>	<b>189.5%</b>				
<b>Ending Fund Balance</b>	<b>\$ 76,343,614</b>	<b>\$ 188,590,285</b>	<b>247.0%</b>	<b>\$ 153,667,181</b>	<b>22.7%</b>	<b>\$ 59,124,607</b>	<b>29.1%</b>	<b>\$ 90,596,614</b>	<b>53.2%</b>				
<b>Year-End Accounting Entries **</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>				
<b>Net Capital Assets</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>				
<b>Other Restricted Net Assets</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>				
<b>Unrestricted Net Assets</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>				
<b>Total Net Assets</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>				

\* - Due to Capital Improvements and Debt Accounting entries

\*\* - Year-End Accounting - e.g. Allocate Pension Liability, Reclass Cash to Investments, Allocate Debt



## FY2022 Q2 Financial Update

**March 2022**

Board of Trustees of the University of Oregon

### **E&G Fund FY2022 Q2 – Key Takeaways**

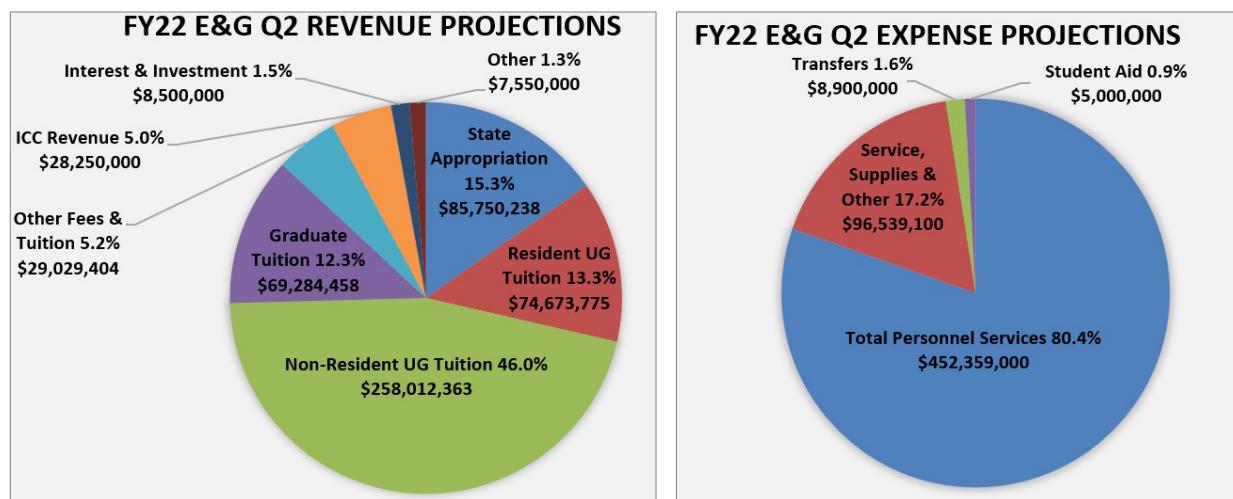
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- Projected tuition and fee revenue up due to strong winter enrollment
- Small, entering first-year class from Fall 2020 will continue to negatively impact E&G fund finances for the next three years
- Compensation costs down significantly due to unprecedented level of vacant positions. Costs are expected to increase throughout the year as vacancies are filled and annual salary increases are implemented
- Updated Q2 projection shows an estimated gain of \$10.6M, prior to HEERF lost tuition funding. This compares to Q1 projected shortfall of \$3.6M
- Projected year end fund balance for FY22 is \$71.9M without HEERF lost tuition funding (6.4 weeks of operating expenses) and \$90.6M with HEERF lost tuition funding (8.1 weeks of operating expenses)

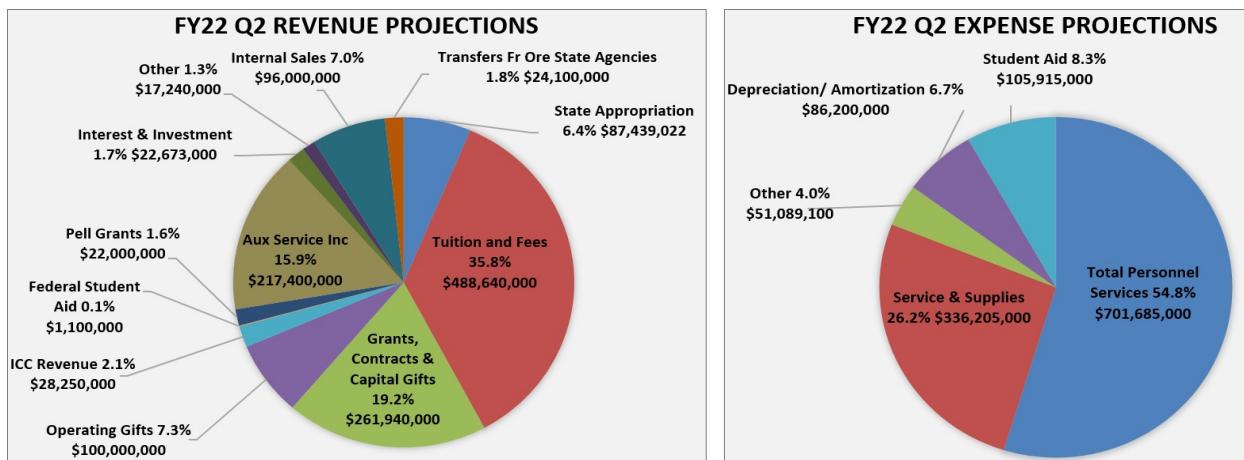
## E&G Fund FY2022 Q2 - Projection Updates

Category	FY22 Q1 Projection	FY22 Q2 Revised Projection	FY22 Q1 Projection vs FY21 Act	FY22 Q2 Actuals vs FY21 Q2	Projection Adjustment	Revised Q2 Proj vs FY21	Notes
State Appropriation	\$85,750,238	\$85,750,238	3.7%	4.5%	Unchanged	3.7%	
Tuition and Fees	\$436,500,000	\$439,500,000	5.8%	6.5%	Up	6.5%	Projected tuition and fee revenue up due to strong winter enrollment
ICC Revenue	\$28,250,000	\$28,250,000	8.9%	9.6%	Unchanged	8.9%	Projection based on grant activity as COVID restrictions have eased and more research personnel are on campus
Personnel Services	\$452,359,000	\$443,400,000	3.3%	-4.8%	Down	1.3%	Compensation costs down significantly due to unprecedented level of vacant positions. Costs are expected to increase throughout the year as vacancies are filled and annual salary increases are implemented
Service & Supplies	\$112,600,000	\$112,600,000	20.3%	19.0%	Unchanged	20.3%	
Student Aid	\$6,765,000	\$5,000,000	43.6%	-23.8%	Down	6.2%	Reduced due to identification of projection error. Adjusted to historical levels

## Education & General Funds



## All Funds



Student Aid Expense does not include \$60.3M of fee remissions awarded to students. Remissions are booked as negative revenue.  
Capital Expenditures not included.

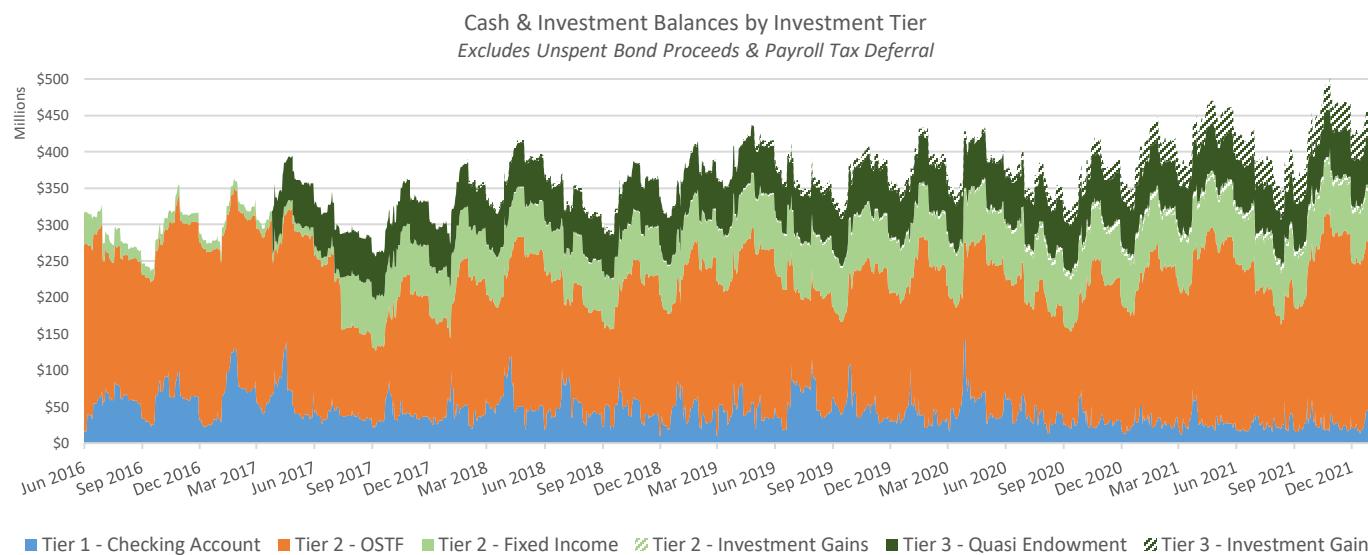
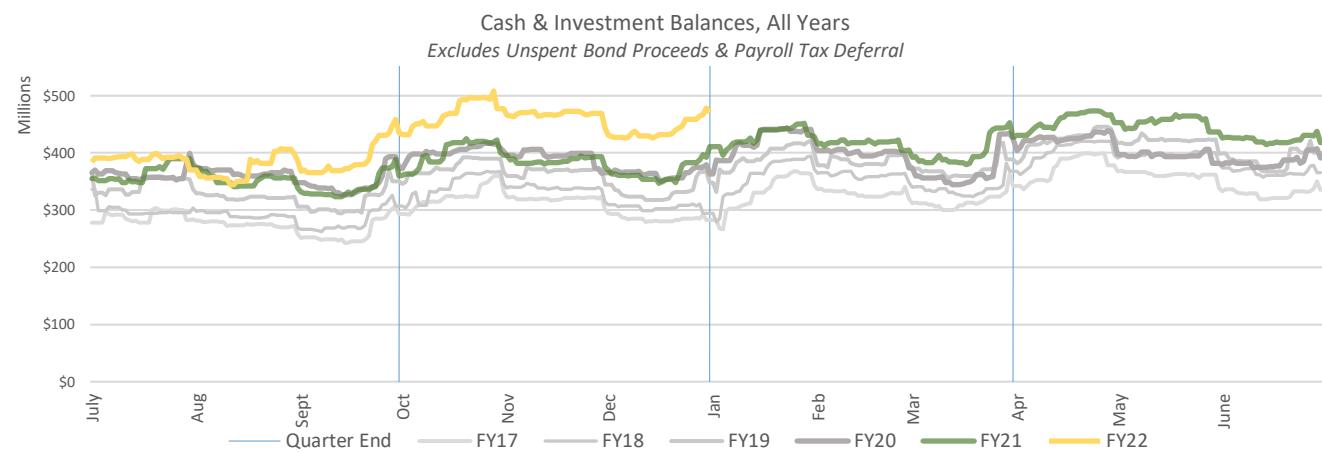
FY22 Actuals Q2 Report										Page 4		
Education and General												
		FY22 Updated Proj. Q1		FY22 Q1 Actual Q2 Proj.		FY22 Q2 inc/(dec) from FY21 Q2		FY22 Total Actual		FY22 Initial Proj. vs FY21 Total as %	FY22 Updated Proj. Q2	FY22 Updated Proj. vs FY21 Total as %
State Appropriation	\$ 85,750,238	\$ 53,603,185	60.3%	\$ 49,476,359	4.5%	\$ 82,720,112	3.7%	\$ 85,750,238	3.7%			
Tuition and Fees	\$ 436,500,000	\$ 298,614,490	68.4%	\$ 280,379,541	6.5%	\$ 412,655,803	5.8%	\$ 439,500,000	6.5%			
Gifts Grants & Contracts	\$ 400,000	\$ 137,643	34.4%	\$ 153,991	-10.6%	\$ 382,053	4.7%	\$ 400,000	4.7%			
ICC Revenue	\$ 28,250,000	\$ 14,715,976	52.1%	\$ 13,421,243	9.6%	\$ 25,952,583	8.9%	\$ 28,250,000	8.9%			
Federal Student Aid	\$	\$		\$		\$		\$				
Interest and Investment	\$ 7,971,000	\$ 4,352,897	54.6%	\$ 3,581,183	21.5%	\$ 7,814,418	2.0%	\$ 8,500,000	8.8%			
Internal Sales	\$ 900,000	\$ 311,082	34.6%	\$ 247,159	25.9%	\$ 695,105	29.5%	\$ 900,000	29.5%			
Sales & Services	\$ 4,000,000	\$ 2,492,827	62.3%	\$ 1,764,824	41.3%	\$ 2,839,650	40.9%	\$ 4,000,000	40.9%			
Other Revenues	\$ 2,250,000	\$ 692,281	30.8%	\$ 346,548	99.8%	\$ 2,051,191	9.7%	\$ 2,250,000	9.7%			
Transfers From Ore State Agencies	\$	\$		\$		\$		\$				
<b>Total Revenue</b>	<b>\$ 566,021,238</b>	<b>\$ 373,010,382</b>	<b>65.9%</b>	<b>\$ 349,370,848</b>	<b>6.8%</b>	<b>\$ 535,110,914</b>	<b>5.8%</b>	<b>\$ 569,550,238</b>	<b>6.4%</b>			
<b>Total Personnel Services</b>	<b>\$ 452,359,000</b>	<b>\$ 189,588,394</b>	<b>41.9%</b>	<b>\$ 199,222,188</b>	<b>-4.8%</b>	<b>\$ 437,853,844</b>	<b>3.3%</b>	<b>\$ 443,400,000</b>	<b>1.3%</b>			
Service & Supplies	\$ 112,600,000	\$ 57,284,463	50.9%	\$ 48,152,632	18.96%	\$ 93,626,145	20.3%	\$ 112,600,000	20.3%			
Merchandise/Resale/Redistribution	\$ 5,100	\$ (119,732)	-2347.7%	\$ 3,100	-3853.3%	\$ (1,258)	-505.4%	\$ 5,100	-505.4%			
Internal Sales Reimbursements	\$ (16,100,000)	\$ (7,588,564)	47.1%	\$ (5,269,519)	44.0%	\$ (12,746,608)	26.3%	\$ (16,100,000)	26.3%			
Indirect Costs	\$ 34,000	\$ 3,402	10.0%	\$ 3,386	0.5%	\$ 3,959	470.5%	\$ 34,000	470.5%			
Depreciation/Amortization Expense	\$ 6,765,000	\$ 2,076,663	30.7%	\$ 2,724,363	-23.8%	\$ 4,709,505	43.6%	\$ 5,000,000	6.2%			
Student Aid	\$	\$		\$		\$		\$				
<b>Total General Expense</b>	<b>\$ 103,304,100</b>	<b>\$ 51,656,230</b>	<b>50.0%</b>	<b>\$ 45,614,052</b>	<b>13.2%</b>	<b>\$ 85,593,744</b>	<b>20.7%</b>	<b>\$ 101,539,100</b>	<b>18.6%</b>			
<b>Net Transfers Out(In)</b>	<b>\$ 8,900,000</b>	<b>\$ 2,502,405</b>	<b>28.1%</b>	<b>\$ 3,000,074</b>	<b>-16.6%</b>	<b>\$ 3,348,942</b>	<b>165.8%</b>	<b>\$ 8,900,000</b>	<b>165.8%</b>			
<b>Total Expense</b>	<b>\$ 564,563,100</b>	<b>\$ 243,747,031</b>	<b>43.2%</b>	<b>\$ 247,836,315</b>	<b>-1.6%</b>	<b>\$ 526,796,531</b>	<b>7.2%</b>	<b>\$ 553,839,100</b>	<b>5.1%</b>			
<b>Net before CapEx</b>	<b>\$ 1,458,138</b>	<b>\$ 129,263,351</b>	<b>8865.0%</b>	<b>\$ 101,534,534</b>	<b>27.3%</b>	<b>\$ 83,14,383</b>	<b>-82.5%</b>	<b>\$ 15,711,138</b>	<b>89.0%</b>			
Beginning Fund Balance	\$ 61,285,476	\$ 61,285,476	100.0%	\$ 54,401,248	12.7%	\$ 54,401,248	12.7%	\$ 61,285,476	12.7%			
Capital Expenditures	\$ (5,100,000)	\$ (1,958,542)	38.4%	\$ (2,284,687)	-14.3%	\$ (3,791,094)	34.5%	\$ (5,100,000)	34.5%			
Net (from above)	\$ 1,458,138	\$ 129,263,351	8865.0%	\$ 101,534,534	27.3%	\$ 83,14,383	-92.5%	\$ 15,711,138	89.0%			
Fund Additions/Decisions*	\$ -	\$ -	-	\$ 16,086	-100.0%	\$ (118,991)	-100.0%	\$ -	-100.0%			
Retirement Incentive Program One-time Expenses	\$ -	\$ -	-	\$ -	-	\$ (6,139,934)	-100.0%	\$ -	-100.0%			
Federal COVID-19 Relief One-Time Funds	\$ 18,700,000	\$ 0.0%	\$ -	\$ 5,458,995	189.5%	\$ 18,700,000	189.5%	\$ 90,596,614	53.2%			
<b>Ending Fund Balance</b>	<b>\$ 76,343,614</b>	<b>\$ 188,590,285</b>	<b>247.0%</b>	<b>\$ 153,667,181</b>	<b>22.7%</b>	<b>\$ 59,124,607</b>	<b>29.1%</b>	<b>\$ 90,596,614</b>	<b>53.2%</b>			
Year-End Accounting Entries **	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD			
Net Capital Assets	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD			
Other Restricted Net Assets	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD			
Unrestricted Net Assets	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD			
<b>Total Net Assets</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>	<b>TBD</b>			

\* - Due to Capital Improvements and Debt Accounting entries

\*\* - Year-End Accounting - e.g. Allocate Pension Liability, Reclass Cash to Investments, Allocate Debt

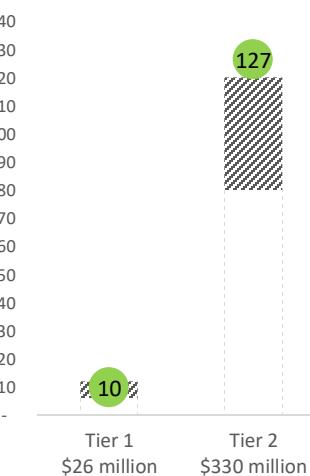
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## Cash &amp; Investment Pool



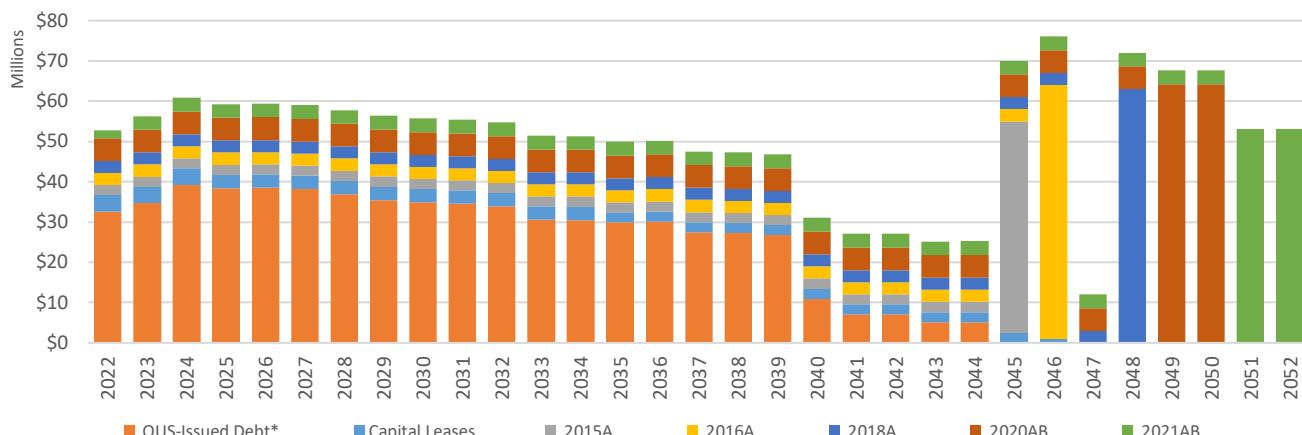
- The cash & investment pool averaged \$459 million during Q2 FY22, excluding bond proceeds and the payroll tax deferral. Average balances for the quarter, excluding bond proceeds and the payroll tax deferral, were approximately \$75 million higher than the same quarter in FY21. Major factors contributing to the increased balance are: (1) increased general fund balances (\$34 million due primarily to changes in payables/receivables and reduced spending on compensation the first half of the year), (2) increased balances in athletics (\$15 million due to resumption of more normal football activities and related revenue), and (3) increases in unrealized investment gains & refinancing of state-issued debt (approximately \$22 million).
- UO participated in the federal program to defer 2020 payroll tax deposits and had accumulated approximately \$13 million in cash balances (excluded from the charts above). \$5.5 million was paid on December 31, 2021 and the remainder is due December 31, 2022.
- At December 31, 2021, there were approximately \$160 million of unspent bond proceeds (average of \$164 million for the quarter), excluded from the charts above. It is expected that all bond proceeds will be allocated to capital projects, with the Housing Transformation project being the primary recipient.
- Estimated average accounting yield for the cash & investment pool was 1.23% for Q2FY22 compared to 1.51% for Q2FY21. Fiscal YTD return for FY22 is 1.28%, compared to 1.53% in FY21. Reduced returns are a result of a lower short-term interest rate environment.
- The Q2FY22 T3 report is expected in a few weeks and will be provided at that time.

Days Cash on Hand  
Average for quarter, Excludes Unspent Bond Proceeds & Payroll Tax Deferral, Target Range for Tiers 1 & 2 in Stripes



## Debt Activities

### Debt Service and Capital Lease Payments



\*OUS-issued debt includes SELP but is net of expected SELP appropriations and Build America Bond subsidies.

### Significant projects funded with debt and capital leases

#### UO 2021AB

- Housing Trans. Ph 2 & 3
- Thermal Storage

#### UO 2020AB

- Housing Trans. Ph 1 & 2
- Millrace Parking Garage

#### UO 2018A

- Bean Hall
- Oregon Hall
- Health Center

#### UO 2016A

- Kalapuya Ilihi Hall
- Pacific Hall
- Klamath Hall

#### UO 2015A

- Erb Memorial Union

#### Capital Leases

- White Stag (Portland)
- 1600 Millrace

#### OUS-Issued Debt

- Autzen Stadium
- Central Power Station
- Erb Memorial Union
- Family Housing Projects
- Ford Alumni Center
- Global Scholars Hall
- Knight Law Center
- Living Learning Center
- Parking Projects
- Student Rec Center
- Matthew Knight Arena
- Williams Bakery Land

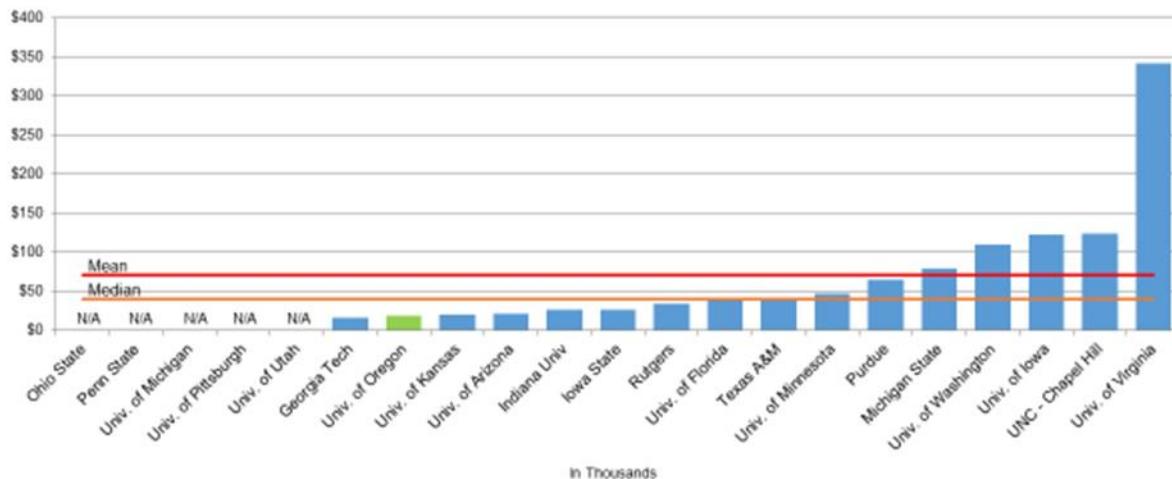
- The current principal balance of outstanding debt, including capital leases, is approximately \$897 million.
- Bond proceeds are loaned internally for capital projects. Borrowers are scheduled to repay their loans prior to the corresponding bullet payments due in 2045 and beyond to ensure the Internal Bank will have sufficient cash for the bullets.

The purpose of this document is to provide responses to questions that arose during the presentation of the Treasury Operations annual report to the Board of Trustees at the December 1, 2021, meeting. The questions pertained to the University of Oregon's (UO) peer comparison graphs. The first question posed was how the UO would compare to its peers if we normalize the data on a per student FTE basis. To answer this question, we calculated cash and investments (both excluding and including foundation assets) and net assets on a per-student FTE basis. Following are the results of those calculations.

The graph below shows a peer comparison of total cash and investments, excluding foundation assets, per student FTE. When excluding foundation assets, the UO remains near the bottom of the peer group comparison with total cash and investments of \$18,642 per student FTE. This is significantly below the peer group median and mean total cash and investments per student FTE of \$41,466 and \$74,230, respectively. Note that universities that do not report separate foundation assets are noted as N/A.

## Peer Comparison: Total Cash and Investments per Student FTE

*Excludes foundation assets, N/A for universities that do not break out foundation assets*

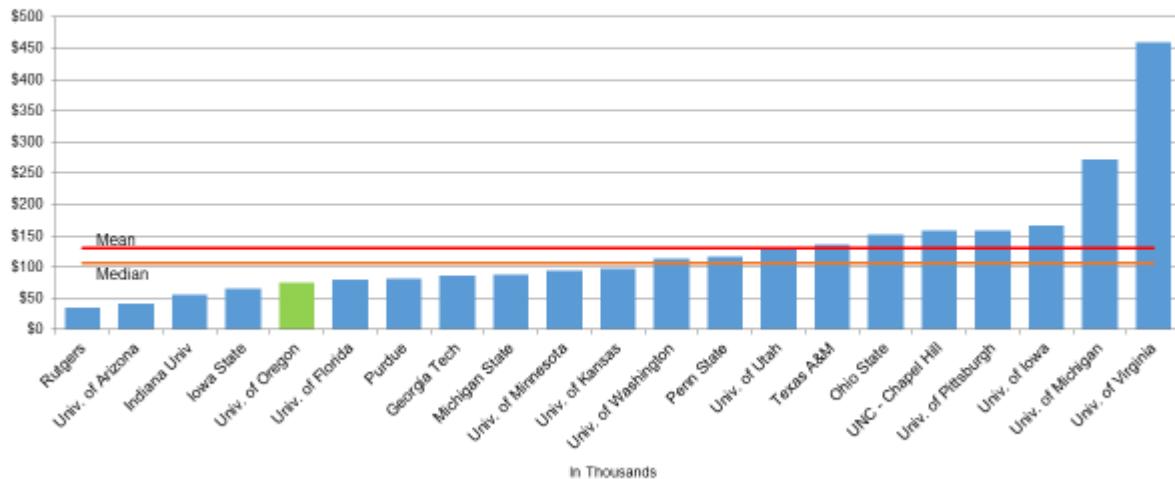


Source: Moody's FY 2020 data provided by Bank of America

The following graph also shows a peer comparison of total cash and investments per student FTE but includes foundation assets. In this instance, the UO compares more favorably to its peers, though it remains in the lower quartile of the peer group, with cash and investments of \$74,960 per student FTE. This compares to a median of \$105,662 and a mean of \$129,417 per student FTE for the comparator group.

## Peer Comparison: Total Cash and Investments per Student FTE

*Includes foundation assets*

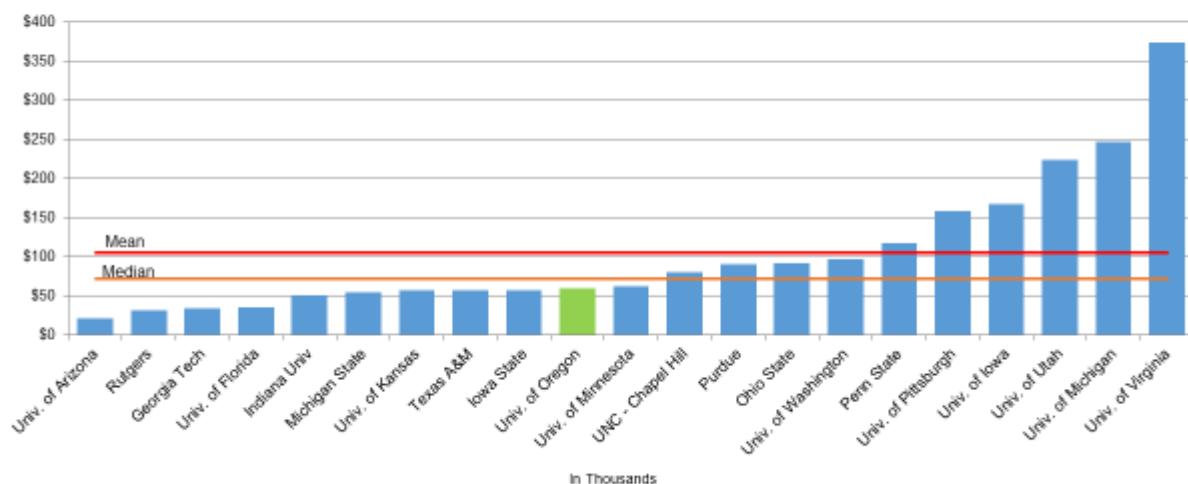


Source: Moody's FY 2020 data provided by Bank of America

The final graph presents a peer comparison of net assets per student FTE. It is important to note that the net asset figures include not only cash and investments but also net capital assets for each institution. The UO's net assets per student FTE of \$59,972 is close to the median of \$71,492. This remains substantially below the mean of \$105,599 per student FTE as five schools in the peer group have net assets per student FTE that are more than twice the median.

## Peer Comparison: Net Assets per Student FTE

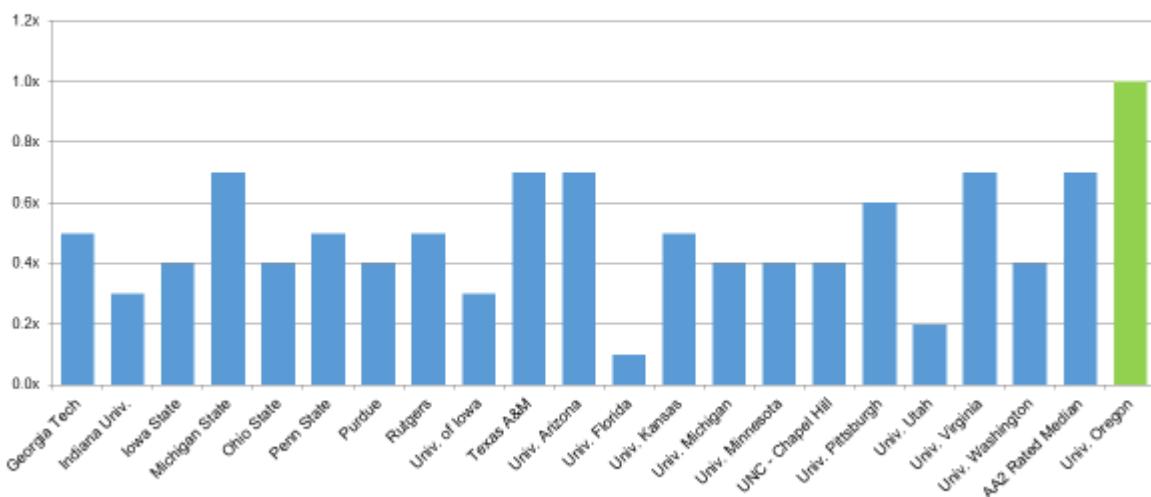
*Includes capital assets and pension liabilities*



Source: Moody's FY 2020 data provided by Bank of America

A second question that was asked during the December Board meeting inquired into the length of time it will take the UO to reach a debt to revenue ratio of 0.7x. The UO's ratio at the end of fiscal year 2020 was 1.0x and greater than any of its peers in the comparison presented to the Board of Trustees. For reference, the graph presented at the December Board meeting is shown below.

## Peer Comparison: Debt / Revenue



Source: Moody's FY 2020 data provided by Bank of America

A ratio of 0.7x would bring the UO in line with Moody's AA-rated median and equal to four of its AAU peers.

We analyzed this question in two ways: the first assumed no additional debt over the next several years, while the second assumed additional debt issuances of \$50 million occurring every other year beginning in fiscal year 2025. In addition to debt assumptions, we projected revenue increases over the next several years. Fiscal year 2022's projected 12.9% revenue increase aligns with the second quarter's updated projections. Subsequent projected annual increases of 4.5% were based on a weighted average of the UO's various revenue streams.

As can be seen in the tables below, if the UO issues no additional debt, it is projected to reach a debt to revenue ratio of 0.7x by 2026. Issuing \$50 million of debt every other year beginning in fiscal year 2025 does not prevent us from attaining a ratio of 0.7x in 2026 but it does slow future reductions of the ratio.

University of Oregon  
Debt to Revenue  
(Debt and revenue in millions)

FY	Beginning Debt	New Debt	Debt Service Payments	Ending Debt	Annual Increase	Projected Revenue *	Debt to Rev
2020				888.00		925.00	1.0x
2021	888.62		10.61	878.01		896.00 **	1.0x
2022	878.01	100.85	19.23	959.63	12.9%	1,044.33	0.9x
2023	959.63		22.44	937.20	4.5%	1,071.78 ***	0.9x
2024	937.20		28.18	909.02	4.5%	1,120.01	0.8x
2025	909.02		27.75	881.27	4.5%	1,170.41	0.8x
2026	881.27		29.11	852.16	4.5%	1,223.08	0.7x
2027	852.16		30.09	822.07	4.5%	1,278.12	0.6x
2028	822.07		27.02	795.05	4.5%	1,335.63	0.6x
2029	795.05		25.70	769.35	4.5%	1,395.73	0.6x
2030	769.35		26.13	743.22	4.5%	1,458.54	0.5x

University of Oregon  
Debt to Revenue  
(Debt and revenue in millions)

**Assumes a \$50 million bond issuance every other year starting in FY2025**

FY	Beginning Debt	New Debt	Debt Service Payments	Ending Debt	Annual Increase	Projected Revenue *	Debt to Rev
2020				888.00		925.00	1.0x
2021	888.62		10.61	878.01		896.00 **	1.0x
2022	878.01	100.85	19.23	959.63	12.9%	1,044.33	0.9x
2023	959.63		22.44	937.20	4.5%	1,071.78 ***	0.9x
2024	937.20		28.18	909.02	4.5%	1,120.01	0.8x
2025	909.02	50.00	27.75	931.27	4.5%	1,170.41	0.8x
2026	931.27		29.11	902.16	4.5%	1,223.08	0.7x
2027	902.16	50.00	30.09	922.07	4.5%	1,278.12	0.7x
2028	922.07		27.02	895.05	4.5%	1,335.63	0.7x
2029	895.05	50.00	25.70	919.35	4.5%	1,395.73	0.7x
2030	919.35		26.13	893.22	4.5%	1,458.54	0.6x

\* Projected revenue was modified from the financial statement computation to align with Moody's definition of revenue

\*\* Estimated projection of Moody's revenue calculation

\*\*\* Less HEERF payments included in FY2022 (\$18.7 million)



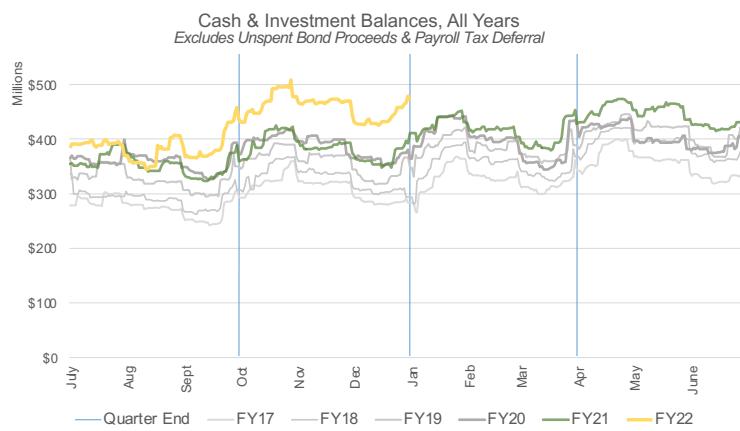
## Treasury Operations Quarterly Update

March 2022

Jamie Moffitt, VPFA/CFO/Treasurer

Board of Trustees of the University of Oregon

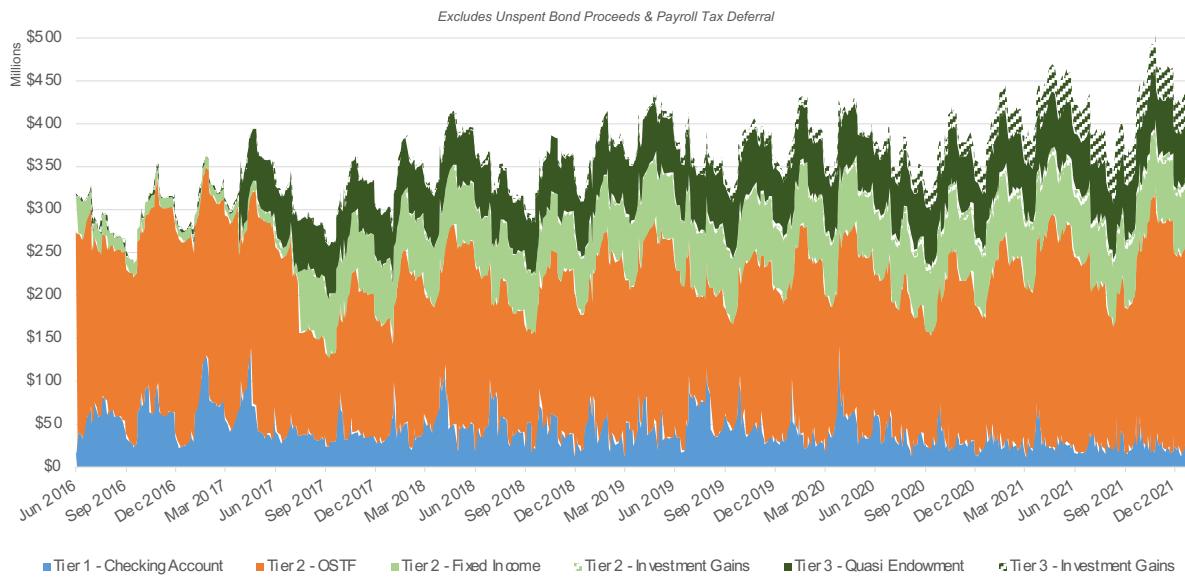
## Cash & Investment Balances



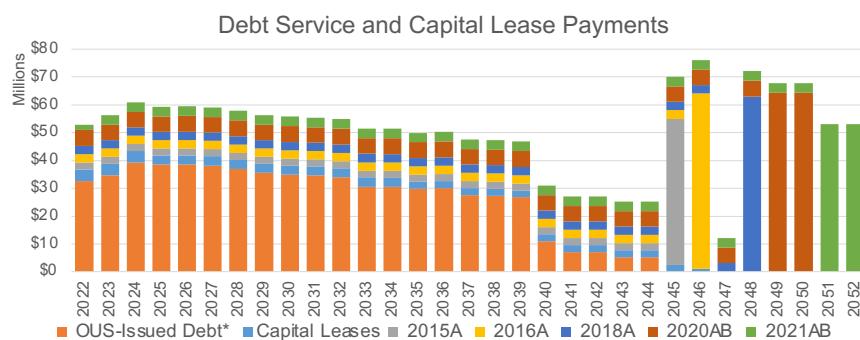
- Estimated average accounting yield for the cash & investment pool was 1.23% for Q2 FY22 compared to 1.51% for Q2 FY21. Fiscal YTD return for FY22 is 1.28%, compared to 1.53% in FY21. Reduced returns are a result of a lower short-term interest rate environment.
- The Q2 FY22 T3 report is expected in a few weeks and will be provided at that time.

- Average balances for the second quarter, excluding bond proceeds and the payroll tax deferral, were \$459 million and approximately \$75 million more than the same quarter in FY21.
- Major factors contributing to the increased balance are:
  - Increased general fund balances (\$34 million due primarily to changes in payables/ receivables and reduced spending on compensation the first half of the year)
  - Increased balances in athletics (\$15 million due to resumption of more normal football activities and related revenue)
  - Increases in unrealized investment gains & refinancing of state-issued debt (approximately \$22 million)

## Cash & Investment Balances By Tier



## Debt Service and Capital Lease Payments



\*OUS-issued debt includes SELP but is net of expected SELP appropriations and Build America Bond subsidies.

- The current principal balance of outstanding debt, including capital leases, is approximately \$897 million.
- Bond proceeds are loaned internally for capital projects. Borrowers are scheduled to repay their loans prior to the corresponding bullet payments due in 2045 and beyond to ensure the Internal Bank will have sufficient cash for the bullets.

## **Agenda Item #5**

### **Student Basic Needs Support**

# Basic Needs Program

**Jimmy L. Howard, PhD**

Associate Dean of Students



## Food Insecurity

**59.4%**

Of UO undergraduates  
were worried about  
food between Spring  
2020 and Spring 2021.

**21.1%**

Of UO undergraduates  
were food insecure  
between Spring 2020  
and Spring 2021-  
double the national  
rate of 10.5%

**37.9%**

Of lower SES UO  
undergraduates were  
food insecure between  
Spring 2020 and Spring  
2021

# Housing Insecurity

**54.6%**

This academic year's UO Students in Crisis Fund applicants were seeking rental assistance.

**43%**

Of undergraduates nationwide reported being housing insecure in 2021

**14%**

Of undergraduates nationwide reported they have no permanent housing.

#RealCollege 2021

#RealCollege 2021

# Financial Insecurity

**3030+**

Applications for UO Students in Crisis Funding since Spring 2020

**\$3,419,304**

Of requests from the students in crisis fund since Spring 2020

**61%**

Of undergraduates nationwide reported applying for emergency aid to stay enrolled

#RealCollege 2021

# Focus on Basic Needs Insecurity

- Dean of Students Support
- Campus Initiatives
- ASUO funds from I-Fee
- Oregon House Bill 2835

## New Basic Needs Program



- Student Benefits Navigation & Support
- Emergency and Hardship funding navigation
- Subsidy Coordination (Textbook, Child Care, Housing)
- Coordination of Food Security Programs
- Temporary and Long-term Housing Support
- Community Access and Resource Awareness
- Prevention Programming on Basic Needs
- Program and Campus Basic Needs Assessment

# Staff Team



**Hillary Falburn, MSW, CSWA**

**Basic Needs Coordinator:  
Housing and Financial  
Security Navigation**

**Madeline Hagar, B.A.**

**Basic Needs Coordinator:  
Food Security and  
Community Access  
Initiatives**



- Director of Basic Needs and Off-Campus Support
  - HB2835 Benefits Navigator (BN)
  - Oregon BN Coalition Member
- Coordinator, Housing and Financial Security Navigation
- Coordinator, Food Security and Community Access
- Student Workers & Volunteers

## Upcoming Initiatives

- Winter '22
  - **Student Referral Form**
  - **Quarterly Impact Reports**
- Spring '22
  - **Basic Needs Support Syllabus Statement**
  - **Temporary Housing Space**
  - **Textbook Subsidy Rollout**
  - **Food Security Initiatives Dashboard**
  - **Updated Website & Informational Material**

# Questions?



For more information contact:  
Jimmy L. Howard, Ph.D.  
[jhoward8@uoregon.edu](mailto:jhoward8@uoregon.edu)



Thank You:

- ASUO
- Division of Student Life
- Director of SL Assessment & Research
- The Hope Center

## **Agenda Item #6**

### **State Affairs Update**

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**To:** University of Oregon Board of Trustees  
**From:** Hans Bernard & Jenna Adams-Kalloch - State Affairs  
**Subject:** 2022 Regular Session Update

**Contact Information:**

[hbernard@uoregon.edu](mailto:hbernard@uoregon.edu)  
[jadamsk@uoregon.edu](mailto:jadamsk@uoregon.edu)

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**March 03 2022**

Oregon lawmakers recently adjourned the 2022 short Legislative Session, which began February 1. This was another session of all legislative hearings occurring virtually, including participation by members of the public and lobbyists.

The work of the Legislature was dominated by the continued response to the pandemic, deliberating over farmworker overtime policy, negotiating the Governor's workforce proposal, addressing housing affordability, and distributing over \$2 billion dollars.

Major leadership changes took place this session and there are many more to come in the 2023 session. Rep. Dan Rayfield, from Corvallis, is now House Speaker, following the resignation of Tina Kotek as she pursues her campaign for Governor. Rep. Julie Fahey, who represents parts of Eugene and Junction City, is now the House Majority Leader and the new House Minority Leader is Rep. Vikki Breese Iverson from Prineville.

The newest UO alum to be appointed to the Legislature is Sen. Rachel Armitage from Scappoose, who graduated with a BS in Geography in 2015. That makes a total of 14 UO alumni in the Oregon Legislature this session. (Full list [here](#).)

Debates over the merits of masking requirements continued in the legislature and led to the Senate voting to expel Senator Dallas Heard from the Floor and the Capitol due to his refusal to wear a mask in violation of the Capitol and OHA rules.

**Budget**

The surging revenues allowed for lawmakers to make investments across the board.

**Investments in the University of Oregon**

- Over \$10 million to purchase scientific equipment for Building 2 of the Phil and Penny Knight Campus for Accelerating Scientific Impact. This state investment will support the build-out of a real-time, machine-learning fueled integrated tissue characterization and bioprinting facility. This will catalyze research to better understand the interactions of cells within tissues and to construct tissues and organs that open new avenues in personalized medicine.

- \$4.5 million to support the work of Professor Doug Toomey and the Oregon Hazards Lab (OHAZ) Wildfire Camera Network. ALERTWildfire provides access to state-of-the-art fire cameras to help firefighters and first responders monitor fire conditions quickly and accurately enabling them to send appropriate resources and send evacuation notices as needed. This is increasingly important with more extreme fire seasons facing our state in recent years.
- \$700,000 to support the College of Education's Oregon Child Abuse Prevalence Study expansion. This will support the most comprehensive child abuse prevalence study in the US and will provide data to help Oregon policymakers direct funding appropriately. The Oregon Child Abuse Prevalence Study, the first and most innovative child abuse prevalence and youth voice project in the U.S., will serve as the gold standard for prevention measurement.

#### **Investments for all Oregon Public Universities**

- A \$30 million increase in Capital Improvement and Renewal bonds designed to address cost escalations on previously approved capital projects. For UO, the ask was for \$15 million to cover cost escalation for Huestis Hall (approved by legislature in 2020) and the Heritage Project, consisting of University and Villard Halls (approved by legislature in 2021). Given the sharing formula with the other universities, UO is likely to receive around half of that amount, \$7.6 million.
- \$19 million for the Tribal Student Grant Program. This will provide financial aid grants to students who are enrolled in a recognized Native American tribe.
- A \$17.24 million increase in funding for the PERS Employer Incentive Fund. The program encourages PERS employers to make a lump-sum payment to pre-pay what they currently owe, reducing their overall payments by avoiding additional interest. When a match from the state is combined with these payments it effectively reduces employers' contribution. A win-win for both the employee *and* employer.
- \$7.5 million for the Strong Start / Summer Bridge Program. UO will receive roughly \$1.5M of this funding. In 2021, the Legislature provided one year of funding for these programs which successfully assisted students in the transition from high school to college, with a focus on those who were most impacted by remote instruction and the COVID-19 pandemic. This investment will support the program for 2022 for high school graduates who did not enroll in college due to the pandemic or enrolled in college and were adversely impacted by the pandemic. Program elements to assist these students include intensive academic supports in math and writing, academic advising, note taking skills, time management, early move-in to campus, peer mentoring, tutoring, and financial literacy.
- The Oregon Department of Veterans' Affairs is giving \$600,000 in grant funding to 15 colleges and universities across the state to primarily support the institutions' Campus Veteran Resource Centers and bolster other services for Oregon student veterans. UO was awarded \$50,600 of these grant funds. ([source](#))

## Policy Bills Affecting University of Oregon

- [\*\*SB 1505\*\*](#): Expanding the Rights of Student-Athletes: In 2021, with the passage of SB 5, Oregon became one of the earliest states to clear the way for student-athletes to benefit from the use of their name, image, and likeness (NIL). This bill expands Oregon's NIL law by requiring producers to provide royalty payments to student-athletes if their individual name, image, or likeness is used on a jersey, trading card, in a video game or other such setting. Oregon will become just the second state in the country to provide this benefit to student-athletes.
- [\*\*SB 1522\*\*](#): The omnibus education bill. Among other things, it includes in-state tuition eligibility for Afghan refugees, in-state tuition provisions for veterans, provides access to educational programs at correctional facilities, modifies eligibility for Oregon Promise Grant, and modifies requirements for part-time faculty health insurance.

## University Activities/Committees

- **Governance Review:** The Senate Education Committee hosted AGB representatives at a public hearing this session to receive an overview of the study they recently completed on public university governance in response to SB 854 of 2021. Carol Cartwright and Rich Novak presented on behalf of AGB to discuss the findings of the report. EOU Trustee Richard Chavez and PSU Board Secretary Cindy Starke provided public comment.
- **Task Force on Student Success** for Underrepresented Students (HB 2590 of 2021): Since being appointed last fall, the Student Voices Task Force has held a handful of public meetings, as well as private planning committee meetings. Kimberly Johnson and Jim Brooks from UO have attended planning meetings, providing feedback on the task force's plans to travel to campuses across the state to meet with students, university staff, community-based organizations, and local business leaders. While subject to change, the task force plans to visit the Willamette Valley on April 13th and 14th, with one day dedicated to community college stakeholder meetings and visits, and one day dedicated to public university stakeholder meetings and visits. Notably, UO is the only institution that has had a student testify during every public meeting.
- **Higher Education Coordinating Committee:** The Senate recently confirmed Governor Brown's appointments of new Commissioners to the HECC and university Boards of Trustees. HECC appointee terms begin March 1, 2022 and include former State Senator Richard Devlin who will serve in the position currently held by Commissioner Larry Roper; PSU student Motutama Sipelli will serve in the new graduate student position; and PSU employee Aislyn Matias will serve in the position currently held by Enrique Farrera.

## Other Major Investments from the 2022 Legislative Session

- **Housing:** [\*\*\\$400 million\*\*](#) to respond to and prevent homelessness. Investments to help Oregonians for more shelter capacity, rapid rehousing, resource referrals and housing stability. Local governments will receive grants for shelter capacity, hygiene needs and outreach. This funding

will also go towards innovative solutions, like Project Turnkey 2.0, which acquires and repurposes hotels and other buildings to convert into shelter or housing.

- **Workforce training:** Over \$200 million for a workforce training package. \$95 million will be dedicated to community organizations to subsidize skill development, \$20 million to expand apprenticeship opportunities, \$35 million for local workforce boards, \$15 million for career programs at community colleges, \$45 million to OHSU to increase graduates from underrepresented populations.
- **Behavioral Health:** \$175 million to retain employees, and \$100 million for behavioral health housing.
- **K-12 Education:** \$150 million for K-12 summer learning with grants for enrichment activities, summer school programs, and summer community activity grants, \$26 million to expand career and technical education in high schools, \$5 million to increase graduation rates for black students.
- **Rural Oregon:** [\\$100 million](#) on rural Oregon infrastructure projects including fairgrounds, wastewater treatment systems, and other public works.
- **Child Care:** \$100 million for child care worker retention and recruitment and subsidies for low-income families.
- **Climate Change:** \$100 million for climate resilience dedicated to electric vehicle incentives, making homes more efficient, solar panel rebates and drought resiliency.



# OREGON PUBLIC UNIVERSITIES 2022 JOINT UNIVERSITY AGENDA



## Supporting Students with Direct Investments, Expanded Rights, and Updated Learning Environments

**I**n 2021, Oregon lawmakers made substantial investments in Oregon's students, including funding the universities operating budget request of \$900 million, approving capital projects for all university campuses, and making investments in health care for part time faculty and benefits navigator positions for colleges and universities across the state.

In 2022, Oregon's public universities are focused on ensuring students can continue on the path toward graduation in the midst of the ongoing global pandemic. Thanks to the extraordinary talent and resilience of our faculty and staff, students have safely returned to in person instruction in most cases. Students are also being offered many

new options for learning, including expanded online experiences and flexible-formatted classes, allowing students to move between face-to-face and remote learning during the term. Universities are building on the lessons learned from the pandemic.

During the 2022 legislative session, public universities are focused on securing investments that enhance success for students from underrepresented backgrounds and those most impacted by the pandemic, ensure the ability to deliver on capital construction renovations that provide modern and safe learning environments for students, and expand the ability of student-athletes to benefit from their name, image, and likeness.





## Strong Start / Summer Bridge Funding

In 2021, the Legislature provided one year of funding for Strong Start / Summer Bridge programs at Oregon's public universities. These programs successfully assisted students in the transition from high school to college, with a focus on those who were most impacted by remote instruction and the COVID-19 pandemic. The need for additional academic support continues into 2022 for high school graduates who did not enroll in college due to the pandemic or enrolled in college and were adversely impacted by the pandemic with reduced academic load, financial distress and poor grades. Additionally, these programs can help ease the transition to a university setting for some community college transfer students. Program elements to assist these students include intensive academic supports in math and writing, academic advising, note taking skills, time management, early move-in to campus, peer mentoring, tutoring, and financial literacy. Public universities are requesting \$7.5M to fund a second year of Strong Start.

## Expanding the Rights of Student-Athletes

In 2021, with the passage of SB 5, Oregon became one of the earliest states to clear the way for student-athletes to benefit from the use of their name, image, and likeness (NIL). In 2022, public universities are supporting SB 1505. This bill expands Oregon's NIL law by requiring producers to provide royalty payments to student-athletes if their individual name, image, or likeness is used on a jersey, trading card, in a video game or other such setting. If passed, Oregon would become just the second state in the country to provide this benefit to student-athletes.

## Delivering on Previously Approved Capital Investments for Students

In 2020 and 2021, the Legislature made significant investments in capital projects across Oregon's universities designed to address deferred maintenance and life safety concerns in aging buildings and ensure that Oregon students are learning in modern facilities. Despite building responsible cost escalation estimates into these projects, record inflation and workforce shortages make it impossible for universities to achieve the original vision in which the Legislature invested. They are also unable to realize the aspirations of the generous donors who committed nearly \$125 million to support this vital state infrastructure. Universities are requesting funds to address shortfalls in these projects to ensure they can complete the necessary improvements for students across the state.

## Supporting Oregon's Indigenous Students with Additional Financial Aid

Public universities strongly support the Higher Education Coordinating Commission (HECC) request for an investment that would provide enhanced financial aid awards to students who are enrolled members of federally recognized tribes. The universities believe that this program should be structured in a manner that provides the most aid possible to students, and does not create undue risk that funding will not be available in future years. The worst outcome possible would be to have students receive financial aid, enroll, and then be forced to pause or stop out if funding was not continued.

## **Agenda Item #7**

### **AY2022-23 Tuition & Mandatory Fees**

*Note regarding packet materials: Provided in this packet are (i) this summary, (ii) a memo from President Schill outlining his final recommendations, (iii) the resolution, (iv) a slide deck, (v) the Tuition and Fee Advisory Board Recommendation, (vi) tuition and fee tables, and (vii) the tuition and fee policy book. All of the materials, including the tuition and fee tables referenced in the resolution, are based on the Associated Students of the University of Oregon (ASUO) initial recommendation related to the Incidental Fee (I-Fee) and how to address expenses in the Erb Memorial Union (EMU). ASUO is revisiting that proposal. If they forward a new proposal, the President will revise his fee recommendations to the board. Any changes will be provided as a supplemental document in advance of the meeting.*

### **PROCESS RECAP**

The Tuition and Fee Advisory Board (TFAB) provides advice to the president on tuition and mandatory fees, as well as issues related to tuition structure (e.g., differential tuition or a tuition guarantee program). The TFAB schedule as well as the information provided to TFAB members—including meeting agendas, meeting materials, meeting notes, and background information—is posted on the university's tuition website (<https://uoregon.edu/tuition>). All TFAB meetings were open to the public. Between October 2021 and February 2022, the TFAB met nine times. In addition to its meetings the TFAB with the help of ASUO, held a student tuition forum in mid-January.

The TFAB is co-chaired by Jamie Moffitt, Vice President for Finance and Administration and CFO, and Kevin Marbury, Vice President for Student Life. Its membership includes students, faculty, deans, vice presidents, vice provosts, and other administrative staff engaged in budgeting, institutional research, and financial aid. A full set of TFAB meeting notes is available at the tuition page linked to above.

In February, the TFAB co-chairs provided the President with a memo summarizing the advisory group's recommendations.<sup>1</sup> Shortly thereafter, the President wrote an email to campus regarding TFAB's recommendations, posted the TFAB recommendation memo and sought public comment on it through an online survey (open from Feb. 11-Feb. 18) and a public forum, held in person, with the option for participants to join virtually (held Feb. 15).

### **ANTICIPATED COST INCREASES & FY23 BUDGET ASSUMPTIONS**

The following is a non-exhaustive list of known and anticipated major cost increases considered by the TFAB. These reflect recurring cost drivers that will be added to the UO's Education and General ("E&G") budget year-over-year (an approximately 3.6 increase). There are other cost increases, such as those which might be found in schools or colleges; this list focuses on high-level, major institutional increases.

Item	Anticipated FY23 Increase
Faculty, staff and graduate employee salary and wages	\$15.0 million
Health insurance costs (state policy driven)	\$1.6 million
Institutional expenses (e.g., utilities, insurance)	\$1.2 million
Strategic investments	\$2 million
Minimum wage increase (state policy driven)	\$257,000
<b>Total Projected Cost Increases</b>	<b>\$20.1 million</b>

<sup>1</sup> This memo was circulated to trustees on February 15 and is available at <https://tuition.uoregon.edu/updates>.

In addition to these cost drivers, a few other key figures are relevant to the discussion of FY23 tuition and fees. First is the **projected FY22 E&G budget gap** which exists before any of the above FY23 cost increases are factored in. When TFAB began its deliberations, this budget gap was estimated at \$3.7 million. As TFAB continued to meet in January the E&G fund projections improved and the group assumed that the FY22 E&G fund budget was balanced. Second is the estimate of **non-reoccurring covid expense impacts**, which is difficult to estimate. Due to reduced activity on campus and current labor markets, FY 22 E&G fund expenses are low this year, particularly around compensation costs as staffing levels are down hundreds of employees. TFAB used an estimate of \$10 million for costs that would likely be added back to the FY23 E&G fund budget, in addition to annual inflationary adjustments. Hiring has proved even more challenging than was initially assumed in the financial projections. The Q2 financial update includes a further \$9 million drop in FY22 compensation costs. While this is leading to a projected increased to the FY22 year-end fund balance of a little over \$10 million, this savings is one-time and will disappear after the institution is able to rehire critical faculty and staff. TFAB discussed how any further improvement to the E&G fund figures due to reductions in compensation costs would not affect the financial analysis related to tuition rates as improvements in the FY22 year-end budget would be offset by an increase to the adjustment for non-recurring costs savings that must be added back to the FY23 budget assumptions.

In addition, the UO's **state appropriation** is a considerable factor in determining the financial picture and tuition rates. Currently, the university receives approximately \$85.8 million in operating support from the state to the E&G fund. Given the stage in the state budgeting process the size of the Public University Support Fund (PUSF) is likely set. TFAB used the state Higher Education Coordinating Commission's (HECC) most recent projections to estimate that the UO allocation would increase by \$4 million in FY23.

#### **GUARANTEED TUITION MODEL**

The Oregon Guarantee was established by the Board of Trustees in March 2020. The first cohort fully in the program are those undergraduate students who entered the UO summer of 2020 or later. As a reminder, the plan includes the following components for *undergraduate* tuition; graduate tuition is not part of the program:

- **Each incoming cohort of students** has tuition and administratively-controlled mandatory fees (i.e., mandatory fees except for the ASUO I-Fee) locked for up to five years. This includes differential tuition rates associated with the Clark Honors College and the Lundquist College of Business, summer tuition rates, as well as the international student fee.
- **Students enrolled at the UO prior to this program** (i.e., enrolled prior to summer 2020) were given a modified guarantee in the form of known, established annual tuition and administratively-controlled mandatory fee increases of 3% per year.

Now, two years into the guaranteed tuition model, TFAB discussed the positive impact of the program for students, particularly in an economy experiencing inflation significantly above historical trends. More details about the program are available [online](#).

#### **AY23 TUITION RATE PROPOSALS**

As a reminder, 10% of new revenue from tuition is automatically set aside for remissions (e.g., scholarships) as standard practice. The university has also planned to set aside an additional \$3.9 million for remissions related to the enrollment growth initiative. TFAB considered a wide range of scenarios, available on pages 7-8 of its memo, which looked at various total rates, enrollment levels, state appropriations, and resulting budget gaps. The table provided by TFAB is illustrative of how fluctuations in any of those categories can have significant impacts in the overall financial health of the institution.

### ***Undergraduate Tuition – Incoming (New) Students***

President Schill recommends a tuition rate for new resident students in the 2022 Tuition Cohort (those students starting at the university between Summer 2022 and Spring 2023) that is 4.5% higher than the rate charged to the 2021 Tuition Cohort and a rate for new non-resident students in the 2022 Tuition Cohort that is 3.0% higher than the rate charged to students in the 2021 Tuition Cohort. These rates are \$278.05 per credit hour for residents and \$870.17 per credit hour for non-residents. These recommendations are in accordance with the recommendation of TFAB.

### ***Graduate Tuition***

With the exception of the Law School, proposed graduate tuition increases range from 0.0% to 3.1% and details can be found in the associated materials. The school of Law is proposing a 5 percent increase in tuition. The Law school believes that the increase is needed to maintain program quality, cover rising operational costs, and to continue to invest in the student success of its students.

One other note regarding graduate tuition: The Sports Product Design (SPD) MS program is proposing to amend their tuition model to a flat fee structure, with a tuition guarantee. This was the program's original intent and in fact has been marketed that way to students. The President supports TFAB's recommendation to approve this change. More information is in the president's memo.

### ***Honors College Differential Tuition and Matriculation Fee***

Standard practice is for the Matriculation Fee and the Clark Honors College (CHC) differential tuition rate for the incoming cohort of students to increase at the same rate as residential undergraduate tuition (4.5%). For the 2022 Tuition Cohort, the Clark Honors College is instead recommending a 0.5% increase from the 2021 cohort rate. This would result in a differential tuition charge of \$1,007.58 per term for new, incoming students. As the Honors College differential tuition is part of the guaranteed tuition program, the rate charged to the entering cohort of students will be locked for five years.

### **AY23 MANDATORY FEES**

As the Oregon Guarantee phases in, it is important to remember how that program impacts various groups of undergraduate students (graduate students were not included) and the administratively-controlled mandatory fees they pay.

- Undergraduate students who enrolled at the university in summer 2020 or later (i.e., students in the 2020 and 2021 Tuition Cohorts of the new guarantee model) will see no increases as their rates are locked for five years.
- Undergraduate students who enrolled prior to the program taking effect (i.e., those enrolled prior to summer 2020) are subject to fee increases, but the institution committed to rate increases for total administratively-controlled mandatory fees of 3.0% per year for each of the next three years.
- Incoming students who will enroll next year would have rates locked for five years.

With that in mind, below are the administratively-controlled mandatory fee recommendations (which are based on ASUO's original proposal to the President regarding the incidental fee and the EMU fee):

Administratively Controlled Mandatory Fees	All Graduate Students				Undergraduate Students Who Started Before Summer 2020				New, Incoming Undergraduate Students (2022 Cohort) Locked Fees				
									2021 Tuition Cohort		2022 Tuition Cohort		
	FY2022 Fee	Adjusted Fee Rate FY2022	FY2023 Fee	% Increase	FY2022 Fee	FY2023 Fee	% Increase	FY2022 Fee	Adjusted Fee Rate FY2022	FY2023 Fee	% Increase		
Building Fee	\$ 45.00	-	\$ 45.00	0.00%	\$ 45.00	\$ 45.00	0.00%	\$ 45.00	-	\$ 45.00	0.00%		
Health Service Fee	\$ 236.25	-	\$ 244.75	3.60%	\$ 236.25	\$ 244.75	3.60%	\$ 236.25	-	\$ 246.00	4.13%		
Rec Center Fee	\$ 121.25	-	\$ 124.75	2.89%	\$ 118.50	\$ 122.00	2.95%	\$ 133.00	-	\$ 138.50	4.14%		
Student Union Fee	\$ 80.00	\$ 214.00	\$ 220.50	3.03%	\$ 80.00	\$ 82.50	3.13%	\$ 81.75	\$ 215.75	\$ 224.50	4.06%		
Tech Fee	\$ 51.50	-	\$ 53.00	2.91%	\$ 51.50	\$ 53.00	2.91%	\$ 51.50	-	\$ 53.00	2.91%		
<b>Total ACMF</b>	<b>\$ 534.00</b>	<b>\$ 668.00</b>	<b>\$ 688.00</b>	<b>2.99%</b>	<b>\$ 531.25</b>	<b>\$ 547.25</b>	<b>3.01%</b>	<b>\$ 547.50</b>	<b>\$ 681.50</b>	<b>\$ 707.00</b>	<b>3.74%</b>		
<i>Incidental Fee</i>	\$ 268.25	\$ 134.25	\$ 138.25	2.98%	\$ 268.25	\$ 272.25	1.49%	\$ 268.25	\$ 134.25	\$ 138.25	2.98%		
All Mandatory Fees	\$ 802.25	\$ 802.25	\$ 826.25	2.99%	\$ 799.50	\$ 819.50	2.50%	\$ 815.75	\$ 815.75	\$ 845.25	3.62%		

- **Building Fee:** No change.
- **Health Service Fee:** An increase of 3.6% (\$8.50 per term) for graduate students and undergraduate students who started at the institution prior to the summer of 2020, and 4.13% (\$9.75 per term) for new, incoming undergraduate students to respond to growing student needs and to manage labor costs and increased support for increasing mental health services. The increase to new, incoming undergraduate students will be locked for five years.
- **Recreation Center Fee:** An increase, calculated by student group (see above table), is recommended to help cover cost of living adjustments, a planned increase in the minimum wage, and to offset lost revenue from conferences and locker fees from the pandemic.
- **EMU Facility Fee:** The recommendation to the board regarding the EMU facility fee is based on ASUO's original proposal to the President regarding the incidental fee and the EMU fee. This proposal involved transitioning the funding for the EMU from the I-Fee to the to the EMU Facility Fee. EMU funding obligations have required more and more of each year's I-Fee increase in the past, which reduces funds for other ASUO programs. Following the President's Student Tuition Forum, however, it became clear there is disagreement amongst some ASUO senators on how best to address EMU funding within the fee structure. In his recommendation memo, the President has shared his intent to defer to ASUO on how they would like for these fees to be structured. The original proposal that he received from ASUO including transferring the funding from the I Fee to the EMU fee. The President has extended the timeline for ASUO to reach agreement on an amended proposal to 5:00 p.m., Thursday, March 10<sup>th</sup>. Updated materials will be provided if ASUO submits an amended proposal to the President.
- **Technology Fee:** An increase of 2.91% (\$1.50 per term) for all student groups is recommended. The funds from this fee will be used for crucial investments in cybersecurity tools, mission-critical software, and infrastructure.

#### **ASUO Incidental Fee Recommendation**

ASUO's original proposal to the President was to increase the incidental fee by \$4 per term. This fee is subject to change as ASUO finalizes its recommendation on how to address funding for the EMU. See table above for how the proposal will impact each student group.

The I-Fee is a mandatory fee, but it is not controlled by the administration nor is it included in the Oregon Guarantee program. The associated ASUO budget is available upon request. Major lines historically funded by the I-Fee include student union activities and services, ASUO, and support for various programmatic items (e.g., childcare, Emerald Media Group, Oregon Student Association (OSA) membership, legal services).

**TUITION AND FEE POLICY BOOK**

Part of the Board's annual approval of tuition and fees is the adoption of the annual Tuition and Fee Policy Book, which articulates guidelines associated with the collection and use of these revenues. It is effective July 1, 2022.

February 28, 2022

MEMORANDUM

TO: University of Oregon Board of Trustees

FROM: Michael H. Schill, President and Professor of Law



RE: Academic Year 2022-23 Tuition and Fee Recommendation for Board Consideration

Enclosed is my tuition and fee proposal for the 2022-23 academic year, which is based on the recommendations I received from the students, faculty, and staff who comprise the [Tuition and Fee Advisory Board](#) (TFAB). In making this decision, I reviewed the TFAB recommendations, accepted direct feedback from students and other stakeholders as part of a public forum held in person and virtually, reviewed feedback provided through an online survey, and discussed tuition issues with a wide variety of stakeholders.

**Continuing Undergraduate Tuition – The Oregon Guarantee**

The university is in the second year of the guaranteed tuition program, the [Oregon Guarantee](#), which you, the Board of Trustees, approved in the spring of 2020 and which transformed the UO's undergraduate tuition model. Under guaranteed tuition, the rate of tuition and administratively controlled mandatory fees for each new class of undergraduate students does not change for five years. As part of the transition plan for the new program, the Board also locked annual tuition and administratively controlled mandatory fee increases for undergraduate students who started prior to the summer of 2020 at 3 percent per year for a four-year period.

**2022 Undergraduate Cohort Tuition**

The undergraduate tuition rates that you will be considering only impact next year's incoming class. For these incoming students, the 2022 Tuition Cohort of undergraduates, I support TFAB's recommendation which is as follows:

- Resident tuition: \$278.05 per student credit hour (4.5 percent above the 2021 Tuition Cohort rate). Annual full-time tuition for new resident undergraduates will be locked at \$12,512.25—for five cohort years.
- Non-resident tuition: \$870.17 per student credit hour (3.0 percent above the 2021 Tuition Cohort rate). Annual full-time tuition for new non-resident undergraduates will be \$39,157.65—for five cohort years

As always, we will continue to support low-income Oregonians through the [PathwayOregon](#) scholarship and advising program, which ensure that qualifying Federal Pell Grant-eligible Oregonians pay no tuition or mandatory fees.

### Graduate Tuition

I also support TFAB's recommendation for graduate students which are as follows: With one exception, the schools and colleges have proposed increases that range from no increase to 3.1 percent, depending upon the program; the School of Law is recommending an increase of 5 percent (see [the TFAB memo](#) for details).

### Erb Memorial Union Funding

One item addressed in the TFAB recommendation is a proposed agreement between the Associated Students of the University of Oregon (ASUO) and the University of Oregon that would transition funding for the Erb Memorial Union (EMU) from the Incidental Fee to the Student Union Fee.

I want to be clear, I support the ASUO decision making process, and I will defer to the ASUO on this issue. As stated in the TFAB memo, ASUO President Isaiah Boyd and Vice President for Student Life Kevin Marbury came to an agreement to address the fact that EMU funding obligations are requiring more and more of each year's Incidental Fee increase to go to the EMU, which dramatically reduces funds for other ASUO programs and services. By moving the EMU to the Student Union Fee, a more moderate increase in the I-Fee nets more money for other ASUO programs and services. This agreement would require my support. As I have stated throughout tuition setting process, I am supportive of this approach.

However, during the tuition forum and subsequent discussions, it has become clear to me that there is disagreement among members of the ASUO about how to address the EMU funding issue via the fee structure. I currently have one proposal before me; however, I am willing to consider a new proposal regarding the EMU funding issue, should the ASUO president forward one. To ensure that the ASUO has additional time to consider this important matter, I have extended the deadline for submitting the final Incidental Fee Recommendation to 5:00 p.m., Thursday, March 10.

### Administratively-controlled Mandatory Fees

I support the TFAB recommendations, which are based on the ASUO's current incidental fee proposal, for the following administratively-controlled mandatory fee increases:

- Incoming Cohort of Undergraduate students: Total adjusted administratively controlled mandatory fees: 3.74 percent higher than the 2021 Tuition Cohort rate<sup>1</sup>. (see TFAB recommendation for specific breakdown)

- Graduate Students: Total adjusted administratively-controlled mandatory fees: 3 percent increase

However, if the ASUO president forwards a different proposal to me by March 10, I will adjust my recommendations related to administratively-controlled mandatory fees appropriately.

In closing, I want to thank all the members of TFAB for their hard work and dedication. This proposal I am recommending to the Board of Trustees is the product of their time and effort, including nine open meetings, hours and hours of analysis, and work by a group of students, faculty members, and staff who care deeply about the UO and our ability to deliver quality, affordability, and accessibility.

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## **FY2023 Tuition & Fees Proposal**

**March 15, 2022**

Board of Trustees of the University of Oregon

1

### **Agenda**

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- Tuition and Fee Setting Process
- Background Information
  - Historical and Comparative Data
  - E&G Fund Context
- FY23 Major Cost Drivers
- Tuition and Fee Recommendations

2

## Tuition and Fee Advisory Board (TFAB)

- Advisory group to the President, charged with
  - Developing undergraduate tuition recommendations
  - Reviewing administratively controlled mandatory fees, course fees, housing fees, and graduate tuition proposals each year
- Twenty official members: students, faculty, and staff
  - Students: 2 ASUO officers, 2 undergrads, 1 grad
  - Two faculty: one drawn from Senate Budget Committee
  - Staff: VPs, AVPs, deans, directors and classified staff from business affairs, the budget office, the College of Business, Financial Aid, Institutional Research, the Provost's Office, Social Sciences, SOJC, Student Life, and Undergraduate Education
- All TFAB meetings were open to the public

3

## Tuition and Fee Setting Process: FY2022

- Fall term: During **4 meetings** TFAB was provided with training on
  - Historical and comparative data & UO budget information
  - Background on the Public University Support Fund
  - Impact of COVID-19 on institutional finances; Guaranteed Tuition Program; cost drivers; long-term financial projections; plan for cost management
- Winter term: Proposal review and discussions during **5 meetings**
  - TFAB reviewed proposals on: admin-controlled mandatory fees (EMU, Rec Center, Health Services, Tech), course fees, housing, and graduate programs
  - TFAB discussed tuition rates for incoming undergraduates
  - January 11: TFAB & ASUO co-hosted a virtual student tuition forum
  - February 11: TFAB made recommendations to the president
  - February 15: President hosted a hybrid forum on tuition and fees
  - February 11-18: President welcomed written comment on TFAB's recommendations
  - Early March: President shared his tuition recommendations with the Board

4

## Tuition and Fee Setting Process: Tuition Website

The image shows two screenshots of the University of Oregon Tuition website. The left screenshot displays the 'TFAB recommendations to the president, February 2022' page, which includes a list of recommendations and links to agendas and summaries for February 1 and January 28. The right screenshot shows the 'The Oregon Guarantee' page, which provides information about the tuition guarantee program and links to the Tuition-Setting Process, TFAB Meeting Schedule, and TFAB Meeting Updates.

5

## Tuition and Fee Setting Process: Communications

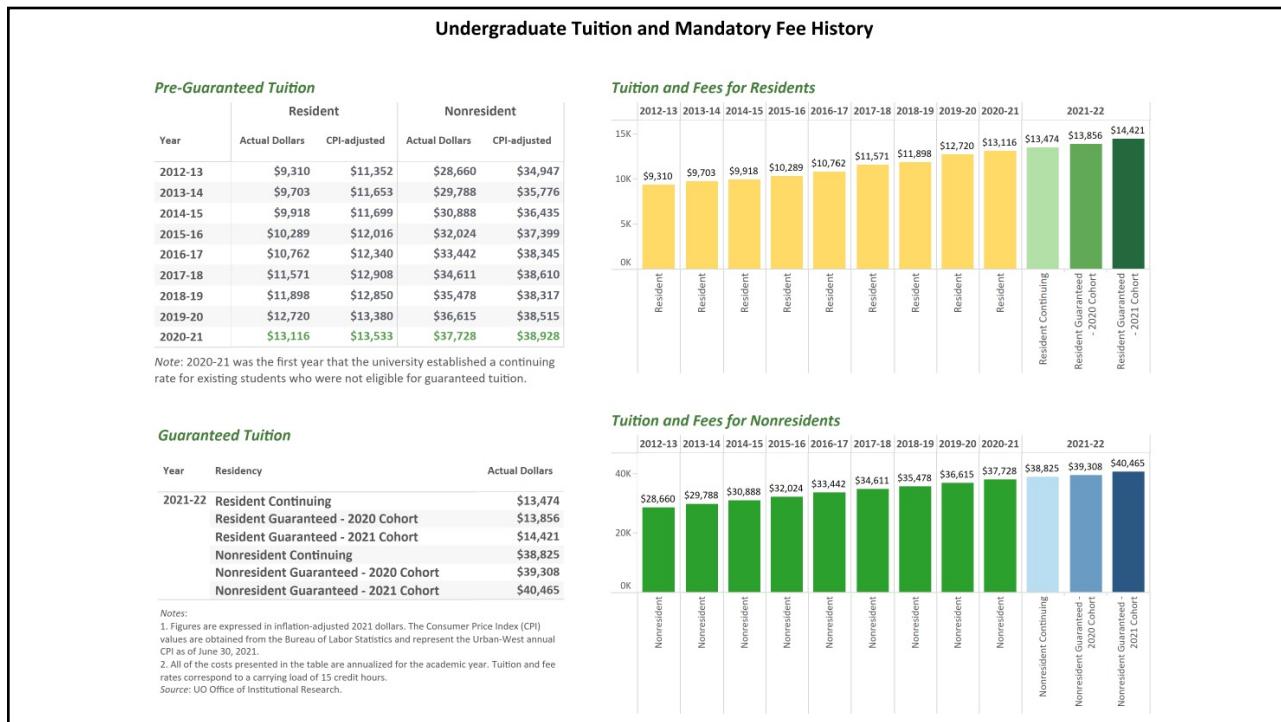
The image shows three screenshots of the University of Oregon communications website. The left screenshot is for a 'Virtual tuition forum for students scheduled for Jan. 11', featuring a photo of the University of Oregon sign and a link to the event on the AroundtheO website. The middle screenshot is for a 'President's Tuition Forum' on February 15, 2022, at 6:00pm, with details about the location (Erb Memorial Union Ballroom) and a virtual attendance option. The right screenshot is for a 'Quick Quack' event on Thursday, February 10, 2022, featuring a cartoon duck logo and a list of 'UO EVENTS'.

6

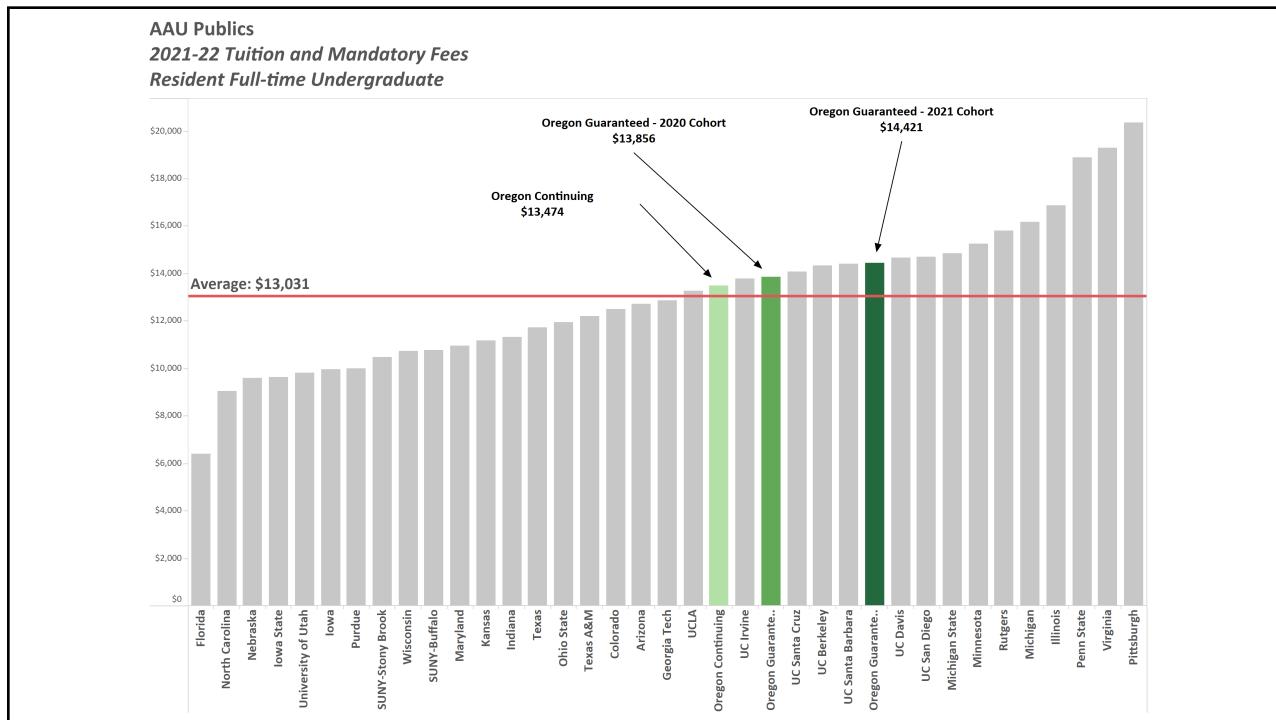
## Agenda

- Tuition and Fee Setting Process
- ➔ • Background Information
  - Historical and Comparative Data
  - E&G Fund Context
- FY23 Major Cost Drivers
- Tuition and Fee Recommendations

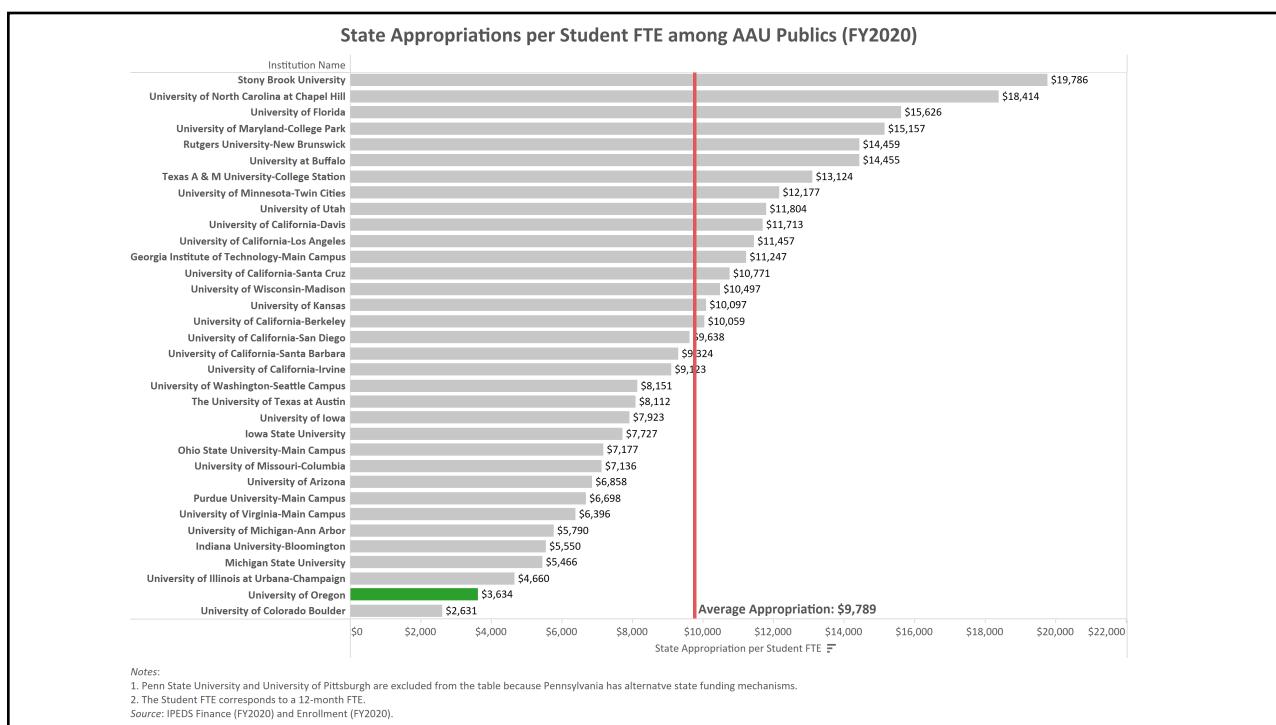
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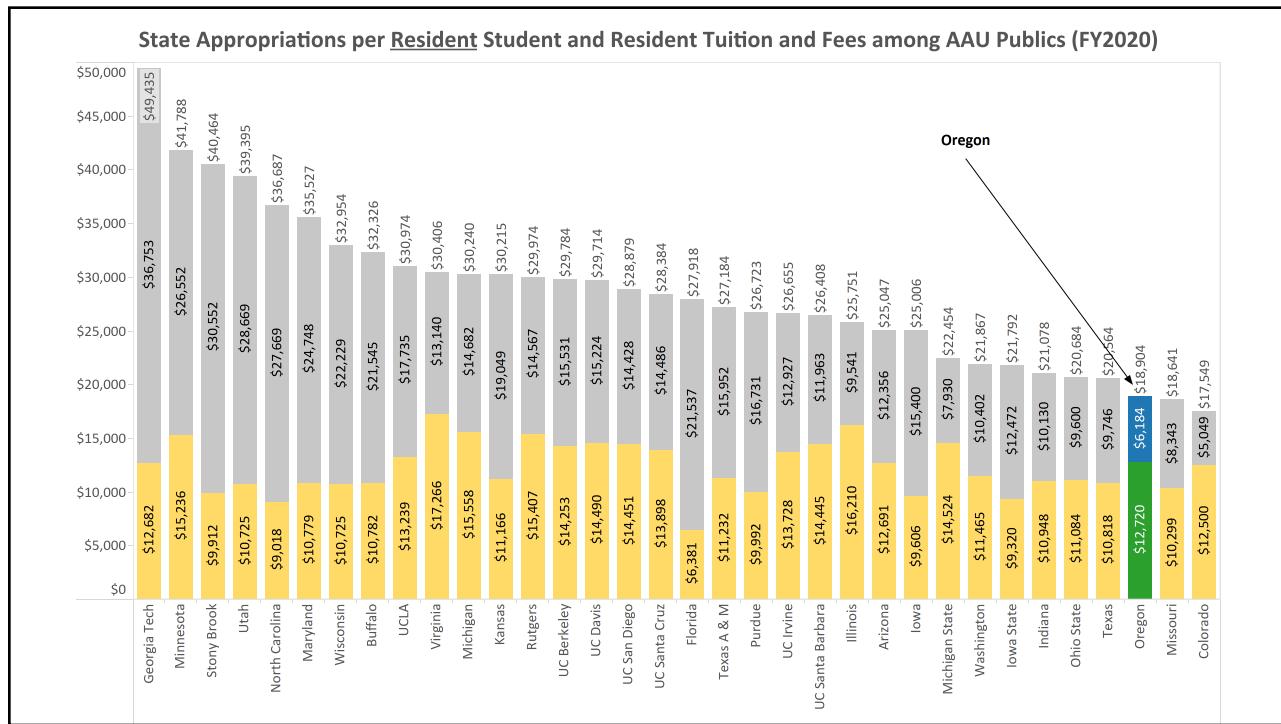
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9



10



11

## **Oregon Public University State Funding, Tuition and Remissions**

	EOU	OIT	WOU	SOU	OSU	PSU	UO <sup>(d)</sup>
AY 2021 Resident FTE	1,313	2,273	2,592	2,158	15,492	12,879	10,509
FY 2021 PUSF State Funding per Resident FTE	\$16,375	\$13,323	\$10,918	\$10,917	\$9,117	\$8,019	\$7,486
AY 2021-22 Resident UG Tuition & Fees <sup>(a)</sup>	\$9,696	\$11,622	\$10,269	\$11,166	\$12,683	\$10,386	\$13,474 / \$13,856 / \$14,421
FY 2021 Remissions per Resident FTE <sup>(b)</sup>	N/A	N/A	\$1,854	\$1,346	\$1,805	\$892	\$2,727
Estimated Net Tuition & Fees <sup>(c)</sup>	N/A	\$0	\$8,415	\$9,820	\$10,879	\$9,494	\$10,747 / \$11,129 / \$11,694

**Notes:**

(a) Resident UG Tuition & Fees are calculated at 15 credits per term during the 2020-21 Academic Year.

(b) Remissions data for EOU and OIT in HECC Financial Conditions Analysis appears anomalous and are omitted from this table.

(c) Estimated Net Tuition & Fees includes published Academic Year 2021-22 Tuition & Fees less FY21 Remissions per Resident FTE where available.

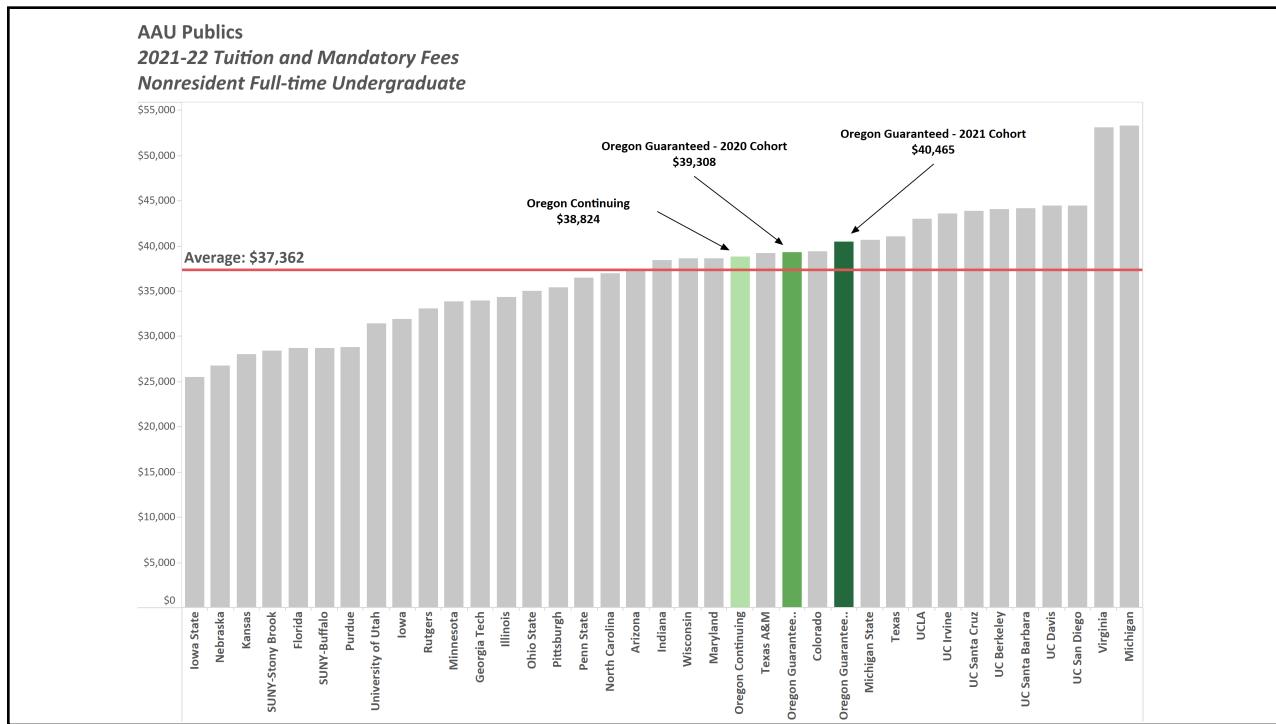
(d) UO Tuition & Fees and Estimated Net Tuition & Fees listed for Continuing, Fall 2020 Cohort, and Fall 2021 Cohort students, respectively.

**Sources:**

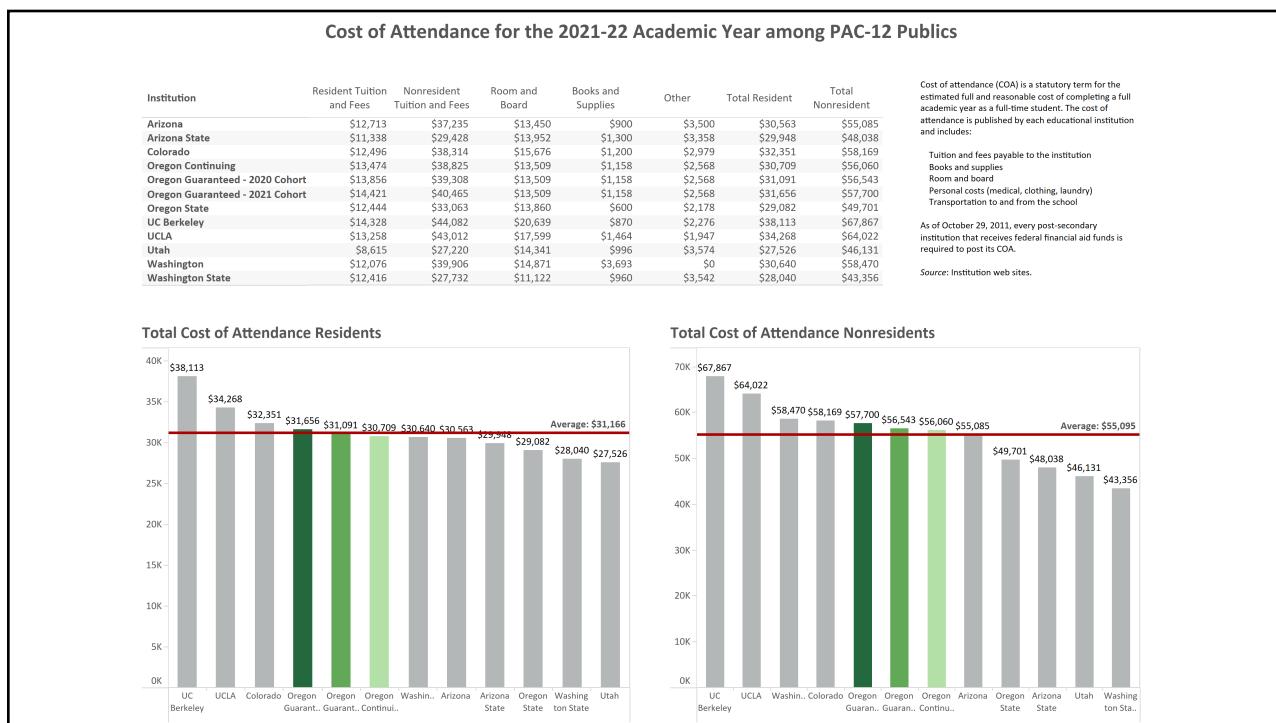
[HECC State Funding and Formula Summary 2021-2023 Biennium](#); [HECC Financial Condition Analysis of Oregon Public Universities 2022](#)

Academic Year 2021-22 Institutional Tuition and Fee Tables.

12



13



14

## Agenda

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- Tuition and Fee Setting Process
- Background Information
  - Historical and Comparative Data
- ➔ • E&G Fund Context
- FY23 Major Cost Drivers
- Tuition and Fee Recommendations

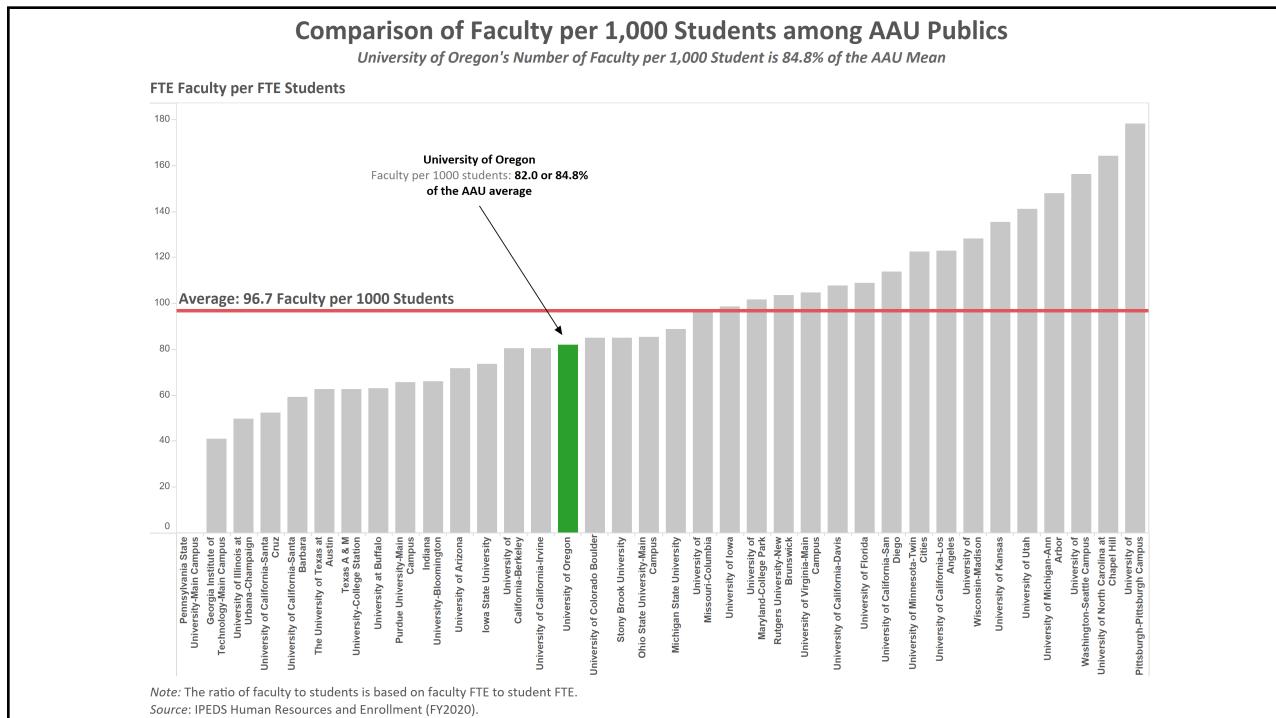
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## E&G Fund Context

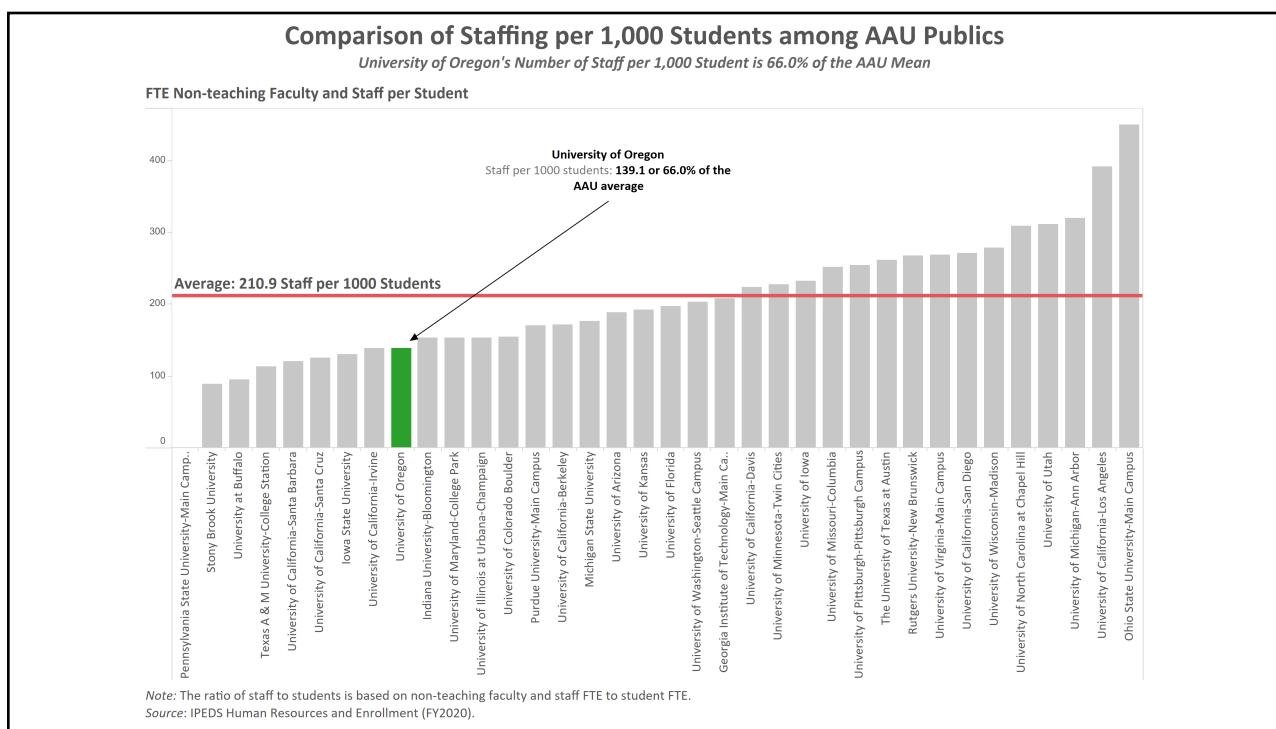
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- E&G Fund – Characteristics (FY22)
  - Approximately \$570 million
  - 77% funded with tuition revenue
  - Funds majority of activity in schools and colleges and administrative units
  - 80% invested in people
- E&G Fund – Recent History
  - FY16, FY17, & FY18: Balanced due to state investments, tuition increases, and budget cuts
  - FY19: \$11.5 million deficit
  - FY20: \$7.6 million deficit
  - FY21: Balanced budget due to actions taken to mitigate impact of COVID-19.

16



17



18

## Agenda

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- Tuition and Fee Setting Process
- Background Information
  - Historical and Comparative Data
  - E&G Fund Context
- ➡ • FY23 Major Cost Drivers
- Tuition and Fee Recommendations

19

### Summary – Major FY2023 E&G Fund Cost Drivers

Cost Driver	Projected FY23 Cost Increase	Notes
Faculty, Staff and GE Salary and OPE	\$15.0 million	E&G employee increases based on collective bargaining agreements for approximately 1,170 graduate employees, 1,663 faculty, and 662 classified staff. Also includes salary increases for approximately 1,098 unrepresented staff. Figures are for employees paid with E&G funds only.
Medical Costs	\$1.6 million	Includes annual weighted increase of 3.1% for December 2021. December 2022 increase assumed to be 3.0%.
Institutional Expenses	\$1.2 million	Increases related to utilities, insurance, debt for academic buildings, assessments, and leases.
Strategic Investments	\$2 million	Allocated via strategic investment process.
Minimum Wage Increase	\$257K	Increases per State of Oregon minimum wage increase to \$14.11/hr including associated OPE. Mainly affects student positions.
<b>Total Projected Cost Increases</b>	<b>\$20.1 million</b>	

20

## Summary – Major FY2023 E&G Fund Cost Drivers

Cost Driver	FY22 Base	Projected FY23 Cost Increase	FY23 % Increase
Faculty, Staff and GE Salary and Wages	\$452.4 million	\$15.0 million	3.3%
Medical Costs	\$54.0 million	\$1.6 million	3.0%
Institutional Expenses	\$36.0 million	\$1.2 million	3.3%
Strategic Investments	\$564.2 million	\$2.0 million	0.4%
Minimum Wage Increase	\$452.4 million	\$257K	0.1%
<b>Totals</b>	<b>\$564.2 million</b>	<b>\$20.1 million</b>	<b>3.56%</b>

21

## Summary – Major FY2023 E&G Fund Cost Drivers

Cost Driver	Projected FY20 Cost Increase	Projected FY21 Cost Increase	Projected FY22 Cost Increase	Projected FY23 Cost Increase
Faculty, Staff and GE Salary and Wages	\$10.6 million	\$11.6 million	\$7.3 million	\$15.0 million
Medical Costs	\$1.9 million	\$2.5 million	\$1.2 million	\$1.6 million
Retirement Costs	\$7.1 million	(\$500K)	-	-
Institutional Expenses	\$1.0 million	\$1.5 million	\$1.2 million	\$1.2 million
Strategic Investments	\$2.0 million	\$2.0 million	\$600K	\$2.0 million
Minimum Wage Increase	\$1.0 million	\$1.9 million	\$320K	\$257K
<b>Total Projected Cost Increases</b>	<b>\$23.6 million</b>	<b>\$19.0 million</b>	<b>\$10.6 million</b>	<b>\$20.1 million</b>

22

## Agenda

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- Tuition and Fee Setting Process
- Background Information
  - Historical and Comparative Data
  - E&G Fund Context
- FY23 Major Cost Drivers
- ➡ • Tuition and Fee Recommendations

23

## Guaranteed Tuition Program Launched 2020

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- Tuition rates set and locked for new undergraduate students in 2020 Tuition Cohort (starting summer 2020 through spring 2021) and 2021 Tuition Cohort (starting summer 2021 through Spring 2022). Rates are locked for five cohort years.

	2020 TUITION COHORT: RATES LOCKED THROUGH SPRING 2025		2021 TUITION COHORT: RATES LOCKED THROUGH SPRING 2026	
	Tuition Rate per SCH	Full-time Annual Tuition Rate	Tuition Rate per SCH	Full-time Annual Tuition Rate
Resident Undergraduates	\$254.62	\$11,457.90	\$266.08	\$11,973.60
Non-resident Undergraduates	\$820.23	\$36,910.35	\$844.83	\$38,017.35

24

## Students who started prior to the Guarantee

- Annual tuition increases for undergraduate students who started prior to the Guaranteed Tuition Program will be locked at 3.0% per year through FY2024

### ANNUAL TUITION INCREASES FOR UNDERGRADUATE STUDENTS WHO STARTED BEFORE SUMMER 2020 LOCKED AT 3.0% PER YEAR

	FY2021 SCH Rate	FY2022 SCH Rate	FY2023 SCH Rate	FY2024 SCH Rate
Resident Undergraduates	\$238.96	\$246.13	\$253.51	\$261.12
Non-resident Undergraduates	\$785.89	\$809.47	\$833.75	\$858.76

25

## Recommended Rates for Incoming UG Tuition Cohort

- Following are the proposed tuition rates for the cohort of incoming undergraduate students (2022 Tuition Cohort):
  - \$870.173 per credit hour (3.0% higher than this year's **non-resident** first-year students)
  - \$278.05 per credit hour (4.5% higher than this year's **resident** first-year students)

2022 Tuition Cohort Full-time <u>resident</u> tuition	2022 Tuition Cohort Full-time <u>non-resident</u> tuition
\$12,512.25	\$39,157.65

- For the incoming undergraduate student cohort, tuition rates and admin-controlled mandatory fees would be **locked for 5 years\***

\* The ASUO incidental fee is not part of the guarantee.

26

## **Admin-Controlled Mandatory Fee Recommendations**

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The following recommendations for administratively-controlled mandatory fees are based on ASUO's original proposal to move funding for the EMU from the Incidental Fee to the Student Union Fee. If the ASUO changes its formal proposal to the President on this matter, the fee recommendations will be adjusted.

27

## **Admin-Controlled Mandatory Fee Recommendations**

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- Under the undergraduate Guaranteed Tuition Program, rates are locked for five years for each Tuition Cohort
- Proposed Administratively Controlled Mandatory Fees for new incoming undergraduate students (2022 Tuition Cohort) is 3.74% increase
- Total proposed increase for administratively controlled mandatory fees for graduate students is 3.0%.
- Undergraduates who started before summer of 2020 have a guaranteed annual total increase of 3.0% increase in fees

28

## Proposed Rates for Admin-Controlled Mandatory Fees (per term)

Administratively Controlled Mandatory Fees	All Graduate Students				Undergraduate Students Who Started Before Summer 2020			New, Incoming Undergraduate Students (2022 Cohort) Locked Fees				
								2021 Tuition Cohort		2022 Tuition Cohort		
	FY2022 Fee	Adjusted Fee Rate FY2022	FY2023 Fee	% Increase	FY2022 Fee	FY2023 Fee	% Increase	FY2022 Fee	Adjusted Fee Rate FY2022	FY2023 Fee	% Increase	
Building Fee	\$ 45.00	-	\$ 45.00	0.00%	\$ 45.00	\$ 45.00	0.00%	\$ 45.00	-	\$ 45.00	0.00%	
Health Service Fee	\$ 236.25	-	\$ 244.75	3.60%	\$ 236.25	\$ 244.75	3.60%	\$ 236.25	-	\$ 246.00	4.13%	
Rec Center Fee	\$ 121.25	-	\$ 124.75	2.89%	\$ 118.50	\$ 122.00	2.95%	\$ 133.00	-	\$ 138.50	4.14%	
Student Union Fee	\$ 80.00	\$ 214.00	\$ 220.50	3.03%	\$ 80.00	\$ 82.50	3.13%	\$ 81.75	\$ 215.75	\$ 224.50	4.06%	
Tech Fee	\$ 51.50	-	\$ 53.00	2.91%	\$ 51.50	\$ 53.00	2.91%	\$ 51.50	-	\$ 53.00	2.91%	
<b>Total ACMF</b>	<b>\$ 534.00</b>	<b>\$ 668.00</b>	<b>\$ 688.00</b>	<b>2.99%</b>	<b>\$ 531.25</b>	<b>\$ 547.25</b>	<b>3.01%</b>	<b>\$ 547.50</b>	<b>\$ 681.50</b>	<b>\$ 707.00</b>	<b>3.74%</b>	
<i>Incidental Fee</i>	\$ 268.25	\$ 134.25	\$ 138.25	2.98%	\$ 268.25	\$ 272.25	1.49%	\$ 268.25	\$ 134.25	\$ 138.25	2.98%	
<b>All Mandatory Fees</b>	<b>\$ 802.25</b>	<b>\$ 802.25</b>	<b>\$ 826.25</b>	<b>2.99%</b>	<b>\$ 799.50</b>	<b>\$ 819.50</b>	<b>2.50%</b>	<b>\$ 815.75</b>	<b>\$ 815.75</b>	<b>\$ 845.25</b>	<b>3.62%</b>	

29

## Honors College Differential Tuition

- Normal university practice is to increase the Honors College differential tuition at same rate as resident tuition
- This year the Honors College is proposing a 0.5% increase. This rate is part of the guaranteed tuition program and will be locked for five years for incoming students (2022 Tuition Cohort).

	Percentage increase	FY2023 Rate	Notes
2020 Tuition Cohort	No increase	\$2,963.25	Rate locked for five years
2021 Tuition Cohort	No increase	\$3,007.71	Rate locked for five years
Continuing students who began prior to Summer 2020	3.0%	\$2,950.36	Rate increases 3.0% per year
Incoming Students (2022 Tuition Cohort)	0.5%	\$3,022.74	Rate will be locked for five years

30

## Graduate Tuition Proposals

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- Most proposed graduate tuition increases for FY23 vary between 0% and 3.1%
- **School of Law:** proposed increases of 5% for all programs
  - Maintain program quality
  - Cover rising operational costs
  - Invest in student success
    - First-year workshops
    - Tutoring
    - Academic and career advising
- **College of Design:** Sports Product Design MS program proposed a flat-fee structure with a tuition guarantee (marketed as such); change will not result in perceived or actual increase for students (no part-time students)

31

## FY23 Proposed Housing Room and Board Rates

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- Housing rate increases vary by room type & meal plan
- Overall average housing rate increase is **about 4%**
- University Housing is working to keep room and board rates as low as possible for the coming academic year

32

## Pac-12 Room and Board Rate Comparisons 2021-22

School	Double Room and Meal Plan	Source for Room and Board Rates
University of California Berkley	\$18,456	<a href="http://financialaid.berkeley.edu/cost-attendance">financialaid.berkeley.edu/cost-attendance</a>
Stanford University	\$17,860	<a href="http://financialaid.stanford.edu/undergrad/budget/index.html">financialaid.stanford.edu/undergrad/budget/index.html</a>
University of Southern California	\$17,731-\$19,739	<a href="http://housing.usc.edu/index.php/sample-cost">housing.usc.edu/index.php/sample-cost</a>
University of California Los Angeles	\$16,763	<a href="https://admission.ucla.edu/tuition-aid">https://admission.ucla.edu/tuition-aid</a>
University of Colorado Boulder	\$15,676	<a href="https://www.colorado.edu/bursar/undergraduate-costs-by-tier">https://www.colorado.edu/bursar/undergraduate-costs-by-tier</a>
University of Washington (Seattle)	\$14,871	<a href="http://www.washington.edu/obp/tuition-fees/estimated-annual-cost-of-attendance-for-first-year-undergraduates">www.washington.edu/obp/tuition-fees/estimated-annual-cost-of-attendance-for-first-year-undergraduates</a>
Arizona State University (Tempe Campus)	\$14,398	<a href="http://students.asu.edu/standard-cost-attendance">students.asu.edu/standard-cost-attendance</a>
University of Utah	\$13,914	<a href="http://financialaid.utah.edu/tuition-and-fees/cost-of-attendance.php">financialaid.utah.edu/tuition-and-fees/cost-of-attendance.php</a>
Oregon State University	\$13,860	<a href="http://financialaid.oregonstate.edu/cost-attendance">financialaid.oregonstate.edu/cost-attendance</a>
University of Oregon	\$13,509	<a href="http://financialaid.uoregon.edu/cost_of_attendance">financialaid.uoregon.edu/cost_of_attendance</a>
University of Arizona	\$13,450	<a href="https://financialaid.arizona.edu/cost/current-undergraduate">https://financialaid.arizona.edu/cost/current-undergraduate</a>
Washington State University	\$11,122	<a href="http://admission.wsu.edu/tuition-costs/tuition-break-down">admission.wsu.edu/tuition-costs/tuition-break-down</a>

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**Board of Trustees of the University of Oregon**

**Resolution: AY2022-2023 Tuition and Fees**

WHEREAS, the Board of Trustees of the University of Oregon (the “Board”) has the authority to determine tuition and mandatory enrollment fees in accordance with ORS 352.087, ORS 352.102, ORS 352.103, ORS 352.105, and other applicable law and policy; and,

WHEREAS, the university’s recommendations regarding tuition and fees are not taken lightly and are developed after robust consultation and inquiry, including the analysis of many factors, including, but not limited to, affordability, state appropriations, rising costs, and appropriate service levels; and,

WHEREAS, the University of Oregon implemented the *Oregon Guarantee* in Fiscal Year 2020-2021 (FY21), which created a stable and predictable tuition and fee model for undergraduate students through fixed, cohort-based tuition and mandatory fee rates for undergraduate students entering the UO during the summer of 2020 or later (and a plan to stabilize tuition and fee increases for undergraduates enrolled in the UO prior to the summer of 2020);

WHEREAS, the university president has submitted recommended tuition and mandatory fee rates for the upcoming academic year (AY22-23), details for which can be found in Exhibits A, B and C attached hereto; and,

WHEREAS, the Board has authority to establish policies for the organization, administration, and development of the university.

NOW, THEREFORE, the Board of Trustees of the University of Oregon hereby approves the following:

1. RESOLVED, that the AY22-23 tuition and mandatory fee schedule provided to the trustees as Exhibit B attached to this resolution is adopted;
2. FURTHER RESOLVED, that AY22-23 Tuition and Fee Policy Book provided to the trustees as Exhibit C attached to this resolution is adopted with an effective date of July 1, 2022, and it shall repeal, supersede, and replace all University of Oregon rules and policies related to subject matters addressed in the Policies therein, except as determined by the President; and
3. FURTHER RESOLVED, that the President and his designee(s) may take all actions necessary to implement and enforce AY22-23 tuition and fees and associated Policies.

*Vote recorded on the following page.*

Moved: \_\_\_\_\_ Seconded: \_\_\_\_\_

Trustee	Vote	Trustee	Vote
Aaron		Lillis	
Boyle		Lo	
Evans Jackman		Madison	
Fick		Murray	
Holwerda		Seeley	
Hornecker		Ralph	
Kari		Worden	

Record here if a voice vote without dissent: \_\_\_\_\_

Dated: \_\_\_\_\_ Initials: \_\_\_\_\_

To: Michael Schill, President  
From: Jamie Moffitt, Vice President for Finance and Administration and CFO, TFAB Co-Chair, and Kevin Marbury, Vice President for Student Life, TFAB Co-Chair  
Date: February 11, 2022  
Re: Recommendations of the FY2022 Tuition and Fee Advisory Board (TFAB)  
Cc: Patrick Phillips, Senior Vice President and Provost

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## Executive Summary

The Tuition and Fee Advisory Board (TFAB) is making the following recommendations related to tuition and mandatory fees:

- ***Incoming Cohort of New Undergraduate Students (2022 Tuition Cohort):***
  - **Non-residents:** The TFAB recommends that the guaranteed tuition rate, which will be locked for five years, be set at a rate that is 3.0% higher than that of the 2021 Tuition Cohort, and that, in total, administratively controlled mandatory fees, which will be locked for five years, be set at a rate that is 3.74% higher than the 2021 Tuition Cohort<sup>1</sup>.
  - **Residents:** The TFAB recommends that the guaranteed tuition rate, which will be locked for five years, be set at a rate that is 4.5% higher than that of the 2021 Tuition Cohort, and that, in total, administratively controlled mandatory fees, which will be locked for five years, be set at a rate that is 3.74% higher than the 2021 Tuition Cohort<sup>2</sup>.

With the guaranteed tuition program, the tuition and fee rates for incoming undergraduate students are locked for five years. The tuition and administratively controlled mandatory fee rates for current first-year and second-year undergraduate students are also locked for five years as part of the program. Tuition and administratively controlled mandatory fee rates for continuing undergraduate students (who started at the institution prior to summer 2020) will increase 3.0% per year for the next two years as previously authorized by the Board of Trustees in March of 2020.

- ***Graduate Students:*** The TFAB supports and includes for your consideration all of the proposed increases for graduate programs outlined herein. All of the proposed increases are 3.1% or less, with the exception of the law programs, which are discussed further in this memo.

<sup>1</sup> This rate is calculated after an appropriate adjustment has been made for the shifting of EMU funding from the Incidental fee to the Student Union Fee.

<sup>2</sup> This rate is calculated after an appropriate adjustment has been made for the shifting of EMU funding from the Incidental fee to the Student Union Fee.

This memo provides detailed information about these recommendations and is organized around the following topics:

- Tuition and Fee Advisory Board Process
- E&G Fund Budget and Financial Information
- FY23 Budget Assumptions
- Other Key Issues Related to Tuition and Fees
- Tuition Scenarios Considered
- Proposed Tuition Increase for Incoming 2022 Tuition Cohort of Undergraduate Students
- Proposed Graduate Tuition Rates
- Fee Increases for Administratively Controlled Mandatory Fees
- Matriculation Fee
- Clark Honors College Differential Tuition
- Other Costs of Education Reviewed
- Tuition and Fee Policy Book

### Tuition and Fee Advisory Board Process

The FY22 Tuition and Fee Advisory Board (TFAB) process launched with five students (one graduate student and four undergraduate students, including the Associated Students of the University of Oregon [ASUO] president and the ASUO finance director), faculty, deans, vice presidents, vice provosts, and administrative staff engaged in budgeting, business affairs, institutional research, and financial aid. A list of TFAB members is included at the end of this memo (Appendix C).<sup>3</sup> Other students, faculty, and staff participated in TFAB meetings as guests throughout the year.

The TFAB met nine times between October 2021 and February 2022. All meetings were open to the public. Fall term meetings were held in person with the option for virtual participation. In winter term, TFAB members were increasingly participating in meetings virtually, which led to some challenges with communication between the in-person and online participants. As a result, the last three meetings of winter term were held virtually using Zoom technology. Guests regularly joined the discussions, including students and a reporter from the *Daily Emerald*. A full list of guests is included at the end of this memo (Appendix D).

Fall 2021 meetings focused on the TFAB charge, historical and comparative information, the university budget, the impact of COVID-19 on institutional finances, mechanisms by which moneys are appropriated by the Legislative Assembly to the Higher Education Coordinating Commission (HECC) for allocation to public universities, the guaranteed tuition program, cost drivers, long-term budget projections, and a plan for cost management. The fall meetings focused on helping TFAB members understand foundational budget information; members who were unable to attend the regularly scheduled meetings were offered make-up sessions with TFAB co-chairs to ensure all members had access to all of the critical background information and training. Winter meetings covered housing rates, proposals related to administratively controlled mandatory fees, proposed course fees and orientation fees, graduate tuition proposals, tuition rates for the new cohort of undergraduate students, as well as planning for and discussing feedback from the student forum on tuition. The TFAB also spent time discussing the trends in domestic, international, and transfer

<sup>3</sup> Due to scheduling issues, Senior Associate Dean Davis replaced Dean Nutter on the TFAB in January 2022. One undergraduate student member withdrew from the TFAB in mid-January due to unforeseen circumstances.

student recruitment and enrollment, how proposed tuition and fee increases compare to other schools, economic pressures including labor costs and inflation, and the financial challenges students face in paying for higher education.

In addition to the nine TFAB meetings, the TFAB and ASUO co-hosted a virtual student forum on the tuition-setting process in mid-January. The forum included a presentation on anticipated cost drivers for the coming year, an overview of the guaranteed tuition program, and information on administratively controlled mandatory fees. Following the presentation, attendees had the opportunity to participate in small-group discussions facilitated by TFAB members in breakout rooms. Feedback from the small-group discussions was discussed by TFAB members at a subsequent meeting. A second student forum, which you will host, is scheduled for Tuesday, February 15.

The university's tuition website (<https://tuition.uoregon.edu/>) was kept updated throughout the 2021-22 TFAB deliberation process, with the meeting schedule posted weeks in advance. In addition to the schedule, the website provided links to meeting agendas and all relevant documents and data that the TFAB considered during deliberations. Meeting summaries from each TFAB session were also posted. Finally, the website provided updated information about tuition and fees, the tuition-setting process, state appropriations, cost drivers, the university's budget, and budget and tuition information for Pac-12 and Association of American Universities (AAU) comparator schools.

As you know, the UO welcomed its second undergraduate tuition cohort in summer/fall 2021 as part of the guaranteed tuition program for undergraduate students. Tuition and administratively controlled mandatory fee rates for students in the 2020 and 2021 tuition cohorts are guaranteed and will not change for five years. The program locks in annual increases in tuition and administratively controlled mandatory fees at 3.0% per year for all other current undergraduate students who started prior to summer 2020. This year, the TFAB focused on developing a recommended tuition rate for the incoming cohort of undergraduate students. The rate that is set for these students will then be locked for a period of five years and will not increase.

### E&G Fund Budget and Financial Information

At the last meeting of the Board of Trustees (December 2021), the projections for the FY22 Education and General (E&G) fund, which covers the majority of the operations of the academic and non-auxiliary administrative functions of the university, forecast a deficit, with projected revenues unable to cover projected expenditures by approximately \$3.7 million. Those projections appear to be improving due to strong student enrollment and reduced compensation costs attributable to hiring challenges.

However, the ongoing uncertainty about the impacts of Covid-19 on student retention, campus activity levels, critical hiring and the institution's finances, combined with the specter of rising inflation make it challenging to predict the financial position of the institution for next year, FY23. In its deliberations, the TFAB considered anticipated FY23 cost drivers (shown below), as well as projected student enrollment and estimated state appropriations.

For FY23, the following major cost increases are projected in the E&G fund:

Cost Driver	Estimated FY23 Cost Increase
Faculty, Staff, and Graduate Employee Salaries and Wages	\$15.0 million
Health Insurance Costs	\$1.6 million
Institutional Expenses	\$1.2 million
Strategic Investments	\$2 million
Minimum Wage Increase	\$257,000
<b>Total Projected Cost Increases</b>	<b>\$20.1 million</b>

The total projected cost driver increases for FY23 are higher than last year (\$10.6 million), mainly due to the resumption of annual salary increases for faculty and staff, as well as the reinstatement of the strategic investment process. For FY23, there are increased costs for Supplies and Services and significant labor cost pressures across the institution. The \$20.1 million projected increase represents a 3.56% increase on the overall E&G fund budget.

#### FY23 Budget Assumptions

Considering the current economic uncertainties facing the university, there are a number of factors that could affect next year's E&G fund budget. Specifically, the following budget factors were considered when discussing scenarios and recommendations around tuition and fees:

- Existing FY22 E&G fund budget gap Up to \$3.7 million
- Net non-recurring COVID expense impacts \$10 million
- Projected FY23 cost drivers \$20.1 million
- Additional investments in student fee remissions \$3.9 million

One budget assumption that was particularly difficult to estimate was the net non-recurring COVID expense impacts. Due to reduced activity on campus and the current labor markets, FY22 E&G fund expenses are running low this year. This is particularly true of compensation costs, as staffing levels at the university are down hundreds of employees. While this reduced level of expenses temporarily benefits the FY22 E&G fund budget, these savings are not recurring, as they will disappear as soon as campus is able to rehire missing faculty and staff and begin more normal activity levels – including travel. TFAB used an estimate of \$10 million for costs that would likely be added back to the FY23 E&G fund budget, in addition to annual inflationary cost drivers. The group discussed the fact that if compensation costs continue to lag in FY22 due to hiring challenges, any associated improvement in the FY22 E&G fund run rate would be offset by an increase in the net non-recurring COVID expense impacts for FY23.

**Fall 2022 enrollment of first-year students:** The TFAB spent quite a bit of time discussing enrollment in the coming year, which will have a very large impact on the financial position of the institution. Assumptions about enrollment levels for the incoming first-year undergraduate class, as well as the entering transfer class, are important because the size of the classes has a significant impact on the E&G fund. In the midst of an ongoing global pandemic, it is difficult to predict the fall 2022 first-year class size. This past fall the university brought in over 4,600 first-year students, which was an extremely large class. However, enrollment levels at community colleges (which affect the pool of

potential future transfer students) are at historic lows, and national projections for undergraduate students are trending downward. The size of the incoming cohort will dramatically impact the UO financial position. Because of the uncertainty, the TFAB considered a broad range of scenarios where first-year enrollment for various groups fluctuated from 45% to 110% of recruitment targets.

**State appropriations:** Currently the university receives approximately \$85.8 million in operating support from the state in the E&G fund. As FY23 will be the second year of the biennium, assuming that the state does not implement any off-cycle budget cuts, the size of the Public University Support Fund (PUSF) is set. The university's allocation of these funds, however, is dependent not only on university activity levels, but also enrollment and graduation rates at the other universities in Oregon. While this makes it difficult to accurately project the FY23 allocation, the TFAB used the Higher Education Coordinating Commission's (HECC's) most recent set of projections, which estimated that the UO allocation would increase by \$4 million in FY23.

**Summer Tuition Revenue:** Due to the pandemic, there was a significant drop in summer school enrollment in the summer of 2021. This makes sense given that most summer school courses were being offered remotely, while fall 2021 classes were scheduled to be mainly conducted in person. For this reason, in discussions of the overall E&G fund budget, the TFAB assumed a rebound of summer 2022 tuition revenue of \$1.5 million, which would place it at a more traditional level of activity.

### Other Key Issues Related to Tuition and Fees

In addition to the budget and financial issues outlined above, TFAB members discussed a number of key issues related to tuition rates and fees. These included:

- (1) ongoing financial challenges faced by students and their families,
- (2) market conditions and the increasing costs of higher education,
- (3) benefits of guaranteed tuition, and
- (4) the necessity of maintaining a funding gap.

**Financial challenges faced by students and families:** TFAB members noted the continued challenges faced by students and families entering the third year of a global pandemic. In particular, the group acknowledged issues around health scares, increased emotional strain and mental health challenges, and the increasing cost of living for students and families in Oregon and beyond.

**Market conditions and the increasing costs of higher education:** Over a series of meetings, TFAB members discussed the university's resident and non-resident tuition rates in relation to comparator schools. The discussions were particularly important because the UO resident undergraduate tuition and mandatory fees for continuing students who started before 2020 as well as for the 2020 and 2021 tuition cohorts are slightly higher than the average rate for AAU public universities. As a result, the group spent a great deal of time discussing the potential impact of further raising tuition and fees in a market of rapidly increasing higher education costs and wider inflationary pressures, and more competitively priced comparator schools. The TFAB expressed concern at raising the rates too high in relation to other comparator schools.

Additionally, the TFAB examined the various factors contributing to the increasing costs of higher education. These include staffing levels and the labor market, as well as inflation, which affects employee salaries, wages, and benefits, that make up the bulk of the Education and General fund budget. TFAB members spent time discussing the need to cover the costs on the institution side

while realizing that the increasing price of higher education places significant burdens on students not on the PathwayOregon program or receiving financial aid.

During discussions about the economy and labor market, some concern was expressed about the risks of large budget gaps over the next several years if inflation does not come down as rapidly as hoped, and at least one committee member therefore felt that larger tuition increases should at least be considered as a way to protect the university fiscally. The point was made that students/parents may well be willing to pay more than at some other schools in order to lock in the guaranteed rate for five years. It was noted that the guarantee has a lot of added value, particularly during times of high inflation or inflationary uncertainty.

**Benefits of guaranteed tuition:** Throughout the discussions about tuition rates, TFAB members noted the benefits of the UO guaranteed tuition program, which offers incoming undergraduate students a fixed rate of tuition and fees that is guaranteed for five years. In an inflationary economy, this transparency and predictability should provide some much-needed certainty regarding the financial costs of undergraduate education for prospective students and their families.

**Funding gap:** Over a number of meetings, TFAB members discussed the realities of a funding gap in FY23 and the short- and long-term impacts on the university's budget. Considering the various economic pressures, scenarios for student recruitment and enrollment, the increasing need to provide scholarships, and the overall desire to offer quality higher education at an affordable price to resident and non-resident students, the TFAB examined scenarios to close the funding gap. Members discussed the need to recruit and retain faculty and staff, and provide the wide-ranging educational and health services needed to support students and ensure overall academic success and career readiness while maintaining an affordable price point. As such, TFAB members noted that it would place significant and potentially unmanageable financial burdens on incoming students and their families to raise tuition rates to try to close the entire projected E&G funding gap in FY23.

### Tuition Scenarios Considered

Given all of these issues, the TFAB reviewed and discussed a broad range of tuition rate scenarios for new undergraduate students entering the UO. Under the guaranteed tuition program, rates would be guaranteed for the incoming 2022 Tuition Cohort for five years. In the discussions of scenarios, the following factors were considered, along with differing assumptions for enrollment, FY22 budget shortfall, and tuition rates for resident and non-resident students:

- new state appropriations: \$4.0 million;
- summer return to pre-Covid levels: \$1.5 million;
- estimated non-recurring COVID-19 expense impacts: \$10 million;
- cost drivers: \$20.1 million; and
- additional undergraduate recruitment investment in fee remissions (scholarships): \$3.9 million.

The TFAB considered the following scenarios:

Tuition Rates		% Target Enrollment First-Year Class			% Target Transfer Enrollment		FY22 projected budget shortfall	Net Budget Gap
New students rate guaranteed for 5 years (% increase & resulting \$ cost per student credit hour)	Resident	Non- resident	Int'l	Resident Transfer	Non- Resident Transfer			
Resident	Non- resident							
3.0% \$274.06	3.0% \$870.17	100	100	100	100	100	(\$3.7m)	(\$7.08m)
2.5% \$272.73	2.5% \$865.95	100	100	100	100	100	(\$3.7m)	(\$7.685m)
2.5% \$272.73	3.0% \$870.17	100	100	100	100	100	(\$3.7m)	(\$7.196m)
3.0% \$274.06	2.5% \$865.95	100	100	100	100	100	(\$3.7m)	(\$7.536m)
3.0% \$274.06	3.5% \$874.40	100	100	100	100	100	(\$3.7m)	(\$6.558m)
3.5% \$275.39	3.5% \$874.40	100	100	100	100	100	(\$3.7m)	(\$6.409m)
3.5% \$275.39	3.0% \$870.17	100	100	100	100	100	(\$3.7m)	(\$6.898m)
4.50% \$278.05	3.0% \$870.17	100	100	100	100	100	(\$3.7m)	(\$6.6m)
4.50% \$278.05	3.0% \$870.17	100	105	100	100	100	(\$3.7m)	(\$2.336m)
4.50% \$278.05	3.0% \$870.17	100	100	100	100	100	-	(\$2.923m)
4.50% \$278.05	3.0% \$870.17	100	105	100	100	100	-	(\$1.341m)
4.50% \$278.05	3.0% \$870.17	100	105	45	100	100	-	(\$3.44m)
4.50% \$278.05	3.0% \$870.17	100	105	70	100	100	-	(\$1.27m)
4.50% \$278.05	3.0% \$870.17	100	103	45	100	100	-	(\$5.15m)
4.50% \$278.05	3.0% \$870.17	100	103	70	100	100	-	(\$2.97m)
4.50% \$278.05	3.0% \$870.17	95	103	70	100	100	-	(\$4.20m)
4.50% \$278.05	3.0% \$870.17	100	102	70	95	95	-	(\$4.495m)

Tuition Rates		% Target Enrollment First-Year Class			% Target Transfer Enrollment		FY22 projected budget shortfall	Net Budget Gap
New students rate guaranteed for 5 years (% increase & resulting \$ cost per student credit hour)		Resident	Non- resident	Int'l	Resident Transfer	Non- Resident Transfer		
Resident	Non- resident							
4.50% \$278.05	3.0% \$870.17	100	100	73	100	100	-	(\$5.27m)
4.50% \$278.05	3.0% \$870.17	100	100	65	100	100	-	(\$5.966m)
4.75% \$278.72	3.0% \$870.17	98	103	65	100	100	-	(\$3.824m)
5.0% \$279.38	5.0% \$887.07	98	103	65	100	110	-	(\$1.112m)
5.0% \$279.38	5.0% \$887.07	99	103	45	100	110	-	(\$2.639m)
4.75% \$278.72	4.75% \$884.96	99	103	45	100	110	-	(\$2.953m)
4.75% \$278.72	4.75% \$884.96	99	101	70	100	100	-	(\$3.167m)
4.75% \$278.72	4.75% \$884.96	99	100	70	100	100	-	(\$4.035m)
4.75% \$278.72	3.0% \$870.17	99	103	45	100	110	-	(\$4.639m)
4.75% \$278.72	3.0% \$870.17	99	103	45	90	110	-	(\$5.302m)
4.50% \$278.05	3.0% \$870.17	100	102	65	97	97	-	(\$4.662m)
4.50% \$278.05	3.0% \$870.17	100	104	65	97	97	-	(\$2.956m)
4.50% \$278.05	3.0% \$870.17	100	104	50	97	97	-	(\$4.260m)
4.50% \$278.05	3.25% \$872.29	100	102	65	97	97	-	(\$4.421m)
4.50% \$278.05	3.50% \$874.40	100	102	65	97	97	-	(\$4.180m)
4.50% \$278.05	3.0% \$870.17	100	102	65	97	97	-	(\$4.661m)

## Proposed Tuition Increase for Incoming 2022 Tuition Cohort of Undergraduate Students

The TFAB recommends the following guaranteed tuition rates for the 2022 Tuition Cohort of undergraduate students:

- **Resident tuition:** The TFAB recommends the guaranteed resident rate for the 2022 Tuition Cohort be set at \$278.05 per student credit hour (4.5% above the 2021 Tuition Cohort rate). This tuition rate is guaranteed for five years and will not increase during that time. Annual full-time tuition for new resident undergraduates will be locked at \$12,512.25—for five cohort years.
- **Non-resident tuition:** The TFAB recommends the guaranteed non-resident rate for the 2022 Tuition Cohort be set at \$870.17 per student credit hour (3.0% above the 2021 Tuition Cohort rate). This tuition rate is also guaranteed for five years and will not increase during that time. Annual full-time tuition for new non-resident undergraduates will be \$39,157.65—guaranteed for five cohort years.

## Proposed Graduate Tuition Rates

Deans were asked to provide their recommendations for graduate tuition rates for FY23, based on market rates and pricing relevant to their specific degrees and budget situation. The graduate tuition rates were reviewed and discussed by the TFAB during multiple meetings in winter term. There are over 55 separate tuition rates for UO graduate programs. With the exception of programs in the School of Law (Law hereafter), proposed graduate tuition increases range from 0% to 3.1%. A summary of the proposed tuition rates for the graduate programs is included at the end of this memo (Appendix B). The TFAB held a separate session with the dean of Law to discuss proposed FY23 tuition rates.

### ***School of Law***

Law is proposing 5.0% increases for resident and non-resident students in its Juris Doctorate (JD), Master of Laws (LLM), and Conflict and Dispute Resolution Master's programs. During a discussion of the proposals with the TFAB, Dean Burke explained that the increases are needed to maintain program quality, cover rising operational costs, and continue to invest in the success of the students. For example, additional staffing to support student success—first-year workshops, tutoring, and academic and career advising—across all programs. Dean Burke also shared the school's success in lowering its discount rate in recent years, and the number of students currently receiving scholarships. The TFAB members discussed the potential impact that the proposed price increase could have on market competitiveness, as well as the financial challenges the increases would present to existing and incoming law students. The TFAB was generally supportive of the proposed increases by Law.

### ***Sports Product Design MS Program***

The Sports Product Design (SPD) MS program located in Portland proposes amending their tuition model to a flat fee structure, with a tuition guarantee. The SPD tuition model was updated in 2018 and the program managers intended it to be set up with a flat fee structure; however, it was instead set up with a tuition plateau between 9-16 credits. The SPD program is currently marketed and communicated to applicants and incoming students as a flat-fee model. SPD is a full-time MS program with a prescribed course load and no part-time students. As there are no part-time students

in the program and applicants and students already believe the program has a flat fee structure, movement to a flat rate will not result in either a perceived or actual increase for the students.

The TFAB recommends that the graduate and Law recommendations be adopted.

### Fee Increases for Administratively Controlled Mandatory Fees

The TFAB reviewed the proposals for administratively controlled mandatory fees, with the exception of the Incidental Fee, which runs through the ASUO process. Administratively controlled mandatory fees are part of the guaranteed tuition program—the rates that are set for the incoming 2022 Tuition Cohort of undergraduate students will be locked for five years. Fee rates paid by current first-year and second-year students are already locked for five years and will not change.

As a result, the TFAB only needed to consider FY23 rates for the following groups of students:

- incoming cohort of undergraduate students,
- continuing undergraduate students (those who started at the university prior to the summer of 2020),<sup>4</sup> and
- graduate students.

Each unit proposing increases to administratively controlled mandatory fees presented these increases to the TFAB, giving members the opportunity to ask questions and discuss the proposals. TFAB members were generally supportive of the mandatory fee increases, understanding the intense labor pressures and other cost increases facing all parts of the university. TFAB members expressed support for important investments in health services, technology infrastructure, recreation, and student union services. Members acknowledged the efforts to keep increases as low as possible while continuing to offer high-quality services to continuing and incoming students. Note that the fees for the new, incoming undergraduate students (2022 Tuition Cohort) will be locked for five years under the guaranteed tuition program.

Below is a brief summary of key issues noted about each proposal.

#### ***Building Fee:*** No increase

***Health Service Fee:*** The proposed increase is 3.6% for graduate students and undergraduates who started before summer 2020 (\$8.50 per term) and 4.13% for new, incoming undergraduate students (\$9.75 per term). The increase is an attempt to respond to the growing need for health services among students and is reflective of the efforts by University Health Services to manage labor costs and general expenses while working to provide a broad spectrum of services, including mental health services.

<sup>4</sup> As part of the guaranteed tuition program for undergraduate students who started prior to the summer of 2020, the annual total increase in administratively controlled mandatory fees was locked in at 3.0% per year. The TFAB, however, reviews how that 3% is allocated each year between fees.

**Recreation Center Fee:** The proposed increase varies by student group.

- Incoming undergraduate cohort: 4.14% (\$5.50 per term) – this rate will be locked for five years.
- Continuing undergraduates who started before summer 2020: 2.95% (\$3.50 per term)
- Graduate students: 2.89% (\$3.50 per term)

The proposed increases aim to cover cost-of-living allowance (COLA) increases and a planned increase in the minimum wage, which affects the student employee labor force at the Recreation Center. The increases also help to offset the center's lack of revenue from conferences and locker fees resulting from the ongoing pandemic.

**Student Union Fee:**

Following extensive discussions between the Associated Students of the University of Oregon (ASUO) and the Division of Student Life, an agreement was reached to transition the Erb Memorial Union (EMU) off the Incidental Fee (I-Fee). EMU funding obligations require more of each year's I-Fee increase, which reduces the available funds for other ASUO programs and services. As such, starting in FY23 funding for the EMU previously covered by the I-Fee will be moved to the Student Union Fee.

The guaranteed tuition cohorts of 2020 and 2021 and continuing undergraduates who started before 2020 will see no changes in their locked administratively controlled fees as a result of this transition—revenue will be moved to the appropriate unit by budget transfer after fees are collected.

Current and incoming graduate students and incoming undergraduate students will pay mandatory fees reflecting the new agreement, meaning the Student Union Fee will be higher than last year but will be offset by the lower Incidental Fee. The percentage increase across all mandatory fees is similar to past years. In Appendix A you will find the memo with more details that was provided to the TFAB.

The FY2022 Student Union fee rate has been adjusted for graduate students and new, incoming undergraduate students, to reflect the agreement outlined above. As described, there is no adjustment for undergraduate students who started before summer 2020 or for undergraduates whose fees are already locked as part of the tuition guarantee. After the adjustment, the proposed Student Union increase varies by student group, as follows:

- Incoming undergraduate cohort: 4.06% (\$8.75 per term) – this will be locked for five years
- Continuing undergraduates: 3.13% (\$2.50 per term)
- Graduate students: 3.03% (\$6.50 per term)

The proposed increases to the Student Union Fee will help the EMU manage the same wage and labor pressures faced by the rest of the university and the wider labor market. The transition of the EMU from the I-Fee to the Student Union Fee should make it easier for new and existing students to understand the resources being invested in the student union.

**Technology Fee:** The proposed increase to the technology fee is \$1.50 per term, which represents a 2.91% increase for all groups of students. This is only the second increase since 2017 and will be used for crucial investments in cybersecurity tools, mission-critical software, and infrastructure

replacement as technology ages. The cost of products and services in this area are facing the same inflationary pressures as those in other areas.

**Summary:** Graduate students will see the total of all administratively controlled mandatory fees increase by 3.0% for FY23. Continuing undergraduate students who started prior to summer of 2020 will see the total of all administratively controlled mandatory fees increase by 3.0%. The incoming 2022 Tuition Cohort will have a fee increase of 3.74% compared to the rate of the previous cohort. For the incoming cohort, the fee rate will be locked in for five years as part of the guaranteed tuition program. Current first-year and second-year students will see no increase to administratively controlled mandatory fees.

The following is a summary of proposed rates for existing mandatory fees for FY2023:

Administratively Controlled Mandatory Fees	All Graduate Students				Undergraduate Students Who Started Before Summer 2020				New, Incoming Undergraduate Students (2022 Cohort) Locked Fees				
	FY2022		Adjusted Fee Rate FY2022		FY2023		% Increase		FY2022		FY2023		% Increase
	Fee	Fee	Fee	Fee	Fee	Fee	Fee	Fee	Fee	Fee	Fee	Fee	Fee
Building Fee	\$ 45.00	-	\$ 45.00		0.00%	\$ 45.00	\$ 45.00	0.00%	\$ 45.00	-	\$ 45.00		0.00%
Health Service Fee	\$ 236.25	-	\$ 244.75		3.60%	\$ 236.25	\$ 244.75	3.60%	\$ 236.25	-	\$ 246.00		4.13%
Rec Center Fee	\$ 121.25	-	\$ 124.75		2.89%	\$ 118.50	\$ 122.00	2.95%	\$ 133.00	-	\$ 138.50		4.14%
Student Union Fee	\$ 80.00	\$ 214.00	\$ 220.50		3.03%	\$ 80.00	\$ 82.50	3.13%	\$ 81.75	\$ 215.75	\$ 224.50		4.06%
Tech Fee	\$ 51.50	-	\$ 53.00		2.91%	\$ 51.50	\$ 53.00	2.91%	\$ 51.50	-	\$ 53.00		2.91%
<b>Total ACMF</b>	<b>\$ 534.00</b>	<b>\$ 668.00</b>	<b>\$ 688.00</b>		<b>2.99%</b>	<b>\$ 531.25</b>	<b>\$ 547.25</b>	<b>3.01%</b>	<b>\$ 547.50</b>	<b>\$ 681.50</b>	<b>\$ 707.00</b>		<b>3.74%</b>
<i>Incidental Fee</i>	\$ 268.25	\$ 134.25	\$ 138.25		2.98%	\$ 268.25	\$ 272.25	1.49%	\$ 268.25	\$ 134.25	\$ 138.25		2.98%
<b>All Mandatory Fees</b>	<b>\$ 802.25</b>	<b>\$ 802.25</b>	<b>\$ 826.25</b>		<b>2.99%</b>	<b>\$ 799.50</b>	<b>\$ 819.50</b>	<b>2.50%</b>	<b>\$ 815.75</b>	<b>\$ 815.75</b>	<b>\$ 845.25</b>		<b>3.62%</b>

**Incidental Fee:** The Incidental Fee (I-Fee) proposal is developed by the ASUO and does not run through the TFAB review process.<sup>5</sup>

#### Matriculation Fee

The matriculation fee paid by all new students is traditionally increased at the same rate as the increase to undergraduate resident tuition. We are recommending that the institution continue this practice in FY23. Students only pay the matriculation fee once, in their first term.

#### Clark Honors College Differential Tuition

As with the matriculation fee, the differential tuition paid by Clark Honors College students is traditionally increased at the same rate as the increase to undergraduate resident tuition. For the 2022 Tuition Cohort, the Clark Honors College is instead recommending a 0.5% increase from the 2021 cohort rate. This would result in a tuition charge of \$1,007.58 per term for new, incoming students. As the Honors College differential tuition is part of the guaranteed tuition program, the rate charged to the entering cohort of students will be locked for five years.

<sup>5</sup> The language in the ASUO recommendation was for a 3% or \$4.00 increase. The numbers reflect a 2.98% increase; the difference is accounted for in rounding.

### Other Costs of Education Reviewed

The TFAB reviewed major changes to proposed course fees and other fees (e.g., orientation fees), as well as projections on housing costs for FY23. The group discussed some specific course fees where questions arose; this feedback will be incorporated into the Special Fees, Fines, and Penalties process for consideration.

University Housing presented to the TFAB the proposed room and board rates, including a summary of percentage increases, for FY23. Housing rate increases vary by room type and meal plan, but the overall average increase is about 4.0%. This is slightly higher than last year's increase of 3.5% but still keeps UO housing costs one of the lowest in the Pac-12. The TFAB discussed the current labor shortages in UO Housing, recent contract negotiations that increased minimum wages and included cost-of-living allowance increases, and the potential long-term impact of increasing labor costs overall. TFAB members discussed the housing proposal and were generally supportive, particularly considering the efforts being made to address student food insecurity issues with affordable Housing and Dining packages and efforts to keep housing rates as affordable as possible.

### Tuition and Fee Policy Book

Delays in the finalization of the Tuition and Fee Policy Book mean that the TFAB did not have the opportunity to review proposed changes to the policy book during scheduled winter meetings. TFAB members will be given the opportunity to provide suggested edits and comments on a proposed updated draft of the Tuition and Fee Policy Book later in February.

## Appendix A: Memo on the Transition of the EMU Budget from the I-Fee to the Student Union Fee

### **Updated Fee Request to TFAB**

#### **Impact of transition of EMU budget from the Incidental Fee to the Student Union Fee**

After extensive discussions, Vice President for Student Life Kevin Marbury and ASUO President Isaiah Boyd reached an agreement to transition the Erb Memorial Union (EMU) off the Incidental Fee (I-Fee). This change will reduce the Incidental Fee and increase the Student Union Fee by an amount per student per term needed to offset the EMU's current Incidental Fee allocation. President Schill, who must approve the change, has indicated he is in support of the change and asked us to proceed.

This change is necessary due to the fact that EMU funding obligations are requiring more and more of each year's Incidental Fee increase go to the EMU, which dramatically reduces available funds for other ASUO programs and services. By moving the EMU to the Student Union Fee, a more moderate increase in the I-Fee nets more money for ASUO programs and services.

By way of example, the current Incidental Fee is \$268.25. In order to meet reserve, overhead and current service level (CSL) obligations, the ASUO must raise the Incidental Fee by 3.5% and after the EMU is funded, a 3.5% increase leaves only \$32,593 to allocate for the rest of the ASUO budget. On the other hand, if the EMU were not being funded by the Incidental Fee, that same 3.5% increase would generate \$301,664 to allocate on programs and services.

The current model requires the ASUO to raise the I-Fee higher and higher in order to cover both the EMU and have enough money left for other programs and services. The chart below shows that by moving the EMU to the Student Union Fee, a more moderate increase in the I-Fee nets more money.

With EMU on Incidental Fee	I-Fee % Increase	Amount generated by raising I-Fee	\$ available to allocate beyond the EMU
\$452,911 (EMU Dec Request)	5.0%	\$861,096	\$273,872
	4.0%	\$688,877	\$113,019
	3.5%	\$602,767	\$32,593
	3.0%	\$516,658	-\$47,834
Without EMU on Incidental Fee	I-Fee % Increase	Amount generated by raising I-Fee	\$ available to allocate beyond the EMU
	5.0%	\$430,949	\$430,949
	4.0%	\$344,759	\$344,759
	3.5%	\$301,664	\$301,664
	3.0%	\$258,570	\$258,570

This change will be implemented beginning with the 22-23 academic year as follows:

#### **Guaranteed Tuition Undergraduate Cohort 2020 (FY21) and 2021 (FY22)**

As the name suggests, we will not change the Administratively Controlled Mandatory Fees (ACMF) established and previously approved for the first two Guaranteed Tuition cohorts. However, in order to correctly fund both the EMU and ASUO budgets, we will make a funding adjustment after the fees have been collected in BANNER by moving some funds collected under the Incidental Fee to the EMU while the rest go to the ASUO.

The per-student-per-term amount of the current Incidental Fee that supports the EMU budget is \$134. That amount will be locked in for both cohorts. The Incidental Fee has and can be increased going forward, as it is not part of the guaranteed tuition program. For budgeting and calculation purposes, the current Incidental Fee of \$268.25 will be reduced by \$134.00 to \$134.25 to reflect the post-transition starting point. Once the ASUO decides on its fee recommendation for next year, the *ASUO portion* of Incidental Fee will increase accordingly. Again, the students in these two cohorts will not see any change on the administratively controlled fees; we will move the revenue to the appropriate unit once fees are collected through a budget transfer in BANNER.

The chart below shows this in more detail. Future amounts in the tables are a projection, for illustration purposes. Projections in the charts below assume a 3% annual increase for the I-Fee. The exact increase will be determined each year through ASUO budgeting process.

Fall 2020 Cohort (FY21)					
Fee	FY2021	FY2022	FY2023	FY2024	FY2025
Building	\$ 45.00	\$ 45.00	\$ 45.00	\$ 45.00	\$ 45.00
Health Service	\$ 233.25	\$ 233.25	\$ 233.25	\$ 233.25	\$ 233.25
Rec Center	\$ 120.88	\$ 120.88	\$ 120.88	\$ 120.88	\$ 120.88
Student Union	\$ 78.54	\$ 78.54	\$ 78.54	\$ 78.54	\$ 78.54
Technology	\$ 50.00	\$ 50.00	\$ 50.00	\$ 50.00	\$ 50.00
Total ACMF	\$ 527.67	\$ 527.67	\$ 527.67	\$ 527.67	\$ 527.67
Incidental Fee	\$ 271.75	\$ 268.25	\$ 272.25	\$ 276.40	\$ 280.67
Locked I-Fee Amount in for EMU	\$ 134.00	\$ 134.00	\$ 134.00	\$ 134.00	\$ 134.00
Annual I-Fee Amount (goes up)	\$ 134.25	\$ 138.25	\$ 142.40	\$ 146.67	
Total All Fees	\$ 799.42	\$ 795.92	\$ 799.92	\$ 804.07	\$ 808.34

Fall 2021 Cohort (FY22)					
Fee	FY2022	FY2023	FY2024	FY2025	FY2026
Building	\$ 45.00	\$ 45.00	\$ 45.00	\$ 45.00	\$ 45.00
Health Service	\$ 236.25	\$ 236.25	\$ 236.25	\$ 236.25	\$ 236.25
Rec Center	\$ 133.00	\$ 133.00	\$ 133.00	\$ 133.00	\$ 133.00
Student Union	\$ 81.75	\$ 81.75	\$ 81.75	\$ 81.75	\$ 81.75
Technology	\$ 51.50	\$ 51.50	\$ 51.50	\$ 51.50	\$ 51.50
Total ACMF	\$ 547.50	\$ 547.50	\$ 547.50	\$ 547.50	\$ 547.50
Incidental Fee	\$ 268.25	\$ 272.25	\$ 276.40	\$ 280.67	\$ 285.07
Locked I-Fee	\$ 134.00	\$ 134.00	\$ 134.00	\$ 134.00	\$ 134.00
Annual I-Fee	\$ 134.25	\$ 138.25	\$ 142.40	\$ 146.67	\$ 151.07
Total All Fees	\$ 815.75	\$ 819.75	\$ 823.90	\$ 828.17	\$ 832.57

## Undergraduate Students Who Started Before 2020

Continuing undergraduates who started at the UO before 2020 also have a guarantee. They were promised Administratively Controlled Mandatory Fees would not increase more than 3% a year. This agreement will also stay in place. The same methodology (splitting the I-Fee into two parts, one locked in (EMU portion) and one that could increase (Incidental Fee portion). As we noted above, the students in this group will not see any change on the Administratively Controlled Mandatory Fees; we will move the associated revenue to the appropriate unit once fees are collected through a budget transfer in BANNER. The chart below shows this in more detail. Projections in the charts below assume a 3% annual increase for the I-Fee. Exact increase will be determined each year through ASUO budgeting process.

	<b>FY2022</b>	<b>FY2023</b>	<b>% Increase</b>
<b>Fee</b>	<b>Rates</b>	<b>Rates</b>	<b>over Prior Year</b>
Building	\$ 45.00	\$ 45.00	0.00%
Health Service	\$ 236.25	\$ 244.75	3.60%
Rec Center	\$ 118.50	\$ 122.00	2.95%
Student Union	\$ 80.00	\$ 82.50	3.13%
Technology	\$ 51.50	\$ 53.00	2.91%
<b>Total AMCF</b>	<b>\$ 531.25</b>	<b>\$ 547.25</b>	<b>3.01%</b>
Incidental Fee	\$ 268.25	\$ 272.25	1.49%
Locked I-Fee	\$ 134.00	\$ 134.00	0.00%
Annual I-Fee	\$ 134.25	\$ 138.25	2.98%
<b>All Mandatory Fees</b>	<b>\$ 799.50</b>	<b>\$ 819.50</b>	<b>2.50%</b>

## Graduate Students

Current and incoming graduate students will pay Mandatory Fees that reflect this transition. The Student Union Fee will be higher than last year but offset by the lower Incidental Fee (new students may not notice this). Once we reset the two fees to the transition rate (the current Student Union Fee plus \$134 and current Incidental Fee minus \$134) we then applied a 3.03% increase to the Student Union Fee for graduate students. This is 0.1% lower than the percentage previously presented by Kevin Marbury to TFAB (3.13%). While the shifting of fees results in a sizable percentage increase on the Student Union Fee and the Administratively Controlled Mandatory Fees, the percentage increase across all Mandatory Fees is similar to past years. Projections in the chart below assume a 3% annual increase for the I-Fee. The exact increase will be determined each year through ASUO budgeting process.

	<b>FY2022</b>	<b>Adj Fee</b>	<b>FY2023</b>	<b>% Increase</b>
<b>Fee</b>	<b>Rates</b>	<b>Rates</b>	<b>Projected Rates</b>	<b>over Prior Year</b>
Building	\$ 45.00	\$ 0.00	\$ 45.00	0.00%
Health Service	\$ 236.25	\$ 0.00	\$ 244.75	3.60%
Rec Center	\$ 121.25	\$ 0.00	\$ 124.75	2.89%
Student Union	\$ 80.00	\$ 214.00	\$ 220.50	3.03%*
Technology	\$ 51.50	\$ 0.00	\$ 53.00	2.91%
<b>Total ACMF</b>	<b>\$ 534.00</b>	<b>\$ 668.00</b>	<b>\$ 688.00</b>	<b>2.99%</b>

\* Transition rate calculation increase from \$80 to \$220.50 is 175.63%

<i>(cont. from above)</i>	<b>FY2022</b>	<b>Adj Fee</b>	<b>FY2023</b>	<b>% Increase</b>
<b>Fee</b>	<b>Rates</b>	<b>Rates</b>	<b>Rates</b>	<b>over Prior Year</b>
Incidental Fee	\$ 268.25	\$ 134.25	\$ 138.25	2.98%**
**Transition rate calculation increase from \$268.25 to \$134.25 is -48.46%				
<b>All Mandatory Fees</b>	<b>\$ 802.25</b>		<b>\$ 826.25</b>	<b>3.00%</b>

Total ACMF (before adjustment)	\$ 534.00	\$ 550.00	3.00%
Total ACMF (after adjustment)	\$ 534.00	\$ 688.00	28.84%

### **Incoming Guaranteed Tuition Undergraduate Cohort 22 (FY23)**

Incoming undergraduate students will also pay Mandatory Fees that reflect this transition. Again, the Student Union Fee will be higher than last year but offset by the lower Incidental Fee (new students may not notice this). Once we reset the two fees to the transition rate (the current Student Union Fee plus \$134 and current Incidental Fee minus \$134) we then applied a 4.06% increase to the new cohort. This is 0.53% lower than the percentage increase previously presented by Kevin Marbury to TFAB (4.59%). While the shifting of fees results in a sizable percentage increase on the Student Union Fee and the Administratively Controlled Mandatory Fees, the percentage increase across all Mandatory Fees is similar to past years. The chart below shows this in more detail.

	<b>2021 Tuition Cohort (FY22)</b>	<b>Adj Fee</b>	<b>2022 Tuition Cohort (FY23)</b>	<b>% Increase</b>
	<b>Rates</b>	<b>Rates</b>	<b>Rates</b>	<b>over Prior Year</b>
Building	\$ 45.00	\$ 0.00	\$ 45.00	0.00%
Health Service	\$ 236.25	\$ 0.00	\$ 246.00	4.13%
Rec Center	\$ 133.00	\$ 0.00	\$ 138.50	4.14%
Student Union	\$ 81.75	\$ 215.75	\$ 224.50	4.06%
Technology	\$ 51.50	\$ 0.00	\$ 53.00	2.91%
<b>Total ACMF</b>	<b>\$ 547.50</b>	<b>\$ 681.50</b>	<b>\$ 707.00</b>	<b>3.74%</b>
Incidental Fee	\$ 268.25	\$ 134.25	\$ 138.25	2.98%
<b>All Mandatory Fees</b>	<b>\$ 815.75</b>		<b>\$ 845.25</b>	<b>3.62%*</b>

\*If the Incidental Fee recommendation is higher than 3%, the total Mandatory Fee percentage increase will be higher.

Total ACMF (before adjustment)	\$ 547.50	\$ 568.00	3.74%
Total ACMF (after adjustment)	\$ 547.50	\$ 707.00	29.13%

Appendix B: 2022-23 Academic Year Graduate Tuition Increase Proposals

**2022-23 ACADEMIC YEAR TUITION AND FEE INCREASES**

**ACADEMIC YEAR**

	2021-22 Tuition	2022-23 Tuition	Tuition Pct Increase
<b>GRADUATE (annual tuition and fees at the plateau rate)</b>			
<b>COLLEGE OF DESIGN</b>			
<i>Architecture &amp; Interior Architecture</i>			
Resident	23,685.00	23,847.00	0.7%
Nonresident	34,551.00	34,848.00	0.9%
<i>Landscape Architecture</i>			
Resident	19,086.00	19,248.00	0.8%
Nonresident	30,552.00	30,849.00	1.0%
<i>Historic Preservation</i>			
Resident	17,937.00	18,099.00	0.9%
Nonresident	29,553.00	29,850.00	1.0%
<i>Art</i>			
Resident	17,403.00	17,403.00	0.0%
Nonresident	19,023.00	19,023.00	0.0%
<i>Sports Product Design</i> <sup>1</sup>			
Resident	35,313.00	35,313.00	0.0%
Nonresident	35,313.00	35,313.00	0.0%
<i>Planning, Public Policy, &amp; Management</i>			
Resident	18,561.00	19,047.00	2.6%
Nonresident	29,337.00	30,120.00	2.7%
<i>History of Art and Architecture</i>			
Resident	17,346.00	17,346.00	0.0%
Nonresident	27,417.00	27,417.00	0.0%
<b>COLLEGE OF ARTS AND SCIENCES</b>			
<i>MA/Phd</i>			
Resident	15,714.00	16,011.00	1.9%
Nonresident	28,161.00	28,971.00	2.9%
<i>CAS Electrochemistry Masters Internship (EMIP)</i>			
Resident	15,525.00	15,984.00	3.0%
Nonresident	15,525.00	15,984.00	3.0%
<i>CAS Psychology Online</i>			
Resident	14,958.00	15,363.00	2.7%
Nonresident	14,958.00	15,363.00	2.7%
<b>COLLEGE OF EDUCATION</b>			
<i>Base</i>			
Resident	19,107.00	19,485.00	2.0%
Nonresident	27,423.00	27,990.00	2.1%
<i>Supervision</i>			
Resident	20,595.00	21,000.00	2.0%
Nonresident	28,911.00	29,505.00	2.1%
<i>Clinical</i>			
Resident	22,452.00	22,911.00	2.0%
Nonresident	30,660.00	31,308.00	2.1%
<i>Administrative Licensure Programs</i>			
Resident	12,798.00	13,068.00	2.1%
Nonresident	12,798.00	13,068.00	2.1%
<b>SCHOOL OF JOURNALISM AND COMMUNICATION</b>			
<i>MA/PhD</i>			
Resident	16,416.00	16,821.00	2.5%
Nonresident	25,785.00	26,433.00	2.5%
<i>Strategic Communication</i>			
Resident	18,171.00	18,630.00	2.5%
Nonresident	25,056.00	25,677.00	2.5%
<i>Multimedia</i>			
Resident	18,279.00	18,738.00	2.5%
Nonresident	25,164.00	25,785.00	2.5%
<i>Advertising and Brand Management</i>			

## Appendix B: 2022-23 Academic Year Graduate Tuition Increase Proposals (continued)

Resident	16,416.00	16,821.00	2.5%
Nonresident	25,785.00	26,433.00	2.5%
<b>SCHOOL OF LAW</b>			
<i>JD</i>			
Resident	39,618.00	41,598.00	5.0%
Nonresident	49,878.00	52,380.00	5.0%
<i>LLM</i>			
Resident	48,312.00	50,724.00	5.0%
Nonresident	48,312.00	50,724.00	5.0%
<i>CRES</i>			
Resident	23,571.00	24,759.00	5.0%
Nonresident	31,833.00	33,426.00	5.0%
<b>COLLEGE OF BUSINESS</b>			
<i>PhD</i>			
Resident	14,364.00	14,364.00	0.0%
Nonresident	24,057.00	24,057.00	0.0%
<i>MBA</i>			
Resident	30,498.00	31,107.96	2.0%
Nonresident	42,498.00	43,347.96	2.0%
<i>Accounting</i>			
Resident	19,917.00	19,917.00	0.0%
Nonresident	27,627.00	27,627.00	0.0%
<i>Finance</i> <sup>2</sup>			
Resident	24,840.00	24,840.00	0.0%
Nonresident	32,565.00	32,565.00	0.0%
<i>Oregon Executive MBA</i> <sup>3</sup>			
Resident	40,500.00	40,500.00	0.0%
Nonresident	40,500.00	40,500.00	0.0%
<i>Sports Product Management</i> <sup>4</sup>			
Resident	46,800.00	46,800.00	0.0%
Nonresident	46,800.00	46,800.00	0.0%
<i>Sports Product Management (ONLINE)</i>			
Resident	33,426.00	33,426.00	0.0%
Nonresident	33,426.00	33,426.00	0.0%
<b>SCHOOL OF MUSIC AND DANCE</b>			
<i>MA/PhD</i>			
Resident	15,024.00	15,024.00	0.0%
Nonresident	24,807.00	25,416.00	2.5%
<b>KNIGHT CAMPUS</b>			
<i>Industrial Internship Program</i> <sup>5</sup>			
Resident	20,700.00	21,312.00	3.0%
Nonresident	20,700.00	21,312.00	3.0%
<i>Bioengineering</i>			
Resident	15,876.00	16,362.00	3.1%
Nonresident	28,458.00	29,322.00	3.0%
<i>Notes:</i>			
(1) Students in Sports Product Design pay Portland-based fees.			
(2) The cost reported in the table for the Master's in Finance is for three terms of a four term program.			
(3) The cost reported in the table for the Executive MBA is for three terms of a six term program.			
Students in the program pay Portland-based fees.			
(4) The cost reported in the table for the Sports Product Management is for three terms of a five term program and Sports Product Management (ONLINE) is for three terms of a eight term program.			
Students in the program pay Portland-based fees.			
(5) Costs calculated at 12 credit hours. During the academic year, IIP students pay off-campus fees.			
(6) Students will be charged an additional \$20 per credit hour for undergraduate courses taken in the Business School.			
<i>Source:</i> UO Office of Institutional Research.			
For additional information, please contact J.P. Monroe (jpmonroe@uoregon.edu) at 541-346-2085.			

## Appendix C: Members of the 2021–22 Tuition and Fee Advisory Board

Krista Borg	Director of Student Financial Services, Business Affairs Office
Isaiah Boyd	ASUO President; undergraduate student
Jim Brooks	Associate Vice President for Student Services and Enrollment Management and Director, Student Financial Aid and Scholarships
Josh Buetow	Assistant Dean of Finance and Operations, School of Journalism and Communication
Pamanee Chaiwat	Doctoral student, international student
Robin Clement	Master of Accounting Director, University Senate Budget Committee member, Lecturer of Accounting, and Academic Director of the Master of Sports Product Management program, Lundquist College of Business
Angela Davis	Professor of Accounting and Senior Associate Dean of Academic Programs, Lundquist College of Business
Patricia Hersh	Professor of Mathematics
Kimberly Johnson	Vice Provost for Undergraduate Education and Student Success
Stuart Laing	Director of Budget and Resource Planning
Aaron Lewis	ASUO Finance Director; undergraduate student
Kevin Marbury	Vice President for Student Life; co-chair
Jamie Moffitt	Vice President for Finance and Administration & CFO; co-chair
JP Monroe	Director of Institutional Research
Sarah Nutter*	Edward Maletis Dean, Lundquist College of Business
Gabe Paquette	Vice Provost for Academic Affairs
Philip Scher	Divisional Dean for Social Sciences; Director of the Latin American Studies Program; and Professor of Anthropology and Folklore
Shreya Silori	Undergraduate student
Kathie Stanley	Associate Vice President and Chief of Staff, Division of Student Life
Gina Thompson	Cashier Specialist, Business Affairs Office
Gemma Williams**	Undergraduate student

*\* Due to scheduling issues, was replaced by Angela Davis, Senior Associate Dean of Academic Programs, in January 2022.*

*\*\* Withdrawn from TFAB in mid-January due to unforeseen circumstances.*

## Appendix D: Guests at TFAB meetings October 2021–February 2022

Debra Beck	Assistant Vice President for Student Services and Enrollment Management, and Executive Director, University Health Services
Marcilynn Burke	Dean, Dave Frohnmayer Chair in Leadership & Law, School of Law
Sorin Dragoiu	Director of Financial Services, Division of Student Life
Brian Fox	Associate Vice President for Budget, Financial Analysis, and Data Analytics; Executive Director, Monitoring and Assessment Program
Gavin Gamez	Reporter, <i>Daily Emerald</i>
Ellen Grant	Assistant Director of HR and Administration Services, Erb Memorial Union (EMU)
Michael Griffel	Assistant Vice President for Student Services and Enrollment Management, and Director, University Housing
Bill Harbaugh	Professor, Economics
Brent Harrison	Associate Director for Programs, Department of Physical Education and Recreation
Saul Hubbard	Media Relations and Communications Manager
Kay Jarvis	Director of Public Affairs and Issues Management
Anna Johnson	Erb Memorial Union (EMU) Board Chair, student
Jessie Minton	Vice Provost for Information Services and Chief Information Officer
Brady Nittmann	Director of Financial Operations, College of Education
Angie Peatow	Director of Budget and Financial Administration, Student Services and Enrollment Management
Kavi Shereth	Erb Memorial Union (EMU) Budget Chair, student
Donna Sutton Chittenden	Program Manager and Fee Book Administrator, Budget and Resource Planning
Ray Sykes	Associate Dean for Finance and Operations, School of Law
Roger Thompson	Vice President for Student Services and Enrollment Management
Laurie Woodward	Director, Erb Memorial Union (EMU)

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UNIVERSITY OF OREGON

# **UNIVERSITY OF OREGON**

**TUITION AND FEES  
2022-23 ACADEMIC YEAR  
AND  
2023 Summer Session**

UNIVERSITY OF OREGON

2022-23 Fee Increases — Per Term or Semester

Continuing Undergraduates are defined as students who enrolled prior to summer 2020

The 2021 Tuition Cohort is defined as students with an initial enrollment summer 2021, fall 2021, winter 2022, or spring 2022

The 2022 Tuition Cohort is defined as students with an initial enrollment summer 2022, fall 2022, winter 2023, or spring 2023

	2021-22 Academic Year				2022-23 Academic Year				Percentage Change			
	Continuing Undergraduates (per Term)	Incoming Undergraduates — 2021 Tuition Cohort (per Term)	Graduate (per Term)	Law (per Semester)	Continuing Undergraduates (per Term)	Incoming Undergraduates — 2022 Tuition Cohort (per Term)	Graduate (per Term)	Law (per Semester)	Continuing Undergraduates (per Term)	2021 to 2022 Tuition Cohort (per Term)	Graduate (per Term)	Law (per Semester)
Building Fee	45.00	45.00	45.00	67.50	45.00	45.00	45.00	67.50	0.00%	0.00%	0.00%	0.00%
Health Service Fee	236.25	236.25	236.25	354.38	244.75	246.00	244.75	367.13	3.60%	4.13%	3.60%	3.60%
Recreation Center Fee	118.50	133.00	121.25	181.88	122.00	138.50	124.75	187.13	2.95%	4.14%	2.89%	2.89%
Student Union Fee	80.00	81.75	80.00	120.00	82.50	224.50	220.50	330.75	3.13%	174.62%	175.63%	175.63%
Technology Fee	51.50	51.50	51.50	77.25	53.00	53.00	53.00	79.50	2.91%	2.91%	2.91%	2.91%
<b>Total Administrative Mandatory Fees</b>	<b>531.25</b>	<b>547.50</b>	<b>534.00</b>	<b>801.00</b>	<b>547.25</b>	<b>707.00</b>	<b>688.00</b>	<b>1,032.00</b>	<b>3.01%</b>	<b>29.13%</b>	<b>28.84%</b>	<b>28.84%</b>
<b>ASUO Incidental Fee</b>	<b>268.25</b>	<b>268.25</b>	<b>268.25</b>	<b>402.38</b>	<b>272.25</b>	<b>138.25</b>	<b>138.25</b>	<b>207.38</b>	<b>1.49%</b>	<b>-48.46%</b>	<b>-48.46%</b>	<b>-48.46%</b>
<b>Total Fees</b>	<b>799.50</b>	<b>815.75</b>	<b>802.25</b>	<b>1,203.38</b>	<b>819.50</b>	<b>845.25</b>	<b>826.25</b>	<b>1,239.38</b>	<b>2.50%</b>	<b>3.62%</b>	<b>2.99%</b>	<b>2.99%</b>

	Summer 2022				Summer 2023				Percentage Change			
	Continuing Undergraduates (per Term)	Incoming Undergraduates — 2021 Tuition Cohort (per Term)	Graduate (per Term)	Law (per Semester)	Continuing Undergraduates (per Term)	Incoming Undergraduates — 2022 Tuition Cohort (per Term)	Graduate (per Term)	Law (per Semester)	Continuing Undergraduates (per Term)	2021 to 2022 Tuition Cohort (per Term)	Graduate (per Term)	Law (per Semester)
Building Fee	45.00	45.00	45.00	45.00	45.00	45.00	45.00	45.00	0.00%	0.00%	0.00%	0.00%
Health Service Fee	236.25	236.25	236.25	236.25	244.75	246.00	244.75	244.75	3.60%	4.13%	3.60%	3.60%
Recreation Center Fee	118.50	133.00	121.25	121.25	122.00	138.50	124.75	124.75	2.95%	4.14%	2.89%	2.89%
Student Union Fee	80.00	81.75	80.00	80.00	82.50	224.50	220.50	220.50	3.13%	174.62%	175.63%	175.63%
Technology Fee	51.50	51.50	51.50	51.50	53.00	53.00	53.00	53.00	2.91%	2.91%	2.91%	2.91%
<b>Total Administrative Mandatory Fees</b>	<b>531.25</b>	<b>547.50</b>	<b>534.00</b>	<b>534.00</b>	<b>547.25</b>	<b>707.00</b>	<b>688.00</b>	<b>688.00</b>	<b>3.01%</b>	<b>29.13%</b>	<b>28.84%</b>	<b>28.84%</b>
<b>ASUO Incidental Fee</b>	<b>67.06</b>	<b>67.06</b>	<b>67.06</b>	<b>67.06</b>	<b>68.06</b>	<b>34.56</b>	<b>34.56</b>	<b>34.56</b>	<b>1.49%</b>	<b>-48.46%</b>	<b>-48.46%</b>	<b>-48.46%</b>
<b>Total Fees</b>	<b>598.31</b>	<b>614.56</b>	<b>601.06</b>	<b>601.06</b>	<b>615.31</b>	<b>741.56</b>	<b>722.56</b>	<b>722.56</b>	<b>2.84%</b>	<b>20.67%</b>	<b>20.21%</b>	<b>20.21%</b>

Notes:

- (1) During the regular academic year, law students on semesters pay 150% of the academic fee.
- (2) A one-time Matriculation fee is assessed on all new and transfer students — \$490.70 Undergraduate / \$490.70 Graduate and Law.
- (3) Qualified tuition and fees do not include student health service fees for Tax Relief Act reporting.
- (4) Students enrolled in the Portland programs use the Portland State University Student Health Center, and pay the same Health Service Fee as PSU students.
- (5) Students coded as international undergraduates will be assessed a \$200 fee per term during the regular academic year and \$150 during the summer term.
- (6) Students will be charged an additional \$20 per credit hour for undergraduate courses taken in the Business School.

Source: UO Office of Institutional Research.

For additional information, please contact J.P. Monroe (jpmonroe@uoregon.edu) at 541-346-2085.

# UNIVERSITY OF OREGON

## 2022-23 Fee Increases — Per Term or Semester

Continuing Undergraduates are defined as students who enrolled prior to summer 2020

Includes administrative mandatory fees only; pending future ASUO-approved Incidental Fees

2020-21 Academic Year	2021-22 Academic Year	2022-23 Academic Year	2023-24 Academic Year
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### Continuing Undergraduates (per Term)

Building Fee	45.00	45.00	45.00	TBD
Health Service Fee	233.25	236.25	244.75	TBD
Recreation Center Fee	110.56	118.50	122.00	TBD
Student Union Fee	77.00	80.00	82.50	TBD
Technology Fee	50.00	51.50	53.00	TBD
<b>Total Administrative Mandatory Fees</b>	<b>515.81</b>	<b>531.25</b>	<b>547.25</b>	<b>563.67</b>
<b>ASUO Incidental Fee</b>	<b>271.75</b>	<b>268.25</b>	<b>272.25</b>	<b>TBD</b>
<b>Total Fees</b>	<b>787.56</b>	<b>799.50</b>	<b>819.50</b>	<b>TBD</b>

Summer 2021	Summer 2022	Summer 2023	Summer 2024
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### Continuing Undergraduates (per Term)

Building Fee	45.00	45.00	45.00	TBD
Health Service Fee	233.25	236.25	244.75	TBD
Recreation Center Fee	110.56	118.50	122.00	TBD
Student Union Fee	77.00	80.00	82.50	TBD
Technology Fee	50.00	51.50	53.00	TBD
<b>Total Administrative Mandatory Fees</b>	<b>515.81</b>	<b>531.25</b>	<b>547.25</b>	<b>563.67</b>
<b>ASUO Incidental Fee</b>	<b>67.94</b>	<b>67.06</b>	<b>68.06</b>	<b>TBD</b>
<b>Total Fees</b>	<b>583.75</b>	<b>598.31</b>	<b>615.31</b>	<b>TBD</b>

#### Notes:

- (1) During the regular academic year, law students on semesters pay 150% of the academic fee.
- (2) A one-time Matriculation fee is assessed on all new and transfer students — \$490.70 Undergraduate / \$490.70 Graduate and Law.
- (3) Qualified tuition and fees do not include student health service fees for Tax Relief Act reporting.
- (4) Students enrolled in the Portland programs use the Portland State University Student Health Center, and pay the same Health Service Fee as PSU students.
- (5) Students coded as international undergraduates will be assessed a \$200 fee per term during the regular academic year and \$150 during the summer term.
- (6) Students will be charged an additional \$20 per credit hour for undergraduate courses taken in the Business School.

## UNIVERSITY OF OREGON

## 2022-23 Campus-based Fee Structure

	Eugene Campus	Portland Campus	Charleston Campus	Off-campus Site <sup>1</sup>
Building Fee	✓	✓	✓	✓
Incidental Fee	✓	✓ (50% of I-fee)	✓ (50% of I-fee)	✓ (50% of I-fee)
Health Service Fee	✓	✓ (PSU Health Center Fee)	✓	
Recreation Center Fee	✓			
Student Union Fee	✓			
Technology Fee	✓	✓	✓	✓

*Note:*

(1) Includes students taking only online classes.

Source: UO Office of Institutional Research.

For additional information, please contact J.P. Monroe ([jpmorroe@uoregon.edu](mailto:jpmorroe@uoregon.edu)) at 541-346-2085.

UNIVERSITY OF OREGON

Guaranteed Undergraduate Tuition and Fees for Students in the 2020 Tuition Cohort

For undergraduates with an initial enrollment summer 2020, fall 2020, winter 2021, or spring 2021

Final term of the guarantee: Spring 2025

Academic Year 2020 Tuition Undergraduate Cohort								Summer 2020 Tuition Undergraduate Cohort				2020 Tuition Undergraduate Cohort — Clark Honors College				
Credits	Resident		Nonresident		Resident		Nonresident		Resident		Nonresident		Resident		Nonresident	
	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees
1	254.62	1,054.04	820.23	1,619.65	216.43	812.03	533.15	1,128.75	1,242.37	2,041.79	1,807.98	2,607.40				
2	509.24	1,308.66	1,640.45	2,439.87	432.85	1,028.46	1,066.29	1,661.90	1,496.99	2,296.41	2,628.20	3,427.62				
3	763.86	1,563.28	2,460.68	3,260.10	649.28	1,244.89	1,599.44	2,195.05	1,751.61	2,551.03	3,448.43	4,247.85				
4	1,018.48	1,817.90	3,280.90	4,080.32	865.71	1,461.32	2,132.59	2,728.19	2,006.23	2,805.65	4,268.65	5,068.07				
5	1,273.10	2,072.52	4,101.13	4,900.55	1,082.14	1,677.74	2,665.73	3,261.34	2,260.85	3,060.27	5,088.88	5,888.30				
6	1,527.72	2,327.14	4,921.35	5,720.77	1,298.56	1,894.17	3,198.88	3,794.49	2,515.47	3,314.89	5,909.10	6,708.52				
7	1,782.34	2,581.76	5,741.58	6,541.00	1,514.99	2,110.60	3,732.02	4,327.63	2,770.09	3,569.51	6,729.33	7,528.75				
8	2,036.96	2,836.38	6,561.80	7,361.22	1,731.42	2,327.02	4,265.17	4,860.78	3,024.71	3,824.13	7,549.55	8,348.97				
9	2,291.58	3,091.00	7,382.03	8,181.45	1,947.84	2,543.45	4,798.32	5,393.92	3,279.33	4,078.75	8,369.78	9,169.20				
10	2,546.20	3,345.62	8,202.25	9,001.67	2,164.27	2,759.88	5,331.46	5,927.07	3,533.95	4,333.37	9,190.00	9,989.42				
11	2,800.82	3,600.24	9,022.48	9,821.90	2,380.70	2,976.30	5,864.61	6,460.22	3,788.57	4,587.99	10,010.23	10,809.65				
12	3,055.44	3,854.86	9,842.70	10,642.12	2,597.12	3,192.73	6,397.76	6,993.36	4,043.19	4,842.61	10,830.45	11,629.87				
13	3,310.06	4,109.48	10,662.93	11,462.35	2,813.55	3,409.16	6,930.90	7,526.51	4,297.81	5,097.23	11,650.68	12,450.10				
14	3,564.68	4,364.10	11,483.15	12,282.57	3,029.98	3,625.59	7,464.05	8,059.66	4,552.43	5,351.85	12,470.90	13,270.32				
15	3,819.30	4,618.72	12,303.38	13,102.80	3,246.41	3,842.01	7,997.19	8,592.80	4,807.05	5,606.47	13,291.13	14,090.55				
16	4,073.92	4,873.34	13,123.60	13,923.02	3,462.83	4,058.44	8,530.34	9,125.95	5,061.67	5,861.09	14,111.35	14,910.77				
17	4,328.54	5,127.96	13,943.83	14,743.25	3,679.26	4,274.87	9,063.49	9,659.09	5,316.29	6,115.71	14,931.58	15,731.00				
18	4,583.16	5,382.58	14,764.05	15,563.47	3,895.69	4,491.29	9,596.63	10,192.24	5,570.91	6,370.33	15,751.80	16,551.22				
<i>Each Add'l Credit Hour</i>		254.62	820.23		216.43		533.15		254.62		820.23					

Notes:

- (1) During the regular academic year, law students on semesters pay 150% of the academic fee.
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- (5) Students coded as international undergraduates will be assessed a \$200 fee per term during the regular academic year and \$150 during the summer term.
- (6) Students will be charged an additional \$20 per credit hour for undergraduate courses taken in the Business School.

Source: UO Office of Institutional Research.

For additional information, please contact J.P. Monroe (jpmönroe@uoregon.edu) at 541-346-2085.

UNIVERSITY OF OREGON

Guaranteed Undergraduate Tuition and Fees for Students in the 2021 Tuition Cohort

For undergraduates with an initial enrollment summer 2021, fall 2021, winter 2022, or spring 2022

Final term of the guarantee: Spring 2026

Academic Year 2021 Tuition Undergraduate Cohort								Summer 2021 Tuition Undergraduate Cohort								2021 Tuition Undergraduate Cohort — Clark Honors College								
Credits	Resident				Nonresident				Resident				Nonresident				Resident				Nonresident			
	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees
1	266.08	1,081.83	844.83	1,660.58	226.17	840.73	549.14	1,163.70	1,268.65	2,084.40	1,847.40	2,663.15	1,534.73	2,350.48	2,692.23	3,507.98	1,800.81	2,616.56	3,537.06	4,352.81	2,066.89	2,882.64	4,381.89	5,197.64
2	532.16	1,347.91	1,689.66	2,505.41	452.34	1,066.90	1,098.28	1,712.84	1,534.73	2,350.48	2,692.23	3,507.98	1,800.81	2,616.56	3,537.06	4,352.81	2,332.97	3,148.72	5,226.72	6,042.47	2,599.05	3,414.80	6,071.55	6,887.30
3	798.24	1,613.99	2,534.49	3,350.24	678.50	1,293.07	1,647.42	2,261.98	1,862.56	2,680.88	6,916.38	7,732.13	2,865.13	3,680.88	7,761.21	8,576.96	3,131.21	3,946.96	7,761.21	8,576.96	3,397.29	4,213.04	8,606.04	9,421.79
4	1,064.32	1,880.07	3,379.32	4,195.07	904.67	1,519.23	2,196.56	2,811.12	2,066.89	2,882.64	4,381.89	5,197.64	2,332.97	3,148.72	5,226.72	6,042.47	2,599.05	3,414.80	6,071.55	6,887.30	2,865.13	3,680.88	6,916.38	7,732.13
5	1,330.40	2,146.15	4,224.15	5,039.90	1,130.84	1,745.40	2,745.70	3,360.26	2,332.97	3,148.72	5,226.72	6,042.47	2,599.05	3,414.80	6,071.55	6,887.30	2,865.13	3,680.88	6,916.38	7,732.13	3,131.21	3,946.96	7,761.21	8,576.96
6	1,596.48	2,412.23	5,068.98	5,884.73	1,357.01	1,971.57	3,294.84	3,909.40	2,599.05	3,414.80	6,071.55	6,887.30	2,865.13	3,680.88	6,916.38	7,732.13	3,397.29	4,213.04	8,606.04	9,421.79	3,663.37	4,479.12	9,450.87	10,266.62
7	1,862.56	2,678.31	5,913.81	6,729.56	1,583.18	2,197.74	3,843.98	4,458.54	3,131.21	3,946.96	7,761.21	8,576.96	3,929.45	4,745.20	10,295.70	11,111.45	4,461.61	5,277.36	11,985.36	12,801.11	4,727.69	5,543.44	12,830.19	13,645.94
8	2,128.64	2,944.39	6,758.64	7,574.39	1,809.34	2,423.91	4,393.12	5,007.68	4,993.77	5,809.52	13,675.02	14,490.77	5,259.85	6,075.60	14,519.85	15,335.60	5,525.93	6,341.68	15,364.68	16,180.43	5,792.01	6,607.76	16,209.51	17,025.26
9	2,394.72	3,210.47	7,603.47	8,419.22	2,035.51	2,650.07	4,942.26	5,556.82	4,461.61	5,277.36	11,985.36	12,801.11	5,991.20	6,806.95	12,672.45	13,488.20	3,597.29	4,213.04	8,606.04	9,421.79	5,792.01	6,607.76	16,209.51	17,025.26
10	2,660.80	3,476.55	8,448.30	9,264.05	2,261.68	2,876.24	5,491.40	6,105.96	4,461.61	5,277.36	11,985.36	12,801.11	6,239.44	7,053.21	10,137.96	10,953.71	3,397.29	4,213.04	8,606.04	9,421.79	6,663.37	7,479.12	9,450.87	10,266.62
11	2,926.88	3,742.63	9,293.13	10,108.88	2,487.85	3,102.41	6,040.53	6,655.10	4,461.61	5,277.36	11,985.36	12,801.11	6,539.44	7,353.21	10,137.96	10,953.71	3,663.37	4,479.12	9,450.87	10,266.62	6,865.13	7,680.88	9,916.38	10,732.13
12	3,192.96	4,008.71	10,137.96	10,953.71	2,714.02	3,328.58	6,589.67	7,204.24	4,461.61	5,277.36	11,985.36	12,801.11	6,865.13	7,680.88	9,916.38	10,732.13	3,663.37	4,479.12	9,450.87	10,266.62	7,039.44	7,845.21	10,295.70	11,111.45
13	3,459.04	4,274.79	10,982.79	11,798.54	2,940.18	3,554.75	7,138.81	7,753.38	4,461.61	5,277.36	11,985.36	12,801.11	7,275.21	8,085.44	11,798.54	12,618.37	3,663.37	4,479.12	9,450.87	10,266.62	7,472.69	8,283.44	12,830.19	13,645.94
14	3,725.12	4,540.87	11,827.62	12,643.37	3,166.35	3,780.91	7,687.95	8,302.52	4,461.61	5,277.36	11,985.36	12,801.11	7,691.20	8,506.95	12,672.45	13,488.20	3,993.77	5,809.52	13,675.02	14,490.77	7,929.45	8,745.20	10,295.70	11,111.45
15	3,991.20	4,806.95	12,672.45	13,488.20	3,392.52	4,007.08	8,237.09	8,851.66	4,993.77	5,809.52	13,675.02	14,490.77	8,237.09	9,007.08	13,517.28	14,333.03	5,259.85	6,075.60	14,519.85	15,335.60	8,525.93	9,335.37	9,949.93	10,499.07
16	4,257.28	5,073.03	13,517.28	14,333.03	3,618.69	4,233.25	8,786.23	9,400.79	5,259.85	6,075.60	14,519.85	15,335.60	9,335.37	9,949.93	13,333.03	14,177.86	5,525.93	6,341.68	15,364.68	16,180.43	9,792.01	10,499.07	11,140.53	11,956.28
17	4,523.36	5,339.11	14,362.11	15,177.86	3,844.86	4,459.42	9,335.37	9,949.93	5,525.93	6,341.68	15,364.68	16,180.43	10,499.07	11,140.53	15,177.86	16,022.69	5,792.01	6,607.76	16,209.51	17,025.26	10,792.01	11,499.07	12,949.93	13,645.94
18	4,789.44	5,605.19	15,206.94	16,022.69	4,071.02	4,685.59	9,884.51	10,499.07	5,792.01	6,607.76	16,209.51	17,025.26	11,499.07	12,949.93	16,022.69	16,789.44	6,072.01	6,789.44	17,025.26	17,889.44	6,341.68	7,053.21	18,499.07	19,206.94
<i>Each Add'l Credit Hour</i>	<i>266.08</i>	<i>844.83</i>			<i>226.17</i>		<i>549.14</i>				<i>266.08</i>			<i>844.83</i>										

Notes:

- (1) During the regular academic year, law students on semesters pay 150% of the academic fee.
- (2) A one-time Matriculation fee is assessed on all new and transfer students — \$490.70 Undergraduate / \$490.70 Graduate and Law.
- (3) Qualified tuition and fees do not include student health service fees for Tax Relief Act reporting.
- (4) Students enrolled in the Portland programs use the Portland State University Student Health Center, and pay the same Health Service Fee as PSU students.
- (5) Students coded as international undergraduates will be assessed a \$200 fee per term during the regular academic year and \$150 during the summer term.
- (6) Students will be charged an additional \$20 per credit hour for undergraduate courses taken in the Business School.

Source: UO Office of Institutional Research.

For additional information, please contact J.P. Monroe (jpmonroe@uoregon.edu) at 541-346-2085.

UNIVERSITY OF OREGON

Guaranteed Undergraduate Tuition and Fees for Students in the 2022 Tuition Cohort

For undergraduates with an initial enrollment summer 2022, fall 2022, winter 2023, or spring 2023

Final term of the guarantee: Spring 2027

Academic Year 2022 Tuition Undergraduate Cohort								Summer 2022 Tuition Undergraduate Cohort				2022 Tuition Undergraduate Cohort — Clark Honors College				
Credits	Resident		Nonresident		Resident		Nonresident		Resident		Nonresident		Resident		Nonresident	
	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees
1	278.05	1,123.30	870.17	1,715.42	236.34	977.91	565.61	1,307.17	1,285.63	2,130.88	1,877.75	2,723.00				
2	556.10	1,401.35	1,740.34	2,585.59	472.69	1,214.25	1,131.22	1,872.78	1,563.68	2,408.93	2,747.92	3,593.17				
3	834.15	1,679.40	2,610.51	3,455.76	709.03	1,450.59	1,696.83	2,438.39	1,841.73	2,686.98	3,618.09	4,463.34				
4	1,112.20	1,957.45	3,480.68	4,325.93	945.37	1,686.93	2,262.44	3,004.00	2,119.78	2,965.03	4,488.26	5,333.51				
5	1,390.25	2,235.50	4,350.85	5,196.10	1,181.71	1,923.28	2,828.05	3,569.62	2,397.83	3,243.08	5,358.43	6,203.68				
6	1,668.30	2,513.55	5,221.02	6,066.27	1,418.06	2,159.62	3,393.66	4,135.23	2,675.88	3,521.13	6,228.60	7,073.85				
7	1,946.35	2,791.60	6,091.19	6,936.44	1,654.40	2,395.96	3,959.27	4,700.84	2,953.93	3,799.18	7,098.77	7,944.02				
8	2,224.40	3,069.65	6,961.36	7,806.61	1,890.74	2,632.30	4,524.88	5,266.45	3,231.98	4,077.23	7,968.94	8,814.19				
9	2,502.45	3,347.70	7,831.53	8,676.78	2,127.08	2,868.65	5,090.49	5,832.06	3,510.03	4,355.28	8,839.11	9,684.36				
10	2,780.50	3,625.75	8,701.70	9,546.95	2,363.43	3,104.99	5,656.11	6,397.67	3,788.08	4,633.33	9,709.28	10,554.53				
11	3,058.55	3,903.80	9,571.87	10,417.12	2,599.77	3,341.33	6,221.72	6,963.28	4,066.13	4,911.38	10,579.45	11,424.70				
12	3,336.60	4,181.85	10,442.04	11,287.29	2,836.11	3,577.67	6,787.33	7,528.89	4,344.18	5,189.43	11,449.62	12,294.87				
13	3,614.65	4,459.90	11,312.21	12,157.46	3,072.45	3,814.02	7,352.94	8,094.50	4,622.23	5,467.48	12,319.79	13,165.04				
14	3,892.70	4,737.95	12,182.38	13,027.63	3,308.80	4,050.36	7,918.55	8,660.11	4,900.28	5,745.53	13,189.96	14,035.21				
15	4,170.75	5,016.00	13,052.55	13,897.80	3,545.14	4,286.70	8,484.16	9,225.72	5,178.33	6,023.58	14,060.13	14,905.38				
16	4,448.80	5,294.05	13,922.72	14,767.97	3,781.48	4,523.04	9,049.77	9,791.33	5,456.38	6,301.63	14,930.30	15,775.55				
17	4,726.85	5,572.10	14,792.89	15,638.14	4,017.82	4,759.39	9,615.38	10,356.94	5,734.43	6,579.68	15,800.47	16,645.72				
18	5,004.90	5,850.15	15,663.06	16,508.31	4,254.17	4,995.73	10,180.99	10,922.55	6,012.48	6,857.73	16,670.64	17,515.89				
<i>Each Add'l Credit Hour</i>	278.05		870.17		236.34		565.61			278.05		870.17				

Notes:

- (1) During the regular academic year, law students on semesters pay 150% of the academic fee.
- (2) A one-time Matriculation fee is assessed on all new and transfer students — \$490.70 Undergraduate / \$490.70 Graduate and Law.
- (3) Qualified tuition and fees do not include student health service fees for Tax Relief Act reporting.
- (4) Students enrolled in the Portland programs use the Portland State University Student Health Center, and pay the same Health Service Fee as PSU students.
- (5) Students coded as international undergraduates will be assessed a \$200 fee per term during the regular academic year and \$150 during the summer term.
- (6) Students will be charged an additional \$20 per credit hour for undergraduate courses taken in the Business School.

Source: UO Office of Institutional Research.

For additional information, please contact J.P. Monroe (jpmonroe@uoregon.edu) at 541-346-2085.

UNIVERSITY OF OREGON

Academic Year 2020-21 Undergraduate Tuition and Fees for Continuing Students

For undergraduates enrolled prior to summer 2020

Academic Year Continuing Undergraduate				Summer 2021 Continuing Undergraduate				Continuing Undergraduate — Clark Honors College				
Resident		Nonresident		Resident		Nonresident		Resident		Nonresident		
Credits	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees
1	238.96	1,026.52	785.89	1,573.45	203.12	786.86	510.83	1,094.58	1,165.96	1,953.52	1,712.89	2,500.45
2	477.92	1,265.48	1,571.78	2,359.34	406.23	989.98	1,021.66	1,605.40	1,404.92	2,192.48	2,498.78	3,286.34
3	716.88	1,504.44	2,357.67	3,145.23	609.35	1,193.10	1,532.49	2,116.23	1,643.88	2,431.44	3,284.67	4,072.23
4	955.84	1,743.40	3,143.56	3,931.12	812.46	1,396.21	2,043.31	2,627.06	1,882.84	2,670.40	4,070.56	4,858.12
5	1,194.80	1,982.36	3,929.45	4,717.01	1,015.58	1,599.33	2,554.14	3,137.89	2,121.80	2,909.36	4,856.45	5,644.01
6	1,433.76	2,221.32	4,715.34	5,502.90	1,218.70	1,802.44	3,064.97	3,648.72	2,360.76	3,148.32	5,642.34	6,429.90
7	1,672.72	2,460.28	5,501.23	6,288.79	1,421.81	2,005.56	3,575.80	4,159.55	2,599.72	3,387.28	6,428.23	7,215.79
8	1,911.68	2,699.24	6,287.12	7,074.68	1,624.93	2,208.68	4,086.63	4,670.38	2,838.68	3,626.24	7,214.12	8,001.68
9	2,150.64	2,938.20	7,073.01	7,860.57	1,828.04	2,411.79	4,597.46	5,181.20	3,077.64	3,865.20	8,000.01	8,787.57
10	2,389.60	3,177.16	7,858.90	8,646.46	2,031.16	2,614.91	5,108.29	5,692.03	3,316.60	4,104.16	8,785.90	9,573.46
11	2,628.56	3,416.12	8,644.79	9,432.35	2,234.28	2,818.02	5,619.11	6,202.86	3,555.56	4,343.12	9,571.79	10,359.35
12	2,867.52	3,655.08	9,430.68	10,218.24	2,437.39	3,021.14	6,129.94	6,713.69	3,794.52	4,582.08	10,357.68	11,145.24
13	3,106.48	3,894.04	10,216.57	11,004.13	2,640.51	3,224.26	6,640.77	7,224.52	4,033.48	4,821.04	11,143.57	11,931.13
14	3,345.44	4,133.00	11,002.46	11,790.02	2,843.62	3,427.37	7,151.60	7,735.35	4,272.44	5,060.00	11,929.46	12,717.02
15	3,584.40	4,371.96	11,788.35	12,575.91	3,046.74	3,630.49	7,662.43	8,246.18	4,511.40	5,298.96	12,715.35	13,502.91
16	3,823.36	4,610.92	12,574.24	13,361.80	3,249.86	3,833.60	8,173.26	8,757.00	4,750.36	5,537.92	13,501.24	14,288.80
17	4,062.32	4,849.88	13,360.13	14,147.69	3,452.97	4,036.72	8,684.08	9,267.83	4,989.32	5,776.88	14,287.13	15,074.69
18	4,301.28	5,088.84	14,146.02	14,933.58	3,656.09	4,239.84	9,194.91	9,778.66	5,228.28	6,015.84	15,073.02	15,860.58
<i>Each Add'l Credit Hour</i>		238.96	785.89		203.12		510.83		238.96	785.89		

Notes:

- (1) During the regular academic year, law students on semesters pay 150% of the academic fee.
- (2) A one-time Matriculation fee is assessed on all new and transfer students — \$490.70 Undergraduate / \$490.70 Graduate and Law.
- (3) Qualified tuition and fees do not include student health service fees for Tax Relief Act reporting.
- (4) Students enrolled in the Portland programs use the Portland State University Student Health Center, and pay the same Health Service Fee as PSU students.
- (5) Students coded as international undergraduates will be assessed a \$200 fee per term during the regular academic year and \$150 during the summer term.
- (6) Students will be charged an additional \$20 per credit hour for undergraduate courses taken in the Business School.

Source: UO Office of Institutional Research.

For additional information, please contact J.P. Monroe (jpmorroe@uoregon.edu) at 541-346-2085.

UNIVERSITY OF OREGON

Academic Year 2021-22 Undergraduate Tuition and Fees for Continuing Students

For undergraduates enrolled prior to summer 2020

Administrative mandatory fees preapproved for a 3% increase over the prior year; pending future ASUO-approved Incidental Fees

Academic Year Continuing Undergraduate				Summer 2022 Continuing Undergraduate				Continuing Undergraduate — Clark Honors College				
Credits	Resident		Nonresident		Resident		Nonresident		Resident		Nonresident	
	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees
1	246.13	1,045.63	809.47	1,608.97	209.21	807.52	526.15	1,124.47	1,200.94	2,000.44	1,764.28	2,563.78
2	492.26	1,291.76	1,618.93	2,418.43	418.42	1,016.73	1,052.31	1,650.62	1,447.07	2,246.57	2,573.74	3,373.24
3	738.39	1,537.89	2,428.40	3,227.90	627.63	1,225.94	1,578.46	2,176.77	1,693.20	2,492.70	3,383.21	4,182.71
4	984.52	1,784.02	3,237.87	4,037.37	836.84	1,435.15	2,104.61	2,702.93	1,939.33	2,738.83	4,192.68	4,992.18
5	1,230.64	2,030.14	4,047.33	4,846.83	1,046.05	1,644.36	2,630.77	3,229.08	2,185.45	2,984.95	5,002.14	5,801.64
6	1,476.77	2,276.27	4,856.80	5,656.30	1,255.26	1,853.57	3,156.92	3,755.23	2,431.58	3,231.08	5,811.61	6,611.11
7	1,722.90	2,522.40	5,666.27	6,465.77	1,464.47	2,062.78	3,683.07	4,281.39	2,677.71	3,477.21	6,621.08	7,420.58
8	1,969.03	2,768.53	6,475.73	7,275.23	1,673.68	2,271.99	4,209.23	4,807.54	2,923.84	3,723.34	7,430.54	8,230.04
9	2,215.16	3,014.66	7,285.20	8,084.70	1,882.89	2,481.20	4,735.38	5,333.69	3,169.97	3,969.47	8,240.01	9,039.51
10	2,461.29	3,260.79	8,094.67	8,894.17	2,092.09	2,690.41	5,261.53	5,859.85	3,416.10	4,215.60	9,049.48	9,848.98
11	2,707.42	3,506.92	8,904.13	9,703.63	2,301.30	2,899.62	5,787.69	6,386.00	3,662.23	4,461.73	9,858.94	10,658.44
12	2,953.55	3,753.05	9,713.60	10,513.10	2,510.51	3,108.83	6,313.84	6,912.15	3,908.36	4,707.86	10,668.41	11,467.91
13	3,199.67	3,999.17	10,523.07	11,322.57	2,719.72	3,318.04	6,839.99	7,438.31	4,154.48	4,953.98	11,477.88	12,277.38
14	3,445.80	4,245.30	11,332.53	12,132.03	2,928.93	3,527.25	7,366.15	7,964.46	4,400.61	5,200.11	12,287.34	13,086.84
15	3,691.93	4,491.43	12,142.00	12,941.50	3,138.14	3,736.45	7,892.30	8,490.61	4,646.74	5,446.24	13,096.81	13,896.31
16	3,938.06	4,737.56	12,951.47	13,750.97	3,347.35	3,945.66	8,418.45	9,016.77	4,892.87	5,692.37	13,906.28	14,705.78
17	4,184.19	4,983.69	13,760.93	14,560.43	3,556.56	4,154.87	8,944.61	9,542.92	5,139.00	5,938.50	14,715.74	15,515.24
18	4,430.32	5,229.82	14,570.40	15,369.90	3,765.77	4,364.08	9,470.76	10,069.07	5,385.13	6,184.63	15,525.21	16,324.71
<i>Each Add'l Credit Hour</i>		246.13	809.47		209.21		526.15		246.13		809.47	

Notes:

- (1) During the regular academic year, law students on semesters pay 150% of the academic fee.
- (2) A one-time Matriculation fee is assessed on all new and transfer students — \$490.70 Undergraduate / \$490.70 Graduate and Law.
- (3) Qualified tuition and fees do not include student health service fees for Tax Relief Act reporting.
- (4) Students enrolled in the Portland programs use the Portland State University Student Health Center, and pay the same Health Service Fee as PSU students.
- (5) Students coded as international undergraduates will be assessed a \$200 fee per term during the regular academic year and \$150 during the summer term.
- (6) Students will be charged an additional \$20 per credit hour for undergraduate courses taken in the Business School.

Source: UO Office of Institutional Research.

For additional information, please contact J.P. Monroe (jpmonroe@uoregon.edu) at 541-346-2085.

UNIVERSITY OF OREGON

Academic Year 2022-23 Undergraduate Tuition and Fees for Continuing Students

For undergraduates enrolled prior to summer 2020

Administrative mandatory fees preapproved for a 3% increase over the prior year; pending future ASUO-approved Incidental Fees

Academic Year Continuing Undergraduate				Summer 2023 Continuing Undergraduate				Continuing Undergraduate — Clark Honors College			
Resident		Nonresident		Resident		Nonresident		Resident		Nonresident	
Credits	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition
1	253.51	1,073.01	833.75	1,653.25	215.49	830.80	541.94	1,157.25	1,236.96	2,056.46	1,817.20
2	507.03	1,326.53	1,667.50	2,487.00	430.97	1,046.28	1,083.88	1,699.19	1,490.48	2,309.98	2,650.95
3	760.54	1,580.04	2,501.25	3,320.75	646.46	1,261.77	1,625.81	2,241.13	1,743.99	2,563.49	3,484.70
4	1,014.05	1,833.55	3,335.00	4,154.50	861.94	1,477.26	2,167.75	2,783.06	1,997.50	2,817.00	4,318.45
5	1,267.56	2,087.06	4,168.75	4,988.25	1,077.43	1,692.74	2,709.69	3,325.00	2,251.01	3,070.51	5,152.20
6	1,521.08	2,340.58	5,002.50	5,822.00	1,292.91	1,908.23	3,251.63	3,866.94	2,504.53	3,324.03	5,985.95
7	1,774.59	2,594.09	5,836.25	6,655.75	1,508.40	2,123.71	3,793.57	4,408.88	2,758.04	3,577.54	6,819.70
8	2,028.10	2,847.60	6,670.01	7,489.51	1,723.89	2,339.20	4,335.50	4,950.82	3,011.55	3,831.05	7,653.46
9	2,281.61	3,101.11	7,503.76	8,323.26	1,939.37	2,554.68	4,877.44	5,492.75	3,265.06	4,084.56	8,487.21
10	2,535.13	3,354.63	8,337.51	9,157.01	2,154.86	2,770.17	5,419.38	6,034.69	3,518.58	4,338.08	9,320.96
11	2,788.64	3,608.14	9,171.26	9,990.76	2,370.34	2,985.66	5,961.32	6,576.63	3,772.09	4,591.59	10,154.71
12	3,042.15	3,861.65	10,005.01	10,824.51	2,585.83	3,201.14	6,503.26	7,118.57	4,025.60	4,845.10	10,988.46
13	3,295.66	4,115.16	10,838.76	11,658.26	2,801.31	3,416.63	7,045.19	7,660.51	4,279.11	5,098.61	11,822.21
14	3,549.18	4,368.68	11,672.51	12,492.01	3,016.80	3,632.11	7,587.13	8,202.44	4,532.63	5,352.13	12,655.96
15	3,802.69	4,622.19	12,506.26	13,325.76	3,232.29	3,847.60	8,129.07	8,744.38	4,786.14	5,605.64	13,489.71
16	4,056.20	4,875.70	13,340.01	14,159.51	3,447.77	4,063.08	8,671.01	9,286.32	5,039.65	5,859.15	14,323.46
17	4,309.72	5,129.22	14,173.76	14,993.26	3,663.26	4,278.57	9,212.95	9,828.26	5,293.17	6,112.67	15,157.21
18	4,563.23	5,382.73	15,007.51	15,827.01	3,878.74	4,494.06	9,754.88	10,370.20	5,546.68	6,366.18	15,990.96
<i>Each Add'l Credit Hour</i>		253.51	833.75	215.49	541.94			253.51	833.75		

Notes:

- (1) During the regular academic year, law students on semesters pay 150% of the academic fee.
- (2) A one-time Matriculation fee is assessed on all new and transfer students — \$490.70 Undergraduate / \$490.70 Graduate and Law.
- (3) Qualified tuition and fees do not include student health service fees for Tax Relief Act reporting.
- (4) Students enrolled in the Portland programs use the Portland State University Student Health Center, and pay the same Health Service Fee as PSU students.
- (5) Students coded as international undergraduates will be assessed a \$200 fee per term during the regular academic year and \$150 during the summer term.
- (6) Students will be charged an additional \$20 per credit hour for undergraduate courses taken in the Business School.

Source: UO Office of Institutional Research.

For additional information, please contact J.P. Monroe (jpmönroe@uoregon.edu) at 541-346-2085.

# UNIVERSITY OF OREGON

## Academic Year 2023-24 Undergraduate Tuition and Fees for Continuing Students

For undergraduates enrolled prior to summer 2020

Administrative mandatory fees preapproved for a 3% increase over the prior year; pending future ASUO-approved Incidental Fees

Academic Year Continuing Undergraduate					Continuing Undergraduate — Clark Honors College				
Credits	Resident		Nonresident		Resident		Nonresident		Tuition and Fees
	Tuition	Fees	Tuition	Fees	Tuition	Fees	Tuition	Fees	
1	261.12	TBD	858.76	TBD	1,274.07	TBD	1,871.71	TBD	
2	522.24	TBD	1,717.53	TBD	1,535.19	TBD	2,730.48	TBD	
3	783.35	TBD	2,576.29	TBD	1,796.30	TBD	3,589.24	TBD	
4	1,044.47	TBD	3,435.05	TBD	2,057.42	TBD	4,448.00	TBD	
5	1,305.59	TBD	4,293.82	TBD	2,318.54	TBD	5,306.77	TBD	
6	1,566.71	TBD	5,152.58	TBD	2,579.66	TBD	6,165.53	TBD	
7	1,827.83	TBD	6,011.34	TBD	2,840.78	TBD	7,024.29	TBD	
8	2,088.94	TBD	6,870.11	TBD	3,101.89	TBD	7,883.06	TBD	
9	2,350.06	TBD	7,728.87	TBD	3,363.01	TBD	8,741.82	TBD	
10	2,611.18	TBD	8,587.63	TBD	3,624.13	TBD	9,600.58	TBD	
11	2,872.30	TBD	9,446.40	TBD	3,885.25	TBD	10,459.35	TBD	
12	3,133.42	TBD	10,305.16	TBD	4,146.37	TBD	11,318.11	TBD	
13	3,394.53	TBD	11,163.92	TBD	4,407.48	TBD	12,176.87	TBD	
14	3,655.65	TBD	12,022.69	TBD	4,668.60	TBD	13,035.64	TBD	
15	3,916.77	TBD	12,881.45	TBD	4,929.72	TBD	13,894.40	TBD	
16	4,177.89	TBD	13,740.21	TBD	5,190.84	TBD	14,753.16	TBD	
17	4,439.01	TBD	14,598.97	TBD	5,451.96	TBD	15,611.92	TBD	
18	4,700.12	TBD	15,457.74	TBD	5,713.07	TBD	16,470.69	TBD	
<i>Each Add'l Credit Hour</i>	261.12		858.76		261.12		858.76		

### Notes:

- (1) During the regular academic year, law students on semesters pay 150% of the academic fee.
- (2) A one-time Matriculation fee is assessed on all new and transfer students — \$490.70 Undergraduate / \$490.70 Graduate and Law.
- (3) Qualified tuition and fees do not include student health service fees for Tax Relief Act reporting.
- (4) Students enrolled in the Portland programs use the Portland State University Student Health Center, and pay the same Health Service Fee as PSU students.
- (5) Students coded as international undergraduates will be assessed a \$200 fee per term during the regular academic year and \$150 during the summer term.
- (6) Students will be charged an additional \$20 per credit hour for undergraduate courses taken in the Business School.

Source: UO Office of Institutional Research.

For additional information, please contact J.P. Monroe (jpmonroe@uoregon.edu ) at 541-346-2085.

UNIVERSITY OF OREGON

Summer 2022 Graduate Tuition Rates

COLLEGE OF BUSINESS

KNIGHT CAMPUS

Summer Graduate				Summer Graduate					
Resident		Nonresident		Resident		Nonresident			
Credits	Masters in Finance	Sports Product Mngt (ONLINE)	Masters in Finance	Sports Product Mngt (ONLINE)	Credits	Industrial Internship Program	Bioengineering	Industrial Internship Program	Bioengineering
1	920.00	11,142.00	1,206.00	11,142.00	1	592.00	606.00	592.00	1,086.00
2	1,840.00	11,142.00	2,412.00	11,142.00	2	1,184.00	1,212.00	1,184.00	2,172.00
3	2,760.00	11,142.00	3,618.00	11,142.00	3	1,776.00	1,818.00	1,776.00	3,258.00
4	3,680.00	11,142.00	4,824.00	11,142.00	4	2,368.00	2,424.00	2,368.00	4,344.00
5	4,600.00	11,142.00	6,030.00	11,142.00	5	2,960.00	3,030.00	2,960.00	5,430.00
6	5,520.00	11,142.00	7,236.00	11,142.00	6	3,552.00	3,636.00	3,552.00	6,516.00
7	6,440.00	11,142.00	8,442.00	11,142.00	7	4,144.00	4,242.00	4,144.00	7,602.00
8	7,360.00	11,142.00	9,648.00	11,142.00	8	4,736.00	4,848.00	4,736.00	8,688.00
9	8,280.00	11,142.00	10,855.00	11,142.00	9	5,328.00	5,454.00	5,328.00	9,774.00
10	8,280.00	11,142.00	10,855.00	11,142.00	10	5,920.00	5,454.00	5,920.00	9,774.00
11	8,280.00	11,142.00	10,855.00	11,142.00	11	6,512.00	5,454.00	6,512.00	9,774.00
12	8,280.00	11,142.00	10,855.00	11,142.00	12	7,104.00	5,454.00	7,104.00	9,774.00
13	8,280.00	11,142.00	10,855.00	11,142.00	13	7,696.00	5,454.00	7,696.00	9,774.00
14	8,280.00	11,142.00	10,855.00	11,142.00	14	8,288.00	5,454.00	8,288.00	9,774.00
15	8,280.00	11,142.00	10,855.00	11,142.00	15	8,880.00	5,454.00	8,880.00	9,774.00
16	8,280.00	11,142.00	10,855.00	11,142.00	16	9,472.00	5,454.00	9,472.00	9,774.00
17	8,280.00	11,142.00	10,855.00	11,142.00	17	10,064.00	6,060.00	10,064.00	10,860.00
18	8,280.00	11,142.00	10,855.00	11,142.00	18	10,656.00	6,666.00	10,656.00	11,946.00
<i>Each Add'l Credit Hour</i>	920.00	-na-	1,206.00	-na-	<i>Each Add'l Credit Hour</i>	592.00	606.00	592.00	1,086.00

Please see Graduate Tuition Notes.

UNIVERSITY OF OREGON

Academic Year 2022-23 Graduate Tuition Rates

COLLEGE OF DESIGN

Academic Year Graduate																	Nonresident									
Resident																	Nonresident									
Credits	Architecture and Interior		Landscape		Historic		Sports Product		Planning, Public Policy, and Management		History of Art and		Architecture and Interior		Landscape		Historic		Sports Product		Planning, Public Policy, and Management		History of Art and			
	Architecture	Architecture	Architecture	Architecture	Preservation	Art	Design	Management	Architecture	Architecture	Architecture	Architecture	Architecture	Architecture	Architecture	Preservation	Art	Design	Management	Architecture	Architecture	Architecture	Architecture	Architecture	Architecture	
1	2,757.00	1,224.00	841.00	1,153.00	11,771.00	997.00	918.00	2,920.00	1,587.00	1,254.00	1,213.00	11,771.00	1,424.00	1,307.00	2,704.00	1,224.00	1,224.00	1,224.00	1,224.00	1,224.00	1,224.00	1,224.00	1,224.00	1,224.00	1,224.00	
2	3,406.00	1,873.00	1,490.00	1,734.00	11,771.00	1,666.00	1,526.00	4,007.00	2,674.00	2,341.00	1,854.00	11,771.00	2,501.00	2,286.00	3,406.00	1,873.00	1,873.00	1,873.00	1,873.00	1,873.00	1,873.00	1,873.00	1,873.00	1,873.00	1,873.00	
3	4,055.00	2,522.00	2,139.00	2,315.00	11,771.00	2,335.00	2,134.00	5,094.00	3,761.00	3,428.00	2,495.00	11,771.00	3,578.00	3,265.00	4,055.00	2,522.00	2,522.00	2,522.00	2,522.00	2,522.00	2,522.00	2,522.00	2,522.00	2,522.00	2,522.00	
4	4,704.00	3,171.00	2,788.00	2,896.00	11,771.00	3,004.00	2,742.00	6,181.00	4,848.00	4,515.00	3,136.00	11,771.00	4,655.00	4,244.00	4,704.00	3,171.00	3,171.00	3,171.00	3,171.00	3,171.00	3,171.00	3,171.00	3,171.00	3,171.00	3,171.00	
5	5,353.00	3,820.00	3,437.00	3,477.00	11,771.00	3,673.00	3,350.00	7,268.00	5,935.00	5,602.00	3,777.00	11,771.00	5,732.00	5,223.00	5,353.00	3,820.00	3,820.00	3,820.00	3,820.00	3,820.00	3,820.00	3,820.00	3,820.00	3,820.00	3,820.00	
6	6,002.00	4,469.00	4,086.00	4,058.00	11,771.00	4,342.00	3,958.00	8,355.00	7,022.00	6,689.00	4,418.00	11,771.00	6,809.00	6,202.00	6,002.00	4,469.00	4,469.00	4,469.00	4,469.00	4,469.00	4,469.00	4,469.00	4,469.00	4,469.00	4,469.00	
7	6,651.00	5,118.00	4,735.00	4,639.00	11,771.00	5,011.00	4,566.00	9,442.00	8,109.00	7,776.00	5,059.00	11,771.00	7,886.00	7,181.00	6,651.00	5,118.00	5,118.00	5,118.00	5,118.00	5,118.00	5,118.00	5,118.00	5,118.00	5,118.00	5,118.00	
8	7,300.00	5,767.00	5,384.00	5,220.00	11,771.00	5,680.00	5,174.00	10,529.00	9,196.00	8,863.00	5,700.00	11,771.00	8,963.00	8,160.00	7,300.00	5,767.00	5,767.00	5,767.00	5,767.00	5,767.00	5,767.00	5,767.00	5,767.00	5,767.00	5,767.00	
9	7,949.00	6,416.00	6,033.00	5,801.00	11,771.00	6,349.00	5,782.00	11,616.00	10,283.00	9,950.00	6,341.00	11,771.00	10,040.00	9,139.00	7,949.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	
10	7,949.00	6,416.00	6,033.00	5,801.00	11,771.00	6,349.00	5,782.00	11,616.00	10,283.00	9,950.00	6,341.00	11,771.00	10,040.00	9,139.00	7,949.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	
11	7,949.00	6,416.00	6,033.00	5,801.00	11,771.00	6,349.00	5,782.00	11,616.00	10,283.00	9,950.00	6,341.00	11,771.00	10,040.00	9,139.00	7,949.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	
12	7,949.00	6,416.00	6,033.00	5,801.00	11,771.00	6,349.00	5,782.00	11,616.00	10,283.00	9,950.00	6,341.00	11,771.00	10,040.00	9,139.00	7,949.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	
13	7,949.00	6,416.00	6,033.00	5,801.00	11,771.00	6,349.00	5,782.00	11,616.00	10,283.00	9,950.00	6,341.00	11,771.00	10,040.00	9,139.00	7,949.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	
14	7,949.00	6,416.00	6,033.00	5,801.00	11,771.00	6,349.00	5,782.00	11,616.00	10,283.00	9,950.00	6,341.00	11,771.00	10,040.00	9,139.00	7,949.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	
15	7,949.00	6,416.00	6,033.00	5,801.00	11,771.00	6,349.00	5,782.00	11,616.00	10,283.00	9,950.00	6,341.00	11,771.00	10,040.00	9,139.00	7,949.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	
16	7,949.00	6,416.00	6,033.00	5,801.00	11,771.00	6,349.00	5,782.00	11,616.00	10,283.00	9,950.00	6,341.00	11,771.00	10,040.00	9,139.00	7,949.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	6,416.00	
17	8,598.00	7,065.00	6,682.00	6,382.00	11,771.00	7,018.00	6,390.00	12,703.00	11,370.00	11,037.00	6,982.00	11,771.00	11,117.00	10,118.00	8,598.00	7,065.00	7,065.00	7,065.00	7,065.00	7,065.00	7,065.00	7,065.00	7,065.00	7,065.00	7,065.00	
18	9,247.00	7,714.00	7,331.00	6,963.00	11,771.00	7,687.00	6,998.00	13,790.00	12,457.00	12,124.00	7,623.00	11,771.00	12,194.00	11,097.00	9,247.00	7,714.00	7,714.00	7,714.00	7,714.00	7,714.00	7,714.00	7,714.00	7,714.00	7,714.00	7,714.00	
Each Add'l Credit Hour	649.00	649.00	649.00	581.00	-na-	669.00	608.00	1,087.00	1,087.00	1,087.00	641.00	-na-	1,077.00	979.00	649.00	649.00	649.00	649.00	649.00	649.00	649.00	649.00	649.00	649.00		

UNIVERSITY OF OREGON

Summer 2023 Graduate Tuition Rates

COLLEGE OF DESIGN

Summer Graduate																	Nonresident									
Resident																	Nonresident									
Credits	Architecture and Interior		Landscape		Historic		Sports Product		Planning, Public Policy, and Management		History of Art and		Architecture and Interior		Landscape		Historic		Sports Product		Planning, Public Policy, and Management		History of Art and			
	Architecture	Architecture	Architecture	Architecture	Preservation	Art	Design	Management	Architecture	Architecture	Architecture	Architecture	Architecture	Architecture	Architecture	Preservation	Art	Design	Management	Architecture	Architecture	Architecture	Architecture	Architecture	Architecture	Architecture
1	665.00	665.00	665.00	665.00	665.00	657.00	661.00	683.00	669.00	793.00	793.00	793.00	783.00	788.00	817.00	798.00	1,297.00	1,297.00	1,297.00	1,277.00	1,287.00	1,345.00	1,307.00	1,297.00	1,297.00	1,297.00
2	1,059.00	1,059.00	1,059.00	1,059.00	1,059.00	1,043.00	1,051.00	1,095.00	1,067.00	1,801.00	1,801.00	1,801.00	1,783.00	1,786.00	1,873.00	1,816.00	2,305.00	2,305.00	2,305.00	2,265.00	2,285.00	2,401.00	2,325.00	2,305.00	2,305.00	2,305.00
3	1,453.00	1,453.00	1,453.00	1,453.00	1,453.00	1,429.00	1,441.00	1,507.00	1,465.00	2,809.00	2,809.00	2,809.00	2,759.00	2,784.00	2,929.00	2,834.00	3,313.00	3,313.00	3,313.00	3,253.00	3,283.00	3,457.00	3,343.00	3,313.00	3,313.00	3,313.00
4	1,847.00	1,847.00	1,847.00	1,847.00	1,847.00	1,815.00	1,831.00	1,919.00	1,863.00	4,825.00	4,825.00	4,825.00	4,735.00	4,780.00	5,041.00	4,870.00	2,201.00	2,201.00	2,201.00	2,151.00	2,171.00	2,295.00	2,186.00	2,201.00	2,201.00	2,201.00
5	2,241.00	2,241.00	2,241.00	2,241.00	2,241.00	2,201.00	2,221.00	2,331.00	2,261.00	5,329.00	5,329.00	5,329.00	5,229.00	5,279.00	5,569.00	5,379.00	3,471.00	3,471.00	3,471.00	3,421.00	3,421.00	4,241.00	4,281.00	4,513.00	4,361.00	4,241.00
6	2,635.00	2,635.00	2,635.00	2,635.00	2,635.00	2,587.00	2,611.00	2,743.00	2,659.00	6,841.00	6,841.00	6,841.00	6,711.00	6,776.00	7,153.00	6,906.00	3,173.00									

UNIVERSITY OF OREGON

Academic Year 2022-23 Graduate Tuition Rates

COLLEGE OF ARTS AND SCIENCES

GRADUATE SCHOOL

Academic Year Graduate												
Credits	Resident				Nonresident				Academic Year Graduate			
	CAS		CAS		CAS		CAS		Resident		Nonresident	
	Electrochemist	ry Masters	Electrochemist	CAS	Electrochemist	ry Masters	Electrochemist	CAS	Master / Doctoral	Masters / Doctoral	Master / Doctoral	Masters / Doctoral
	Masters / Doctoral	Internship (EMIP)	Masters	Psychology Online	Masters / Doctoral	Internship (EMIP)	Masters	Psychology Online	Credits	Credits	Credits	Credits
1	593.00	592.00	640.00	569.00	1,073.00	592.00	1,073.00	569.00	1	593.00	1,073.00	593.00
2	1,186.00	1,184.00	1,280.00	1,138.00	2,146.00	1,184.00	2,146.00	1,138.00	2	1,186.00	2,146.00	1,186.00
3	1,779.00	1,776.00	1,920.00	1,707.00	3,219.00	1,776.00	3,219.00	1,707.00	3	1,779.00	3,219.00	1,779.00
4	2,372.00	2,368.00	2,560.00	2,276.00	4,292.00	2,368.00	4,292.00	2,276.00	4	2,372.00	4,292.00	2,372.00
5	2,965.00	2,960.00	3,200.00	2,845.00	5,365.00	2,960.00	5,365.00	2,845.00	5	2,965.00	5,365.00	2,965.00
6	3,558.00	3,552.00	3,840.00	3,414.00	6,438.00	3,552.00	6,438.00	3,414.00	6	3,558.00	6,438.00	3,558.00
7	4,151.00	4,144.00	4,480.00	3,983.00	7,511.00	4,144.00	7,511.00	3,983.00	7	4,151.00	7,511.00	4,151.00
8	4,744.00	4,736.00	5,120.00	4,552.00	8,584.00	4,736.00	8,584.00	4,552.00	8	4,744.00	8,584.00	4,744.00
9	5,337.00	5,328.00	5,760.00	5,121.00	9,657.00	5,328.00	9,657.00	5,121.00	9	5,337.00	9,657.00	5,337.00
10	5,337.00	5,920.00	5,760.00	5,121.00	9,657.00	5,920.00	9,657.00	5,121.00	10	5,337.00	9,657.00	5,337.00
11	5,337.00	6,512.00	5,760.00	5,121.00	9,657.00	6,512.00	9,657.00	5,121.00	11	5,337.00	9,657.00	5,337.00
12	5,337.00	7,104.00	5,760.00	5,121.00	9,657.00	7,104.00	9,657.00	5,121.00	12	5,337.00	9,657.00	5,337.00
13	5,337.00	7,696.00	5,760.00	5,121.00	9,657.00	7,696.00	9,657.00	5,121.00	13	5,337.00	9,657.00	5,337.00
14	5,337.00	8,288.00	5,760.00	5,121.00	9,657.00	8,288.00	9,657.00	5,121.00	14	5,337.00	9,657.00	5,337.00
15	5,337.00	8,880.00	5,760.00	5,121.00	9,657.00	8,880.00	9,657.00	5,121.00	15	5,337.00	9,657.00	5,337.00
16	5,337.00	9,472.00	5,760.00	5,121.00	9,657.00	9,472.00	9,657.00	5,121.00	16	5,337.00	9,657.00	5,337.00
17	5,930.00	10,064.00	6,400.00	5,690.00	10,730.00	10,064.00	10,730.00	5,690.00	17	5,930.00	10,730.00	5,930.00
18	6,523.00	10,656.00	7,040.00	6,259.00	11,803.00	10,656.00	11,803.00	6,259.00	18	6,523.00	11,803.00	6,523.00
Each Add'l Credit Hour	593.00	592.00	640.00	569.00	1,073.00	592.00	1,073.00	569.00	Each Add'l Credit Hour	593.00	1,073.00	593.00

UNIVERSITY OF OREGON

Summer 2023 Graduate Tuition Rates

COLLEGE OF ARTS AND SCIENCES

GRADUATE SCHOOL

Summer Graduate												
Credits	Resident				Nonresident				Summer Graduate			
	CAS		CAS		CAS		CAS		Resident		Nonresident	
	Electrochemist	ry Masters	Electrochemist	CAS	Electrochemist	ry Masters	Electrochemist	CAS	Master / Doctoral	Masters / Doctoral	Master / Doctoral	Masters / Doctoral
	Masters / Doctoral	Internship (EMIP)	Masters	Psychology Online	Masters / Doctoral	Internship (EMIP)	Masters	Psychology Online	Credits	Credits	Credits	Credits
1	416.00	592.00	640.00	569.00	583.00	592.00	1,073.00	569.00	1	416.00	583.00	583.00
2	758.00	1,184.00	1,280.00	1,138.00	1,166.00	1,184.00	2,146.00	1,138.00	2	758.00	1,166.00	1,166.00
3	1,100.00	1,776.00	1,920.00	1,707.00	1,749.00	1,776.00	3,219.00	1,707.00	3	1,100.00	1,749.00	1,749.00
4	1,442.00	2,368.00	2,560.00	2,276.00	2,332.00	2,368.00	4,292.00	2,276.00	4	1,442.00	2,332.00	2,332.00
5	1,784.00	2,960.00	3,200.00	2,845.00	2,915.00	2,960.00	5,365.00	2,845.00	5	1,784.00	2,915.00	2,915.00
6	2,126.00	3,552.00	3,840.00	3,414.00	3,498.00	3,552.00	6,438.00	3,414.00	6	2,126.00	3,498.00	3,498.00
7	2,468.00	4,144.00	4,480.00	3,983.00	4,081.00	4,144.00	7,511.00	3,983.00	7	2,468.00	4,081.00	4,081.00
8	2,810.00	4,736.00	5,120.00	4,552.00	4,664.00	4,736.00	8,584.00	4,552.00	8	2,810.00	4,664.00	4,664.00
9	3,152.00	5,328.00	5,760.00	5,121.00	5,247.00	5,328.00	9,657.00	5,121.00	9	3,152.00	5,247.00	5,247.00
10	3,494.00	5,920.00	5,760.00	5,121.00	5,830.00	5,920.00	9,657.00	5,121.00	10	3,494.00	5,830.00	5,830.00
11	3,836.00	6,512.00	5,760.00	5,121.00	6,413.00	6,512.00	9,657.00	5,121.00	11	3,836.00	6,413.00	6,413.00
12	4,178.00	7,104.00	5,760.00	5,121.00	6,996.00	7,104.00	9,657.00	5,121.00	12	4,178.00	6,996.00	6,996.00
13	4,520.00	7,696.00	5,760.00	5,121.00	7,579.00	7,696.00	9,657.00	5,121.00	13	4,520.00	7,579.00	7,579.00
14	4,862.00	8,288.00	5,760.00	5,121.00	8,162.00	8,288.00	9,657.00	5,121.00	14	4,862.00	8,162.00	8,162.00
15	5,204.00	8,880.00	5,760.00	5,121.00	8,745.00	8,880.00	9,657.00	5,121.00	15	5,204.00	8,745.00	8,745.00
16	5,546.00	9,472.00	5,760.00	5,121.00	9,328.00	9,472.00	9,657.00	5,121.00	16	5,546.00	9,328.00	9,328.00
17	5,888.00	10,064.00	6,400.00	5,690.00	9,911.00	10,064.00	10,730.00	5,690.00	17	5,888.00	9,911.00	9,911.00
18	6,230.00	10,656.00	7,040.00	6,259.00	10,494.00	10,656.00	11,803.00	6,259.00	18	6,230.00	10,494.00	10,494.00
Each Add'l Credit Hour	342.00	592.00	640.00	569.00	583.00	592.00	1,073.00	569.00	Each Add'l Credit Hour	342.00	583.00	583.00

Please see Graduate Tuition Notes.

## UNIVERSITY OF OREGON

## Academic Year 2022-23 Graduate Tuition Rates

KNIGHT CAMPUS

Academic Year Graduate					
	Resident		Nonresident		
Credits	Industrial Internship		Industrial Internship		
	Program	Bioengineering	Program	Bioengineering	
1	592.00	606.00	592.00	1,086.00	
2	1,184.00	1,212.00	1,184.00	2,172.00	
3	1,776.00	1,818.00	1,776.00	3,258.00	
4	2,368.00	2,424.00	2,368.00	4,344.00	
5	2,960.00	3,030.00	2,960.00	5,430.00	
6	3,552.00	3,636.00	3,552.00	6,516.00	
7	4,144.00	4,242.00	4,144.00	7,602.00	
8	4,736.00	4,848.00	4,736.00	8,688.00	
9	5,328.00	5,454.00	5,328.00	9,774.00	
10	5,920.00	5,454.00	5,920.00	9,774.00	
11	6,512.00	5,454.00	6,512.00	9,774.00	
12	7,104.00	5,454.00	7,104.00	9,774.00	
13	7,696.00	5,454.00	7,696.00	9,774.00	
14	8,288.00	5,454.00	8,288.00	9,774.00	
15	8,880.00	5,454.00	8,880.00	9,774.00	
16	9,472.00	5,454.00	9,472.00	9,774.00	
17	10,064.00	6,060.00	10,064.00	10,860.00	
18	10,656.00	6,666.00	10,656.00	11,946.00	
<i>Each Add'l Credit Hour</i>	592.00	606.00	592.00	1,086.00	

Summer 2023 Graduate Tuition rates are approved next year.

**UNIVERSITY OF OREGON**
**Academic Year 2022-23 Graduate Tuition Rates**
**COLLEGE OF EDUCATION**

Academic Year Graduate											
Credits	Resident				Nonresident						
	Masters /		Doctoral		Masters /		Doctoral		Masters /		
	Credits	Doctoral	DED	Supervision	Masters	Clinical Science	Doctoral	DED	Supervision	Masters	Clinical Science
1	1,199.00	1,199.00		1,256.00	1,317.00		1,514.00	1,514.00	1,571.00	1,628.00	
2	1,861.00	1,861.00		1,974.00	2,107.00		2,491.00	2,491.00	2,604.00	2,729.00	
3	2,523.00	2,523.00		2,692.00	2,897.00		3,468.00	3,468.00	3,637.00	3,830.00	
4	3,185.00	3,185.00		3,410.00	3,687.00		4,445.00	4,445.00	4,670.00	4,931.00	
5	3,847.00	3,847.00		4,128.00	4,477.00		5,422.00	5,422.00	5,703.00	6,032.00	
6	4,509.00	4,509.00		4,846.00	5,267.00		6,399.00	6,399.00	6,736.00	7,133.00	
7	5,171.00	5,171.00		5,564.00	6,057.00		7,376.00	7,376.00	7,769.00	8,234.00	
8	5,833.00	5,833.00		6,282.00	6,847.00		8,353.00	8,353.00	8,802.00	9,335.00	
9	6,495.00	6,495.00		7,000.00	7,637.00		9,330.00	9,330.00	9,835.00	10,436.00	
10	6,495.00	6,495.00		7,000.00	7,637.00		9,330.00	9,330.00	9,835.00	10,436.00	
11	6,495.00	6,495.00		7,000.00	7,637.00		9,330.00	9,330.00	9,835.00	10,436.00	
12	6,495.00	6,495.00		7,000.00	7,637.00		9,330.00	9,330.00	9,835.00	10,436.00	
13	6,495.00	6,495.00		7,000.00	7,637.00		9,330.00	9,330.00	9,835.00	10,436.00	
14	6,495.00	6,495.00		7,000.00	7,637.00		9,330.00	9,330.00	9,835.00	10,436.00	
15	6,495.00	6,495.00		7,000.00	7,637.00		9,330.00	9,330.00	9,835.00	10,436.00	
16	6,495.00	6,495.00		7,000.00	7,637.00		9,330.00	9,330.00	9,835.00	10,436.00	
17	7,157.00	7,157.00		7,718.00	8,427.00		10,307.00	10,307.00	10,868.00	11,537.00	
18	7,819.00	7,819.00		8,436.00	9,217.00		11,284.00	11,284.00	11,901.00	12,638.00	
<i>Each Add'l Credit Hour</i>	662.00	662.00		718.00	790.00		977.00	977.00	1,033.00	1,101.00	

**UNIVERSITY OF OREGON**
**Summer 2023 Graduate Tuition Rates**
**COLLEGE OF EDUCATION**

Summer Graduate											
Credits	Resident				Nonresident						
	Masters /		Doctoral		Masters /		Doctoral		Masters /		
	Credits	Doctoral	DED	Supervision	Masters	Clinical Science	Doctoral	DED	Supervision	Masters	Clinical Science
1	687.00	687.00		720.00	774.00		773.00	773.00	799.00	851.00	
2	1,104.00	1,104.00		1,170.00	1,278.00		1,276.00	1,276.00	1,328.00	1,427.00	
3	1,521.00	1,521.00		1,620.00	1,782.00		1,779.00	1,779.00	1,857.00	2,003.00	
4	1,938.00	1,938.00		2,070.00	2,286.00		2,282.00	2,282.00	2,386.00	2,579.00	
5	2,355.00	2,355.00		2,520.00	2,790.00		2,785.00	2,785.00	2,915.00	3,155.00	
6	2,772.00	2,772.00		2,970.00	3,294.00		3,288.00	3,288.00	3,444.00	3,731.00	
7	3,189.00	3,189.00		3,420.00	3,798.00		3,791.00	3,791.00	3,973.00	4,307.00	
8	3,606.00	3,606.00		3,870.00	4,302.00		4,294.00	4,294.00	4,502.00	4,883.00	
9	4,023.00	4,023.00		4,320.00	4,806.00		4,797.00	4,797.00	5,031.00	5,459.00	
10	4,440.00	4,440.00		4,770.00	5,310.00		5,300.00	5,300.00	5,560.00	6,035.00	
11	4,857.00	4,857.00		5,220.00	5,814.00		5,803.00	5,803.00	6,089.00	6,611.00	
12	5,274.00	5,274.00		5,670.00	6,318.00		6,306.00	6,306.00	6,618.00	7,187.00	
13	5,691.00	5,691.00		6,120.00	6,822.00		6,809.00	6,809.00	7,147.00	7,763.00	
14	6,108.00	6,108.00		6,570.00	7,326.00		7,312.00	7,312.00	7,676.00	8,339.00	
15	6,525.00	6,525.00		7,020.00	7,830.00		7,815.00	7,815.00	8,205.00	8,915.00	
16	6,942.00	6,942.00		7,470.00	8,334.00		8,318.00	8,318.00	8,734.00	9,491.00	
17	7,359.00	7,359.00		7,920.00	8,838.00		8,821.00	8,821.00	9,263.00	10,067.00	
18	7,776.00	7,776.00		8,370.00	9,342.00		9,324.00	9,324.00	9,792.00	10,643.00	
<i>Each Add'l Credit Hour</i>	417.00	417.00		450.00	504.00		503.00	503.00	529.00	576.00	

Please see Graduate Tuition Notes.

UNIVERSITY OF OREGON

Academic Year 2022-23 Graduate Tuition Rates

COLLEGE OF BUSINESS

Academic Year Graduate															Nonresident						
Resident															Nonresident						
Credits	Sports Product							Sports Product							Sports Product						
	MBA	Masters In Accounting	Masters In Finance	Mngt (Face-to-face)	Sports Product Mngt (ONLINE)	OEMBA	Doctoral Programs	MBA	Masters In Accounting	Masters In Finance	Mngt (Face-to-face)	Sports Product Mngt (ONLINE)	OEMBA	Doctoral Programs	MBA	Masters In Accounting	Masters In Finance	Mngt (Face-to-face)	Sports Product Mngt (ONLINE)	OEMBA	Doctoral Programs
1	2,860.00	1,653.00	920.00	15,600.00	11,142.00	1,500.00	532.00	3,400.00	1,937.00	1,206.00	15,600.00	11,142.00	1,500.00	891.00	4,798.00	2,276.00	1,840.00	15,600.00	11,142.00	3,000.00	1,782.00
2	3,798.00	2,276.00	1,840.00	15,600.00	11,142.00	3,000.00	1,064.00	4,780.00	2,846.00	2,412.00	15,600.00	11,142.00	3,000.00	1,782.00	4,736.00	2,899.00	2,760.00	15,600.00	11,142.00	4,500.00	2,673.00
3	5,674.00	3,522.00	3,680.00	15,600.00	11,142.00	6,000.00	2,128.00	7,540.00	4,664.00	4,824.00	15,600.00	11,142.00	6,000.00	3,564.00	6,612.00	4,145.00	4,600.00	15,600.00	11,142.00	7,500.00	4,455.00
4	7,550.00	4,768.00	5,520.00	15,600.00	11,142.00	9,000.00	3,192.00	10,300.00	6,482.00	7,236.00	15,600.00	11,142.00	9,000.00	5,346.00	8,488.00	5,391.00	6,440.00	15,600.00	11,142.00	10,500.00	6,237.00
5	9,426.00	6,014.00	7,360.00	15,600.00	11,142.00	12,000.00	4,256.00	13,060.00	8,300.00	9,648.00	15,600.00	11,142.00	12,000.00	7,128.00	10,364.00	6,639.00	8,280.00	15,600.00	11,142.00	13,500.00	8,019.00
6	10,364.00	6,639.00	8,280.00	15,600.00	11,142.00	13,500.00	4,788.00	14,440.00	9,209.00	10,855.00	15,600.00	11,142.00	13,500.00	8,019.00	10,364.00	6,639.00	8,280.00	15,600.00	11,142.00	13,500.00	8,019.00
7	10,364.00	6,639.00	8,280.00	15,600.00	11,142.00	13,500.00	4,788.00	14,440.00	9,209.00	10,855.00	15,600.00	11,142.00	13,500.00	8,019.00	10,364.00	6,639.00	8,280.00	15,600.00	11,142.00	13,500.00	8,019.00
8	10,364.00	6,639.00	8,280.00	15,600.00	11,142.00	13,500.00	4,788.00	14,440.00	9,209.00	10,855.00	15,600.00	11,142.00	13,500.00	8,019.00	10,364.00	6,639.00	8,280.00	15,600.00	11,142.00	13,500.00	8,019.00
9	10,364.00	6,639.00	8,280.00	15,600.00	11,142.00	13,500.00	4,788.00	14,440.00	9,209.00	10,855.00	15,600.00	11,142.00	13,500.00	8,019.00	10,364.00	6,639.00	8,280.00	15,600.00	11,142.00	13,500.00	8,019.00
10	10,364.00	6,639.00	8,280.00	15,600.00	11,142.00	13,500.00	4,788.00	14,440.00	9,209.00	10,855.00	15,600.00	11,142.00	13,500.00	8,019.00	10,364.00	6,639.00	8,280.00	15,600.00	11,142.00	13,500.00	8,019.00
11	10,364.00	6,639.00	8,280.00	15,600.00	11,142.00	13,500.00	4,788.00	14,440.00	9,209.00	10,855.00	15,600.00	11,142.00	13,500.00	8,019.00	10,364.00	6,639.00	8,280.00	15,600.00	11,142.00	13,500.00	8,019.00
12	10,364.00	6,639.00	8,280.00	15,600.00	11,142.00	13,500.00	4,788.00	14,440.00	9,209.00	10,855.00	15,600.00	11,142.00	13,500.00	8,019.00	10,364.00	6,639.00	8,280.00	15,600.00	11,142.00	13,500.00	8,019.00
13	10,364.00	6,639.00	8,280.00	15,600.00	11,142.00	13,500.00	4,788.00	14,440.00	9,209.00	10,855.00	15,600.00	11,142.00	13,500.00	8,019.00	10,364.00	6,639.00	8,280.00	15,600.00	11,142.00	13,500.00	8,019.00
14	10,364.00	6,639.00	8,280.00	15,600.00	11,142.00	13,500.00	4,788.00	14,440.00	9,209.00	10,855.00	15,600.00	11,142.00	13,500.00	8,019.00	10,364.00	6,639.00	8,280.00	15,600.00	11,142.00	13,500.00	8,019.00
15	10,364.00	6,639.00	8,280.00	15,600.00	11,142.00	13,500.00	4,788.00	14,440.00	9,209.00	10,855.00	15,600.00	11,142.00	13,500.00	8,019.00	10,364.00	6,639.00	8,280.00	15,600.00	11,142.00	13,500.00	8,019.00
16	10,364.00	6,639.00	8,280.00	15,600.00	11,142.00	13,500.00	4,788.00	14,440.00	9,209.00	10,855.00	15,600.00	11,142.00	13,500.00	8,019.00	10,364.00	6,639.00	8,280.00	15,600.00	11,142.00	13,500.00	8,019.00
17	10,364.00	7,262.00	8,280.00	15,600.00	11,142.00	13,500.00	5,320.00	14,440.00	10,118.00	10,855.00	15,600.00	11,142.00	13,500.00	8,910.00	10,364.00	7,885.00	8,280.00	15,600.00	11,142.00	13,500.00	9,801.00
18	10,364.00	7,885.00	8,280.00	15,600.00	11,142.00	13,500.00	5,852.00	14,440.00	11,027.00	10,855.00	15,600.00	11,142.00	13,500.00	9,801.00	938.00	623.00	920.00	-na-	-na-	-na-	891.00
Each Add'l Credit Hour	938.00	623.00	920.00	-na-	-na-	-na-	532.00	1,380.00	909.00	1,206.00	-na-	-na-	-na-	891.00							

UNIVERSITY OF OREGON

Summer 2023 Graduate Tuition Rates

COLLEGE OF BUSINESS

Summer Graduate															Nonresident								
Resident															Nonresident								
Credits	Sports Product							Sports Product							Sports Product								
	MBA	Masters In Accounting	Masters In Finance	Mngt (Face-to-face)	Sports Product Mngt (ONLINE)	OEMBA	Doctoral Programs	MBA	Masters In Accounting	Masters In Finance	Mngt (Face-to-face)	Sports Product Mngt (ONLINE)	OEMBA	Doctoral Programs	MBA	Masters In Accounting	Masters In Finance	Mngt (Face-to-face)	Sports Product Mngt (ONLINE)	OEMBA	Doctoral Programs		
1	1,417.28	879.00		15,600.00		1,500.00	385.00	1,571.00	982.00		15,600.00		1,500.00	511.00	2,014.28	1,257.00		15,600.00		3,000.00	944.00		
2	2,014.28	1,257.00		15,600.00		3,000.00	696.00	2,277.00	1,436.00		15,600.00		3,000.00	944.00	2,611.28	1,635.00		15,600.00		4,500.00	1,377.00		
3	2,611.28	1,635.00		15,600.00		4,500.00	1,007.00	2,983.00	1,890.00		15,600.00		4,500.00	1,377.00	3,208.28	2,013.00		15,600.00		6,000.00	1,810.00		
4	3,208.28	2,013.00		15,600.00		6,000.00	1,318.00	3,689.00	2,344.00		15,600.00		6,000.00	1,810.00	3,805.28	2,391.00		15,600.00		7,500.00	2,243.00		
5	3,805.28	2,391.00		15,600.00		7,500.00	1,629.00	4,395.00	2,798.00		15,600.00		7,500.00	2,243.00	4,402.28	2,769.00		15,600.00		9,000.00	2,676.00		
6	4,402.28	2,769.00		15,600.00		9,000.00	1,940.00	5,101.00	3,252.00		15,600.00		9,000.00	2,676.00	4,999.28	3,147.00		15,600.00		10,500.00	3,109.00		
7	4,999.28	3,147.00		15,600.00		10,500.00	2,251.00	5,807.00	3,706.00		15,600.00		10,500.00	3,109.00	5,596.28	3,525.00	RATES	15,600.00	RATES	12,000.00	3,542.00		
8	5,596.28	3,525.00	RATES	15,600.00	RATES	12,000.00	2,562.00	6,513.00	4,160.00	RATES	15,600.00	RATES	12,000.00	3,542.00	6,193.28	3,903.00	APPROVED	15,600.00	APPROVED	13,500.00	3,975.00		
9	6,193.28	3,903.00	APPROVED	15,600.00	APPROVED	13,500.00	2,873.00	7,219.00	4,614.00	APPROVED	15,600.00	APPROVED	13,500.00	3,975.00	6,790.28	4,281.00	FOR SUMMER	15,600.00	FOR SUMMER	13,500.00	4,408.00		
10	6,790.28	4,281.00	FOR SUMMER	15,600.00	FOR SUMMER	13,500.00	3,184.00	7,925.00	5,068.00	FOR SUMMER	15,600.00	FOR SUMMER	13,500.00	4,408.00	7,387.28	4,659.00	2022	15,600.00	2022	13,500.00	4,841.00		
11	7,387.28	4,659.00	2022	15,600.00	2022	13,500.00	3,495.00	8,631.00	5,522.00	2022	15,600.00	2022	13,500.00	4,841.00	7,984.28	5,037.00	15,600.00	3,806.00	9,337.00	5,976.00	13,500.00	5,274.00	
12	7,984.28	5,037.00	15,600.00	13,500.00	4,117.00	10,043.00	6,430.00	10,403.00	6,430.00	15,600.00	13,500.00	5,976.00	13,500.00	5,274.00	8,581.28	5,415.00	15,600.00	13,500.00	4,117.00	10,749.00	6,884.00	13,500.00	6,140.00
13	8,581.28	5,415.00	15,600.00	13,500.00	4,428.00	10,749.00	11,455.00	11,455.00	7,338.00	15,600.00	13,500.00	5,976.00	13,500.00	6,140.00	9,178.28	5,793.00	15,600.00	13,500.00	4,428.00	10,749.00	11,455.00	13,500.00	6,573.00
14	9,178.28	5,793.00	15,600.00	13,500.00	4,739.00	12,867.00	8,246.00	12,867.00	8,246.00	15,600.0													

**UNIVERSITY OF OREGON**
**Academic Year 2022-23 Graduate Tuition Rates**
**SCHOOL OF JOURNALISM AND COMMUNICATION**

Academic Year Graduate									
	Resident				Nonresident				
Credits	Media Studies Masters / Doctoral	Advertising and Brand Responsibility	Graduate Strategic Comm	Graduate Multimedia	Media Studies Masters / Doctoral	Advertising and Brand Responsibility	Graduate Strategic Comm	Graduate Multimedia	
1	623.00	623.00	690.00	694.00	979.00	979.00	951.00	955.00	
2	1,246.00	1,246.00	1,380.00	1,388.00	1,958.00	1,958.00	1,902.00	1,910.00	
3	1,869.00	1,869.00	2,070.00	2,082.00	2,937.00	2,937.00	2,853.00	2,865.00	
4	2,492.00	2,492.00	2,760.00	2,776.00	3,916.00	3,916.00	3,804.00	3,820.00	
5	3,115.00	3,115.00	3,450.00	3,470.00	4,895.00	4,895.00	4,755.00	4,775.00	
6	3,738.00	3,738.00	4,140.00	4,164.00	5,874.00	5,874.00	5,706.00	5,730.00	
7	4,361.00	4,361.00	4,830.00	4,858.00	6,853.00	6,853.00	6,657.00	6,685.00	
8	4,984.00	4,984.00	5,520.00	5,552.00	7,832.00	7,832.00	7,608.00	7,640.00	
9	5,607.00	5,607.00	6,210.00	6,246.00	8,811.00	8,811.00	8,559.00	8,595.00	
10	5,607.00	5,607.00	6,210.00	6,246.00	8,811.00	8,811.00	8,559.00	8,595.00	
11	5,607.00	5,607.00	6,210.00	6,246.00	8,811.00	8,811.00	8,559.00	8,595.00	
12	5,607.00	5,607.00	6,210.00	6,246.00	8,811.00	8,811.00	8,559.00	8,595.00	
13	5,607.00	5,607.00	6,210.00	6,246.00	8,811.00	8,811.00	8,559.00	8,595.00	
14	5,607.00	5,607.00	6,210.00	6,246.00	8,811.00	8,811.00	8,559.00	8,595.00	
15	5,607.00	5,607.00	6,210.00	6,246.00	8,811.00	8,811.00	8,559.00	8,595.00	
16	5,607.00	5,607.00	6,210.00	6,246.00	8,811.00	8,811.00	8,559.00	8,595.00	
17	6,230.00	6,230.00	6,900.00	6,940.00	9,790.00	9,790.00	9,510.00	9,550.00	
18	6,853.00	6,853.00	7,590.00	7,634.00	10,769.00	10,769.00	10,461.00	10,505.00	
<i>Each Add'l Credit Hour</i>	623.00	623.00	690.00	694.00	979.00	979.00	951.00	955.00	

**UNIVERSITY OF OREGON**
**Summer 2023 Graduate Tuition Rates**
**SCHOOL OF JOURNALISM AND COMMUNICATION**

Summer Graduate									
	Resident				Nonresident				
Credits	Media Studies Masters / Doctoral	Advertising and Brand Responsibility	Graduate Strategic Comm	Graduate Multimedia	Media Studies Masters / Doctoral	Advertising and Brand Responsibility	Graduate Strategic Comm	Graduate Multimedia	
1	437.00	437.00	478.00	480.00	555.00	555.00	541.00	543.00	
2	802.00	802.00	884.00	888.00	1,032.00	1,032.00	1,004.00	1,008.00	
3	1,167.00	1,167.00	1,290.00	1,296.00	1,509.00	1,509.00	1,467.00	1,473.00	
4	1,532.00	1,532.00	1,696.00	1,704.00	1,986.00	1,986.00	1,930.00	1,938.00	
5	1,897.00	1,897.00	2,102.00	2,112.00	2,463.00	2,463.00	2,393.00	2,403.00	
6	2,262.00	2,262.00	2,508.00	2,520.00	2,940.00	2,940.00	2,856.00	2,868.00	
7	2,627.00	2,627.00	2,914.00	2,928.00	3,417.00	3,417.00	3,319.00	3,333.00	
8	2,992.00	2,992.00	3,320.00	3,336.00	3,894.00	3,894.00	3,782.00	3,798.00	
9	3,357.00	3,357.00	3,726.00	3,744.00	4,371.00	4,371.00	4,245.00	4,263.00	
10	3,722.00	3,722.00	4,132.00	4,152.00	4,848.00	4,848.00	4,708.00	4,728.00	
11	4,087.00	4,087.00	4,538.00	4,560.00	5,325.00	5,325.00	5,171.00	5,193.00	
12	4,452.00	4,452.00	4,944.00	4,968.00	5,802.00	5,802.00	5,634.00	5,658.00	
13	4,817.00	4,817.00	5,350.00	5,376.00	6,279.00	6,279.00	6,097.00	6,123.00	
14	5,182.00	5,182.00	5,756.00	5,784.00	6,756.00	6,756.00	6,560.00	6,588.00	
15	5,547.00	5,547.00	6,162.00	6,192.00	7,233.00	7,233.00	7,023.00	7,053.00	
16	5,912.00	5,912.00	6,568.00	6,600.00	7,710.00	7,710.00	7,486.00	7,518.00	
17	6,277.00	6,277.00	6,974.00	7,008.00	8,187.00	8,187.00	7,949.00	7,983.00	
18	6,642.00	6,642.00	7,380.00	7,416.00	8,664.00	8,664.00	8,412.00	8,448.00	
<i>Each Add'l Credit Hour</i>	365.00	365.00	406.00	408.00	477.00	477.00	463.00	465.00	

Please see Graduate Tuition Notes.

**UNIVERSITY OF OREGON****Academic Year 2022-23 Graduate Tuition Rates****SCHOOL OF LAW**

Academic Year Graduate						
Credits	Resident			Nonresident		
	JD (per semester)	Conflict Resolution	LLM (per semester)	JD (per semester)	Conflict Resolution	LLM (per semester)
1	2,311.00	917.00	2,818.00	2,910.00	1,238.00	2,818.00
2	4,622.00	1,834.00	5,636.00	5,820.00	2,476.00	5,636.00
3	6,933.00	2,751.00	8,454.00	8,730.00	3,714.00	8,454.00
4	9,244.00	3,668.00	11,272.00	11,640.00	4,952.00	11,272.00
5	11,555.00	4,585.00	14,090.00	14,550.00	6,190.00	14,090.00
6	13,866.00	5,502.00	16,908.00	17,460.00	7,428.00	16,908.00
7	16,177.00	6,419.00	19,726.00	20,370.00	8,666.00	19,726.00
8	18,488.00	7,336.00	22,544.00	23,280.00	9,904.00	22,544.00
9	20,799.00	8,253.00	25,362.00	26,190.00	11,142.00	25,362.00
10	20,799.00	8,253.00	25,362.00	26,190.00	11,142.00	25,362.00
11	20,799.00	8,253.00	25,362.00	26,190.00	11,142.00	25,362.00
12	20,799.00	8,253.00	25,362.00	26,190.00	11,142.00	25,362.00
13	20,799.00	8,253.00	25,362.00	26,190.00	11,142.00	25,362.00
14	20,799.00	8,253.00	25,362.00	26,190.00	11,142.00	25,362.00
15	20,799.00	8,253.00	25,362.00	26,190.00	11,142.00	25,362.00
16	20,799.00	8,253.00	25,362.00	26,190.00	11,142.00	25,362.00
17	20,799.00	9,170.00	25,362.00	26,190.00	12,380.00	25,362.00
18	23,110.00	10,087.00	28,180.00	29,100.00	13,618.00	28,180.00
<i>Each Add'l Credit Hour</i>	2,311.00	917.00	2,818.00	2,910.00	1,238.00	2,818.00

**UNIVERSITY OF OREGON****Summer 2023 Graduate Tuition Rates****SCHOOL OF LAW**

Summer Graduate						
Credits	Resident			Nonresident		
	JD (per semester)	Conflict Resolution	LLM (per semester)	JD (per semester)	Conflict Resolution	LLM (per semester)
1	1,950.00	917.00	2,818.00	2,125.00	1,238.00	2,818.00
2	3,900.00	1,834.00	5,636.00	4,250.00	2,476.00	5,636.00
3	5,850.00	2,751.00	8,454.00	6,375.00	3,714.00	8,454.00
4	7,800.00	3,668.00	11,272.00	8,500.00	4,952.00	11,272.00
5	9,750.00	4,585.00	14,090.00	10,625.00	6,190.00	14,090.00
6	11,700.00	5,502.00	16,908.00	12,750.00	7,428.00	16,908.00
7	13,650.00	6,419.00	19,726.00	14,875.00	8,666.00	19,726.00
8	15,600.00	7,336.00	22,544.00	17,000.00	9,904.00	22,544.00
9	17,550.00	8,253.00	25,362.00	19,125.00	11,142.00	25,362.00
10	19,500.00	9,170.00	25,362.00	21,250.00	12,380.00	25,362.00
11	21,450.00	10,087.00	25,362.00	23,375.00	13,618.00	25,362.00
12	23,400.00	11,004.00	25,362.00	25,500.00	14,856.00	25,362.00
13	25,350.00	11,921.00	25,362.00	27,625.00	16,094.00	25,362.00
14	27,300.00	12,838.00	25,362.00	29,750.00	17,332.00	25,362.00
15	29,250.00	13,755.00	25,362.00	31,875.00	18,570.00	25,362.00
16	31,200.00	14,672.00	25,362.00	34,000.00	19,808.00	25,362.00
17	33,150.00	15,589.00	25,362.00	36,125.00	21,046.00	25,362.00
18	35,100.00	16,506.00	28,180.00	38,250.00	22,284.00	28,180.00
<i>Each Add'l Credit Hour</i>	1,950.00	917.00	2,818.00	2,125.00	1,238.00	2,818.00

Please see Graduate Tuition Notes.

**UNIVERSITY OF OREGON****Academic Year 2022-23 Graduate Tuition Rates****SCHOOL OF MUSIC AND DANCE**

<b>Academic Year Graduate</b>		
	<i>Resident</i>	<i>Nonresident</i>
<i>Credits</i>	Masters / Doctoral	Masters / Doctoral
1	712.00	1,128.00
2	1,249.00	2,046.00
3	1,786.00	2,964.00
4	2,323.00	3,882.00
5	2,860.00	4,800.00
6	3,397.00	5,718.00
7	3,934.00	6,636.00
8	4,471.00	7,554.00
9	5,008.00	8,472.00
10	5,008.00	8,472.00
11	5,008.00	8,472.00
12	5,008.00	8,472.00
13	5,008.00	8,472.00
14	5,008.00	8,472.00
15	5,008.00	8,472.00
16	5,008.00	8,472.00
17	5,545.00	9,390.00
18	6,082.00	10,308.00
<i>Each Add'l Credit Hour</i>	537.00	918.00

**UNIVERSITY OF OREGON****Summer 2023 Graduate Tuition Rates****SCHOOL OF MUSIC AND DANCE**

<b>Summer Graduate</b>		
	<i>Resident</i>	<i>Nonresident</i>
<i>Credits</i>	Masters / Doctoral	Masters / Doctoral
1	410.00	564.00
2	735.00	1,023.00
3	1,060.00	1,482.00
4	1,385.00	1,941.00
5	1,710.00	2,400.00
6	2,035.00	2,859.00
7	2,360.00	3,318.00
8	2,685.00	3,777.00
9	3,010.00	4,236.00
10	3,335.00	4,695.00
11	3,660.00	5,154.00
12	3,985.00	5,613.00
13	4,310.00	6,072.00
14	4,635.00	6,531.00
15	4,960.00	6,990.00
16	5,285.00	7,449.00
17	5,610.00	7,908.00
18	5,935.00	8,367.00
<i>Each Add'l Credit Hour</i>	325.00	459.00

Please see Graduate Tuition Notes.

## GRADUATE TUITION NOTES

### Notes:

1. A one-time Matriculation fee is assessed on all new and transfer students — \$490.70 Undergraduate / \$490.70 Graduate and Law.
2. Law and Law LLM students pay per semester rather than per term.
3. Education "Masters / Doctoral" includes programs in Educational Leadership; Doctoral Programs in Communication Disorders and Sciences, Critical and Socio-Cultural Studies in Education, Special Education and Early Intervention, and Master's Program in Prevention Science.
4. Education "Masters / Doctoral Supervision" includes Doctoral programs in Counseling Psychology and School Psychology; Masters Programs in Curriculum and Teaching.
5. Education "Masters Clinical Science" includes programs in Communication Disorders and Sciences and Couples and Family Therapy.
6. Journalism and Communication's Journalism Master's program falls under Media Studies.
7. LCB's Master's of Finance, OEMBA, Sport Product Management (Face-to-face), and the Sport Product Management (Online) programs charge a per quarter flat rate for enrolled students.
8. PPPM majors include Community and Regional Planning, Nonprofit Management, Planning and Public Affairs, Public Administration, and Arts Management. Museum Studies is part of History of Art and Architecture.
- 9.

Starting with the 2021-22 academic year, the Lundquist College of Business's MBA program will offer a tuition guarantee for students enrolled in the two-year full-time program (six consecutive terms not including summer). The guarantee does not cover mandatory enrollment fees. Students enrolled in fall term for the accelerated program will have tuition guaranteed for four consecutive terms (not including summer) if they maintain full-time status. Accelerated students starting in an off term would be subject to tuition adjustments through the entire program. Students enrolled in the FLEX (up to four-years) program will be subject to annual tuition increases. The tuition guarantee for a tuition cohort is for two years with the following exceptions:

- Withdrawal from the University for U.S. Military or Other U.S. National Defense Services. Students who are called to active duty in the United States military because of national emergency or because of the mobilization of the reserve forces, including the National Guard, and re-enroll at the University within one year after the completion of their active military service will be entitled to resume their two-year guarantee for time remaining in their guarantee at the time of their military withdrawal. The student must submit a petition to initiate the extension.
- Extraordinary Circumstances. Students who believe the circumstances of their situation merit an extension may appeal to the College. Because the fixed-tuition guarantee is for two years, non-military exceptions will rarely be granted.

Accelerated students who do not complete the program in four consecutive terms are subject to tuition increases. Exceptions above do not apply. The tuition guarantee does not apply to concurrent degree programs (double majors), staff or family rates, or the Executive MBA program (OEMBA).

# UNIVERSITY OF OREGON

## 2022-23 Academic Year Non-Admitted Student Tuition and Required Fees - Per Term

### RESIDENTS

#### Combination Course Level

Note: During the regular academic year nonadmitted students are restricted to a maximum of 8 credit hours.

Part-Time Students 1 - 8 Credit Hours	Course Level 100-499		Course Level 500 Plus		Building Fee	Inci- dental Fee	Health Service Fee	Rec Center Fee	Student Union Fee	Tech Fee	Total Tuition & Fees
	Credit Hour	Tuition	Credit Hour	Tuition							
1	1	278.05	0	0.00	278.05	45.00	138.25	-na-	138.50	224.50	53.00 <b>877.30</b>
	0	0.00	1	593.00	593.00	45.00	138.25	-na-	138.50	224.50	53.00 <b>1,192.25</b>
2	2	556.10	0	0.00	556.10	45.00	138.25	-na-	138.50	224.50	53.00 <b>1,155.35</b>
	0	0.00	2	1,186.00	1,186.00	45.00	138.25	-na-	138.50	224.50	53.00 <b>1,785.25</b>
	1	278.05	1	593.00	871.05	45.00	138.25	-na-	138.50	224.50	53.00 <b>1,470.30</b>
3	3	834.15	0	0.00	834.15	45.00	138.25	-na-	138.50	224.50	53.00 <b>1,433.40</b>
	0	0.00	3	1,779.00	1,779.00	45.00	138.25	-na-	138.50	224.50	53.00 <b>2,378.25</b>
	1	278.05	2	1,186.00	1,464.05	45.00	138.25	-na-	138.50	224.50	53.00 <b>2,063.30</b>
	2	556.10	1	593.00	1,149.10	45.00	138.25	-na-	138.50	224.50	53.00 <b>1,748.35</b>
4	4	1,112.20	0	0.00	1,112.20	45.00	138.25	-na-	138.50	224.50	53.00 <b>1,711.45</b>
	0	0.00	4	2,372.00	2,372.00	45.00	138.25	-na-	138.50	224.50	53.00 <b>2,971.25</b>
	1	278.05	3	1,779.00	2,057.05	45.00	138.25	-na-	138.50	224.50	53.00 <b>2,656.30</b>
	2	556.10	2	1,186.00	1,742.10	45.00	138.25	-na-	138.50	224.50	53.00 <b>2,341.35</b>
	3	834.15	1	593.00	1,427.15	45.00	138.25	-na-	138.50	224.50	53.00 <b>2,026.40</b>
5	5	1,390.25	0	0.00	1,390.25	45.00	138.25	-na-	138.50	224.50	53.00 <b>1,989.50</b>
	0	0.00	5	2,965.00	2,965.00	45.00	138.25	-na-	138.50	224.50	53.00 <b>3,564.25</b>
	1	278.05	4	2,372.00	2,650.05	45.00	138.25	-na-	138.50	224.50	53.00 <b>3,249.30</b>
	2	556.10	3	1,779.00	2,335.10	45.00	138.25	-na-	138.50	224.50	53.00 <b>2,934.35</b>
	3	834.15	2	1,186.00	2,020.15	45.00	138.25	-na-	138.50	224.50	53.00 <b>2,619.40</b>
	4	1,112.20	1	593.00	1,705.20	45.00	138.25	-na-	138.50	224.50	53.00 <b>2,304.45</b>
6	6	1,668.30	0	0.00	1,668.30	45.00	138.25	-na-	138.50	224.50	53.00 <b>2,267.55</b>
	0	0.00	6	3,558.00	3,558.00	45.00	138.25	-na-	138.50	224.50	53.00 <b>4,157.25</b>
	1	278.05	5	2,965.00	3,243.05	45.00	138.25	-na-	138.50	224.50	53.00 <b>3,842.30</b>
	2	556.10	4	2,372.00	2,928.10	45.00	138.25	-na-	138.50	224.50	53.00 <b>3,527.35</b>
	3	834.15	3	1,779.00	2,613.15	45.00	138.25	-na-	138.50	224.50	53.00 <b>3,212.40</b>
	4	1,112.20	2	1,186.00	2,298.20	45.00	138.25	-na-	138.50	224.50	53.00 <b>2,897.45</b>
	5	1,390.25	1	593.00	1,983.25	45.00	138.25	-na-	138.50	224.50	53.00 <b>2,582.50</b>

# UNIVERSITY OF OREGON

## 2022-23 Academic Year Non-Admitted Student Tuition and Required Fees - Per Term

### RESIDENTS

#### Combination Course Level

Note: During the regular academic year nonadmitted students are restricted to a maximum of 8 credit hours.

Part-Time Students 1 - 8 Credit Hours	Course Level 100-499		Course Level 500 Plus		Building Fee	Inci- dental Fee	Health Service Fee	Rec Center Fee	Student Union Fee	Tech Fee	Total Tuition & Fees
	Credit Hour	Tuition	Credit Hour	Tuition							
7	7	1,946.35	0	0.00	1,946.35	45.00	138.25	-na-	138.50	224.50	53.00 <b>2,545.60</b>
	0	0.00	7	4,151.00	4,151.00	45.00	138.25	-na-	138.50	224.50	53.00 <b>4,750.25</b>
	1	278.05	6	3,558.00	3,836.05	45.00	138.25	-na-	138.50	224.50	53.00 <b>4,435.30</b>
	2	556.10	5	2,965.00	3,521.10	45.00	138.25	-na-	138.50	224.50	53.00 <b>4,120.35</b>
	3	834.15	4	2,372.00	3,206.15	45.00	138.25	-na-	138.50	224.50	53.00 <b>3,805.40</b>
	4	1,112.20	3	1,779.00	2,891.20	45.00	138.25	-na-	138.50	224.50	53.00 <b>3,490.45</b>
	5	1,390.25	2	1,186.00	2,576.25	45.00	138.25	-na-	138.50	224.50	53.00 <b>3,175.50</b>
	6	1,668.30	1	593.00	2,261.30	45.00	138.25	-na-	138.50	224.50	53.00 <b>2,860.55</b>
8	8	2,224.40	0	0.00	2,224.40	45.00	138.25	-na-	138.50	224.50	53.00 <b>2,823.65</b>
	0	0.00	8	4,744.00	4,744.00	45.00	138.25	-na-	138.50	224.50	53.00 <b>5,343.25</b>
	1	278.05	7	4,151.00	4,429.05	45.00	138.25	-na-	138.50	224.50	53.00 <b>5,028.30</b>
	2	556.10	6	3,558.00	4,114.10	45.00	138.25	-na-	138.50	224.50	53.00 <b>4,713.35</b>
	3	834.15	5	2,965.00	3,799.15	45.00	138.25	-na-	138.50	224.50	53.00 <b>4,398.40</b>
	4	1,112.20	4	2,372.00	3,484.20	45.00	138.25	-na-	138.50	224.50	53.00 <b>4,083.45</b>
	5	1,390.25	3	1,779.00	3,169.25	45.00	138.25	-na-	138.50	224.50	53.00 <b>3,768.50</b>
	6	1,668.30	2	1,186.00	2,854.30	45.00	138.25	-na-	138.50	224.50	53.00 <b>3,453.55</b>
	7	1,946.35	1	593.00	2,539.35	45.00	138.25	-na-	138.50	224.50	53.00 <b>3,138.60</b>

Source: UO Office of Institutional Research.

For additional information, please contact J.P. Monroe (jpmorroe@uoregon.edu ) at 541-346-2085.

UNIVERSITY OF OREGON

2022-23 Academic Year Non-Admitted Student Tuition and Required Fees - Per Term

**NONRESIDENTS**

*Combination Course Level*

Note: During the regular academic year nonadmitted students are restricted to a maximum of 8 credit hours.

Part-Time Students 1 - 8 Credit Hours	Course Level 100-499		Course Level 500 Plus		Building Fee	Inci- dental Fee	Health Service Fee	Rec Center Fee	Student Union Fee	Tech Fee	Total Tuition & Fees
	Credit Hour	Tuition	Credit Hour	Tuition							
1	1	870.17	0	0.00	870.17	45.00	138.25	-na-	138.50	224.50	53.00 <b>1,469.42</b>
	0	0.00	1	1,073.00	1,073.00	45.00	138.25	-na-	138.50	224.50	53.00 <b>1,672.25</b>
2	2	1,740.34	0	0.00	1,740.34	45.00	138.25	-na-	138.50	224.50	53.00 <b>2,339.59</b>
	0	0.00	2	2,146.00	2,146.00	45.00	138.25	-na-	138.50	224.50	53.00 <b>2,745.25</b>
	1	870.17	1	1,073.00	1,943.17	45.00	138.25	-na-	138.50	224.50	53.00 <b>2,542.42</b>
3	3	2,610.51	0	0.00	2,610.51	45.00	138.25	-na-	138.50	224.50	53.00 <b>3,209.76</b>
	0	0.00	3	3,219.00	3,219.00	45.00	138.25	-na-	138.50	224.50	53.00 <b>3,818.25</b>
	1	870.17	2	2,146.00	3,016.17	45.00	138.25	-na-	138.50	224.50	53.00 <b>3,615.42</b>
	2	1,740.34	1	1,073.00	2,813.34	45.00	138.25	-na-	138.50	224.50	53.00 <b>3,412.59</b>
4	4	3,480.68	0	0.00	3,480.68	45.00	138.25	-na-	138.50	224.50	53.00 <b>4,079.93</b>
	0	0.00	4	4,292.00	4,292.00	45.00	138.25	-na-	138.50	224.50	53.00 <b>4,891.25</b>
	1	870.17	3	3,219.00	4,089.17	45.00	138.25	-na-	138.50	224.50	53.00 <b>4,688.42</b>
	2	1,740.34	2	2,146.00	3,886.34	45.00	138.25	-na-	138.50	224.50	53.00 <b>4,485.59</b>
	3	2,610.51	1	1,073.00	3,683.51	45.00	138.25	-na-	138.50	224.50	53.00 <b>4,282.76</b>
5	5	4,350.85	0	0.00	4,350.85	45.00	138.25	-na-	138.50	224.50	53.00 <b>4,950.10</b>
	0	0.00	5	5,365.00	5,365.00	45.00	138.25	-na-	138.50	224.50	53.00 <b>5,964.25</b>
	1	870.17	4	4,292.00	5,162.17	45.00	138.25	-na-	138.50	224.50	53.00 <b>5,761.42</b>
	2	1,740.34	3	3,219.00	4,959.34	45.00	138.25	-na-	138.50	224.50	53.00 <b>5,558.59</b>
	3	2,610.51	2	2,146.00	4,756.51	45.00	138.25	-na-	138.50	224.50	53.00 <b>5,355.76</b>
	4	3,480.68	1	1,073.00	4,553.68	45.00	138.25	-na-	138.50	224.50	53.00 <b>5,152.93</b>
6	6	5,221.02	0	0.00	5,221.02	45.00	138.25	-na-	138.50	224.50	53.00 <b>5,820.27</b>
	0	0.00	6	6,438.00	6,438.00	45.00	138.25	-na-	138.50	224.50	53.00 <b>7,037.25</b>
	1	870.17	5	5,365.00	6,235.17	45.00	138.25	-na-	138.50	224.50	53.00 <b>6,834.42</b>
	2	1,740.34	4	4,292.00	6,032.34	45.00	138.25	-na-	138.50	224.50	53.00 <b>6,631.59</b>
	3	2,610.51	3	3,219.00	5,829.51	45.00	138.25	-na-	138.50	224.50	53.00 <b>6,428.76</b>
	4	3,480.68	2	2,146.00	5,626.68	45.00	138.25	-na-	138.50	224.50	53.00 <b>6,225.93</b>
	5	4,350.85	1	1,073.00	5,423.85	45.00	138.25	-na-	138.50	224.50	53.00 <b>6,023.10</b>

**UNIVERSITY OF OREGON****2022-23 Academic Year Non-Admitted Student Tuition and Required Fees - Per Term****NONRESIDENTS***Combination Course Level*

Note: During the regular academic year nonadmitted students are restricted to a maximum of 8 credit hours.

Part-Time Students 1 - 8 Credit Hours	Course Level 100-499		Course Level 500 Plus		Building Fee	Inci- dental Fee	Health Service Fee	Rec Center Fee	Student Union Fee	Tech Fee	Total Tuition & Fees
	Credit Hour	Tuition	Credit Hour	Tuition							
7	7	6,091.19	0	0.00	6,091.19	45.00	138.25	-na-	138.50	224.50	53.00 <b>6,690.44</b>
	0	0.00	7	7,511.00	7,511.00	45.00	138.25	-na-	138.50	224.50	53.00 <b>8,110.25</b>
	1	870.17	6	6,438.00	7,308.17	45.00	138.25	-na-	138.50	224.50	53.00 <b>7,907.42</b>
	2	1,740.34	5	5,365.00	7,105.34	45.00	138.25	-na-	138.50	224.50	53.00 <b>7,704.59</b>
	3	2,610.51	4	4,292.00	6,902.51	45.00	138.25	-na-	138.50	224.50	53.00 <b>7,501.76</b>
	4	3,480.68	3	3,219.00	6,699.68	45.00	138.25	-na-	138.50	224.50	53.00 <b>7,298.93</b>
	5	4,350.85	2	2,146.00	6,496.85	45.00	138.25	-na-	138.50	224.50	53.00 <b>7,096.10</b>
	6	5,221.02	1	1,073.00	6,294.02	45.00	138.25	-na-	138.50	224.50	53.00 <b>6,893.27</b>
8	8	6,961.36	0	0.00	6,961.36	45.00	138.25	-na-	138.50	224.50	53.00 <b>7,560.61</b>
	0	0.00	8	8,584.00	8,584.00	45.00	138.25	-na-	138.50	224.50	53.00 <b>9,183.25</b>
	1	870.17	7	7,511.00	8,381.17	45.00	138.25	-na-	138.50	224.50	53.00 <b>8,980.42</b>
	2	1,740.34	6	6,438.00	8,178.34	45.00	138.25	-na-	138.50	224.50	53.00 <b>8,777.59</b>
	3	2,610.51	5	5,365.00	7,975.51	45.00	138.25	-na-	138.50	224.50	53.00 <b>8,574.76</b>
	4	3,480.68	4	4,292.00	7,772.68	45.00	138.25	-na-	138.50	224.50	53.00 <b>8,371.93</b>
	5	4,350.85	3	3,219.00	7,569.85	45.00	138.25	-na-	138.50	224.50	53.00 <b>8,169.10</b>
	6	5,221.02	2	2,146.00	7,367.02	45.00	138.25	-na-	138.50	224.50	53.00 <b>7,966.27</b>
	7	6,091.19	1	1,073.00	7,164.19	45.00	138.25	-na-	138.50	224.50	53.00 <b>7,763.44</b>

Source: UO Office of Institutional Research.

For additional information, please contact J.P. Monroe (jpmonroe@uoregon.edu ) at 541-346-2085.

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UNIVERSITY OF OREGON

# **BOARD OF TRUSTEES OF THE UNIVERSITY OF OREGON**

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**POLICIES ON TUITION, MANDATORY  
ENROLLMENT FEES AND OTHER CHARGES,  
FINES, AND FEES**

**2021-22 2022-23 ACADEMIC YEAR**

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**2022-23 SUMMER SESSION**

## Contents



UNIVERSITY OF OREGON

<b>Authority</b>	1
Board of Trustees of the University of Oregon	6
<b>Tuition and Fee Policies for 2021-22</b>	7
Tuition and Mandatory Fee Structures	7
Tuition	7
Mandatory Enrollment Fees	7
Campus-based Fee Structure	8
Student Definitions	9
Tuition and Administrative Mandatory Fees for Students in a Tuition Cohort	9
Tuition and Administrative Mandatory Fees for Continuing Students	11
Tuition and Administrative Mandatory Fees for Graduate Students	11
Tuition and Administrative Mandatory Fees for Non-admitted Students	11
All Other Fees	11
<b>Scholarship and Tuition Remission Policies</b>	13
Student Financial Aid Programs	13
Diversity Programs	14
International Recruitment Programs	14
International Exchanges	14
Contract and Grant	15
University of Oregon Tuition Grant	15
Veteran Programs	15
VOYAGER Fee Remission	15
Veterans' Dependent Tuition Waiver	16
Federal Laws Requiring Resident Tuition	17
Oregon State Laws Granting Resident Tuition	18

<b>Foster Youth Tuition Waiver</b>	19
<b>Tuition Equity</b>	21
<b>Other Financial Aid Programs</b>	22
<b>Reduced Tuition Benefit for Academic and Classified Employees</b>	22
<b>Reduced Tuition Benefit for Family Members of Employees</b>	24
<b>Graduate Employees</b>	25
<b>Resident Oregon Senior Citizen Program</b>	26
<b>Auditors</b>	26
<b>University/School Partnership Co-Pay Program</b>	26
<b>Other Remission Programs</b>	28
<b>Fee Policies Specific to Summer Session</b>	28
<b>Refunds, Waivers, and Accounts Receivable Policies</b>	28
Refund Policies	28
Military Duty Refund Policy	28
Waiver of Certain Student Fees	28
Institution Authority to Adjust Charges	28
Revolving Charge Agreement	29
Interest on Overdue Accounts	29
<b>Authority</b>	6
Board of Trustees of the University of Oregon	6
<b>Tuition and Fee Policies for 2022-23</b>	7
Tuition and Mandatory Fee Structures	7
Tuition	7
Mandatory Enrollment Fees	7
Campus-based Fee Structure	8
Student Definitions	9
Tuition and Administrative Mandatory Fees for Students in a Tuition Cohort	9
Tuition and Administrative Mandatory Fees for Continuing Students	11
Tuition and Administrative Mandatory Fees for Graduate Students	11

<u>Tuition and Administrative Mandatory Fees for Non-admitted Students.....</u>	11
<u>All Other Fees.....</u>	11
<b><u>Scholarship and Tuition Remission Policies.....</u></b>	<b>13</b>
<u>Student Financial Aid Programs .....</u>	13
<u>Diversity Programs .....</u>	14
<u>International Recruitment Programs .....</u>	14
<u>International Exchanges.....</u>	14
<u>Contract and Grant .....</u>	15
<u>University of Oregon Tuition Grant .....</u>	15
<u>Veteran Programs .....</u>	15
<u>VOYAGER Fee Remission.....</u>	15
<u>Veterans' Dependent Tuition Waiver .....</u>	16
<u>Federal Laws Requiring Resident Tuition.....</u>	17
<u>Oregon State Laws Granting Resident Tuition.....</u>	18
<u>Foster Youth Tuition Waiver .....</u>	19
<u>Tuition Equity .....</u>	21
<u>Other Financial Aid Programs .....</u>	22
<b><u>Reduced Tuition Benefit for Academic and Classified Employees .....</u></b>	<b>22</b>
<b><u>Reduced Tuition Benefit for Family Members of Employees.....</u></b>	<b>24</b>
<b><u>Graduate Employees .....</u></b>	<b>25</b>
<b><u>Resident Oregon Senior Citizen Program .....</u></b>	<b>26</b>
<b><u>Auditors .....</u></b>	<b>26</b>
<b><u>University/School Partnership Co-Pay Program.....</u></b>	<b>26</b>
<b><u>Other Remission Programs .....</u></b>	<b>28</b>
<b><u>Fee Policies Specific to Summer Session .....</u></b>	<b>28</b>
<b><u>Refunds, Waivers, and Accounts Receivable Policies .....</u></b>	<b>28</b>
<u>Refund Policies.....</u>	28
<u>Military Duty Refund Policy .....</u>	28
<u>Waiver of Certain Student Fees .....</u>	28
<u>Institution Authority to Adjust Charges.....</u>	28

<u>Revolving Charge Agreement</u> .....	29
<u>Interest on Overdue Accounts</u> .....	29

## AUTHORITY

### Board of Trustees of the University of Oregon

Under ORS 352.102, the Board of Trustees (“Trustees” or “Board”) of the University of Oregon (“University” or “UO”) may authorize, establish, eliminate, collect, manage, use in any manner and expend all revenue derived from tuition and mandatory enrollment fees.

Under ORS 352.105, the Board will also collect mandatory Incidental Fees upon the request of the Associated Students of the University of Oregon (“ASUO”) under a process established by the ASUO in consultation with the Trustees. Mandatory Incidental Fees collected by the Board will be allocated by the recognized student government. The mandatory Incidental Fee proposed by the ASUO, uses of the fee, or decision to modify an existing fee may be refused by the Board or the University President (“President”) if one determines that:

- The recognized student government assessed or allocated the mandatory incidental fees in violation of applicable local, state, or federal law;
- The allocation conflicts with a preexisting contractual financial commitment;
- The total mandatory incidental fees budget is an increase of more than five percent over the level of the previous year; or
- The fee request is not advantageous to the cultural or physical development of students.

Under ORS 352.087(1)(d), the Board may establish, collect and use charges, fines and fees for services, facilities, operations and programs. This provision does not cover tuition and mandatory enrollment fees or incidental fees, but does cover every other charge, fine, or fee that could be established.

Tuition for students enrolled in a program is established based on state-appropriated funds per full-time equivalent student, the financial needs of the University, market comparators, student classification (including, but not limited to, undergraduate, graduate, and doctoral), residency, credit hours taken, degree program, and other factors. In determining tuition for undergraduate students who are enrolled in a degree program and are qualified to pay resident tuition:

- (1) The Board may not increase the total of tuition and mandatory enrollment fees by more than five percent annually unless the Board first receives approval from:
  - a) The Higher Education Coordinating Commission; or
  - b) The Legislative Assembly.
- (2) The Board shall attempt to limit annual increases in tuition and mandatory enrollment fees for undergraduate students who are enrolled in a degree program and have established residency in Oregon to a percentage that is not greater than the percentage increase in the Higher Education Price Index, as compiled by the Commonfund Institute.

The Board may not delegate authority to determine tuition for undergraduate students who are enrolled in a degree program and are qualified to pay tuition. Revenues derived from tuition may be managed and used in any manner.

Tuition may be established for any University program and may vary by term.

A fee is a mandatory enrollment fee if it is required to be paid as a condition of enrollment in the University by every enrolled student.

The Board may not delegate authority to determine mandatory enrollment fees for undergraduate students who are enrolled in a degree program and are qualified to pay tuition. The University has the option of assessing mandatory enrollment fees during the summer session at rates comparable to those assessed in the academic year.

## TUITION AND FEE POLICIES FOR ~~2021-22~~2022-23

### Tuition and Mandatory Fee Structures

As of summer 2020, the University of Oregon will transition from a standard undergraduate tuition and fee structure to a Guaranteed Tuition Program under which students will know the cost of their education for at least 5 years. Both tuition and mandatory enrollment fees (other than the Incidental Fee) will be included in the guaranteed structure. The Guaranteed Tuition Program is mandatory.

#### Tuition

Some UO coursework is designated as self-support or study abroad. These courses have their own tuition structure designed to cover the direct and indirect cost of the course. Specific tuition for self-support courses and study abroad programs is not covered by this document and such courses are not part of the tuition structures described here.

Tuition is assessed based on the student's residency classification, level (undergraduate/graduate) and major, regardless of course level, with exceptions for students enrolled in joint baccalaureate/graduate programs where tuition is assessed by course level rather than student level. Going forward, tuition will also be based on *tuition cohort* (see below).

#### Mandatory Enrollment Fees

Mandatory Enrollment Fees consist of the following:

- **Building Fee:** The Building Fee is used to fund the construction and provide debt service for capital projects, primarily those associated with student centers, health centers, and recreational facilities.

- **Health Service Fee:** The Health Service Fee is used to support student health and counseling services. Students enrolled in UO Portland programs use the Portland State University (“PSU”) Student Health Center and pay the same Health Service Fee as PSU students.
- **Recreation Center Fee:** The Recreation Center Fee is used to fund the construction, debt service, maintenance, and operation costs of the student recreation center.
- **Student Union Fee:** The Student Union Fee is used to fund the construction, debt service, maintenance, and operation costs of the student union.
- **Technology Fee:** The Technology Fee helps the University make important investments to maintain and improve the core infrastructure our technology relies on, and to stay abreast of rapidly changing technological advances.
- **Incidental Fee:** The Incidental Fee supports activities that provide for the social, cultural, educational and physical development of students. Incidental Fee recommendations for Academic Year 2021-222022-23 were approved by student committees and forwarded to the President for endorsement in accordance with UO Policy III.03.03.

**The first five of these fees are herein referenced as the administrative mandatory fee set. The incidental fee is not part of this set.**

### Campus-based Fee Structure

Students enrolled in Eugene campus courses are required to pay all mandatory fees. Students enrolled at the Portland or Charleston campuses, or at an off-campus site, do not pay Recreation Center or Student Union fees, and they pay 50% of the Incidental Fee. Students in a Portland program are required to pay Portland State University’s Health Service Fee and students at the Charleston campus pay UO’s Health Service Fee. Students at an off-campus site do not pay the Health Service Fee. For the purpose of assessing fees, students enrolled in only online courses pay the Off-Campus set of fees. Non-admitted students do not pay the Health-Service Fee.

Campus-based Fee Structure	<u>2021-22</u> <u>2022-23</u> Academic Year			
	Eugene Campus	Portland Campus	Charleston Campus	Off-campus Site
Building Fee	✓	✓	✓	✓
Health Service Fee	✓	✓ (PSU Health Service Fee)	✓	
Recreation Center Fee	✓			
Student Union Fee	✓			
Technology Fee	✓	✓	✓	✓
Incidental Fee	✓	✓ (50% of I-fee)	✓ (50% of I-fee)	✓ (50% of I-fee)

## Student Definitions

**Tuition Cohort or Tuition Cohort Student.** For the purpose of this fee book, a tuition cohort is the collection of undergraduate students who matriculated and first enrolled as undergraduates during any of the four terms beginning with the summer of the referenced year. For example, tuition cohort 2020 is comprised of those students who matriculated and first enrolled during summer 2020, fall 2020, winter 2021, or spring 2021. Tuition cohort 2020 is the first official tuition cohort. Students who matriculated and enrolled prior to summer 2020 are not members of any tuition cohort.

**Continuing Student.** For the purpose of this fee book, a continuing student is any undergraduate student who initially matriculated and enrolled prior to summer term 2020.

**Graduate Student.** For the purpose of this fee book, a graduate student is any student accepted and currently enrolled in a graduate program.

**Non-admitted Undergraduate Student.** A student who is not admitted to the university and does not hold an accredited baccalaureate degree.

**Non-admitted Graduate Student.** A student who is not admitted to the university and holds an accredited baccalaureate degree.

**Non-Graduate Post-Baccalaureate Student.** A holder of an accredited baccalaureate degree who has not been admitted to a graduate degree program and who is admitted to pursue a second baccalaureate degree or enroll in course work not to be used for credit toward a graduate degree is called a non-graduate post-baccalaureate student. Such students may be continuing students, tuition cohort students, or non-admitted students as outlined above and their tuition and administrative mandatory fees will be assessed accordingly.

**Graduate Post-Baccalaureate Student.** A holder of an accredited baccalaureate degree who is not admitted to a graduate program but wishes to pursue credit towards a graduate degree or graduate certificate program is called a graduate post-baccalaureate student. Graduate post-baccalaureate students are considered graduate students.

**Student Residency.** A resident student is one who fulfills requirements established by the Inter-Institutional Residency Compact between and among the seven public universities in Oregon. Graduate students who have a teaching, research, or administrative Graduate Employee position, or are supported by an eligible training grant or graduate fellowship, are assessed at resident tuition and fee rates.

## Tuition and Administrative Mandatory Fees for Students in a Tuition Cohort

For students in a tuition cohort, the institution guarantees tuition and total administrative mandatory fees will be the same for the five-year period that extends from the summer term that begins the definition of the cohort and ends with spring term, 20 terms later (see table below). Tuition charged during the regular academic year will be locked for the five-year period. Tuition charged during the five-

year period for summer term will also be locked, however, the summer tuition rates will be locked at a set discount from academic year rates. Similarly, rates for each administrative mandatory fee will be locked for the five-year period. The schedule of which administrative mandatory fees are assessed to a student each term, will vary, based on whether a student is studying on the Eugene campus or another location. Students studying in Portland have access to Portland State University's (PSU's) Health Service and are assessed the PSU Health Service fee instead of the UO Health Service Fee. The PSU Health Service Fee rates are not locked for the five-year period and will vary each year based on the specific rate structure set by Portland State University. Differential tuition is included in this guaranteed tuition structure. Laboratory and course fees are not included in the guaranteed tuition structure.

For each additional year a student in the tuition cohort remains enrolled beyond the five-year guarantee, tuition and administrative mandatory fees will revert to the tuition and fee levels of the next tuition cohort.

TUITION COHORTS	Student Initial Enrollment				Final Term of Guarantee
2020 Tuition Cohort	Summer 2020	Fall 2020	Winter 2021	Spring 2021	<b>Spring 2025</b>
2021 Tuition Cohort	Summer 2021	Fall 2021	Winter 2022	Spring 2022	<b>Spring 2026</b>
2022 Tuition Cohort	Summer 2022	Fall 2022	Winter 2023	Spring 2023	<b>Spring 2027</b>

For example, new students who enroll in summer of 2020, fall 2020, winter 2021, or spring 2021 are part of the 2020 tuition cohort. **The five-year tuition and administrative mandatory fee guarantee for these students expires at the end of spring term of the tuition cohort's fifth year, spring 2025.**

To continue the example, if a student in the 2020 tuition cohort remains enrolled as an undergraduate in fall 2025 they will be assessed the same tuition and administrative mandatory fees as the 2021 tuition cohort. If they remain enrolled in fall 2026 they will be assessed the same tuition and fees as the 2022 tuition cohort, and so on.

Summer term tuition for the 2020 tuition cohort will be 85% of academic year tuition for residents and 65% of regular academic year tuition for non-residents.

The fixed tuition and administrative mandatory fee guarantee for a tuition cohort is for five years with the following exceptions:

**Withdrawal from the University for U.S. Military or Other U.S. National Defense Services.**

Students who are called to active duty in the United States military as a result of national emergency or as a result of the mobilization of the reserve forces, including the National Guard, and re-enroll at the University within one year after the completion of their active military service will be entitled to resume their five-year guarantee for the amount of time remaining in their guarantee at the time of their military withdrawal. The student must submit a petition to initiate the extension.

**Extraordinary Circumstances.** Students who believe the circumstances of their situation merit an extension may appeal to the Office of the Registrar. Because the fixed-tuition guarantee is for five years, non-military exceptions will rarely be granted.

As long as a student from a tuition cohort is an undergraduate or non-graduate post-baccalaureate student, they remain in their tuition cohort. Students from a tuition cohort who are accepted to and enroll in a graduate program are no longer in their tuition cohort and will pay graduate tuition as described below.

### **Tuition and Administrative Mandatory Fees for Continuing Students**

Total tuition and administrative mandatory fees for continuing students will increase by a fixed percentage in each of the next four years, beginning with fall 2020. After spring 2024, any continuing students who continue to be enrolled as undergraduates will be added to the 2020 tuition cohort.

Summer session tuition for continuing students will be 85% of the previous academic year tuition for residents and 65% of regular academic year tuition for non-residents.

### **Tuition and Administrative Mandatory Fees for Graduate Students**

Tuition for graduate programs is determined program by program. All graduate students will pay a set of published administrative mandatory fees.

### **Tuition and Administrative Mandatory Fees for Non-admitted Students**

Non-admitted students are always charged tuition and administrative mandatory fees at the most recent undergraduate tuition cohort rate for undergraduate level courses (100-499) and current graduate rates for graduate level courses (500+).

## **All Other Fees**

Other fees include all charges, fines, and fees that are neither tuition nor mandatory enrollment fees. The Board, the President, or designee may establish these fees and use them for services, facilities, operations, and programs.

- **Matriculation Fee:** The Matriculation Fee is a one-time fee charged to newly admitted students upon enrollment. This one-time assessment was developed to reduce the large number of enrollment-related fees. The fees are also used to support academic programming for Freshman Interest Groups and other learning communities.
- **Differential Tuition:** Schools and colleges may charge tuition by course or program when special circumstances exist. These circumstances may include, but are not limited to, an extraordinary cost of offering the course or academic program (e.g., need for specialized equipment and supplies; accreditation standards; delivery methods). Setting tuition by program assigns a per-credit price for all the core courses in an academic program, whether or not the student is degree-seeking within that program. Differential course and program tuition rates are reviewed by the Tuition and Fee Advisory Board (TFAB) and approved by the Board as part of the fee-setting process.

- **Undergraduate International Student Fee:** The University sets the Undergraduate International Student Fee to provide a set of services and programming to support international students, including students enrolled in the American English Institute (“AEI”) program. The fee supports services related to academic support; enrollment services; increased immigration compliance and reporting as required by the federal government (such as SEVIS II); personal and cultural counseling and advising; and accelerated planning and delivery of new programs.
- **Laboratory and Course Fees:** Generally, laboratory and course fees are limited to fees for equipment, materials, field trips, or ancillary services consumed by the student as a part of course instruction where the equipment or material is not readily available for purchase through a private source. Fees can also cover one-on-one or small group physical education, music and dance instruction. Laboratory and course fees must be published. [For further information  
https://brp.uoregon.edu/content/Fee-Guidelines](https://brp.uoregon.edu/content/Fee-Guidelines).
- **Online Course Fee:** All online courses have an additional per-credit fee which gives students access to a suite of services, including a chat/call center for expedited assistance, extended help desk hours for technical support, and exam proctoring services.
- **Other Charges, Fees, and Fines for Services, Facilities, Operations, and Programs:** The level of charges, fees, and fines should be at least sufficient to ensure recovery of associated direct and indirect costs. Some charges, fees, and fines may be established at a level to deter conduct that is contrary to University policies and standards or applicable law. Charges, fees, and fines are for purposes such as the following: auxiliary services such as housing, food services, and parking; use of facilities; athletics and other tickets and events; and violation of policies and standards, such as late fines for library books and parking fines. These charges, fees, and fines are reviewed, updated, and published annually through a process administered by the Office of Budget and Resource Planning (BRP) office. In extraordinary situations, the University can alter existing fees or propose new fees outside of the annual approval process, via an interim review process. Certain charges, fees or fee schedules are adopted without following the BRP process. They include things such as charges relating to symposiums, conferences, short courses, food, books or other retail goods, prices of admission to athletic, entertainment or cultural events or advertising rates in student or institutional publications. [For further information  
https://brp.uoregon.edu/content/Fee-Guidelines](https://brp.uoregon.edu/content/Fee-Guidelines).
- **Application Fees:** The President or designee determines application fees. The University may assess greater application fees for admission to selected programs or schools. The relevant application fee must be received before the application will be evaluated. Application fees are not refundable.

**Undergraduate Application Fee Waiver:** The President or designee may, upon request, waive the application fee for first-time freshmen or transfer students who, at the time of application, demonstrate high financial need, as evidenced by:

- Participation in a free or reduced school lunch program;
- Pell-eligible status provided on FAFSA-related documents;

- Involvement in TRIO-type college preparatory programs (e.g., Upward Bound, Talent Search, EOC, HEP);
- State of Oregon or U.S. public assistance;
- Submission of a College Board, NACAC, or Foster Youth Tuition and Fee waiver; or
- Other factors illustrating financial hardship, at the discretion of the Office of Admissions.

No applicant will be granted a fee waiver unless they are determined to have genuine financial need. Prospective students who are classified as international applicants are not eligible for an application fee waiver. However, undocumented Oregon high school students who are potentially eligible for the state's Tuition Equity Program can be granted a waiver on a case-by-case basis. The Office of Admissions administers the application fee waiver program, and its Director may add, remove, or modify methods of confirmation as needed over time.

To request an application for Application Fee waiver, go to:

<http://admissions.uoregon.edu/counselors/feedeferral>. The student must complete the form and, as appropriate, obtain needed signatures to confirm her/his status.

**Graduate Application Fee Waiver:** A limited number of waivers of the graduate application fee are available for graduate applicants who are:

- An admitted graduate student or an applicant that has already paid the UO graduate admission application fee for the same academic year;
- An employee eligible for staff tuition rates;
- A participant in an undergraduate research program for minority students;
- A participant in a service-based organization such as the Peace Corps;
- An active member, reservist, or veteran of the U.S. armed services;
- Eligible for a waiver based on financial need.

The Graduate School administers the graduate application fee waiver program. Applicants may request a waiver as part of the online application for Graduate School admission.

## SCHOLARSHIP AND TUITION REMISSION POLICIES

The University's commitment to the 40-40-20 goal described in ORS 350.014 is achieved through an array of scholarship and financial aid programs and policies. These programs and policies promote the University's goals of providing accessibility to high-quality higher education.

### Student Financial Aid Programs

The combined aid for a student may not exceed the cost of attendance for that student, except as approved by the President or designee. The University's student financial aid offerings are comprised of programs like others offered across the country (often referred to as "fee waivers" or "tuition discounts") enhanced by initiatives specific to the University or the state of Oregon. As an enrollment management tool, programmatic student aid allows the University to target specific campus enrollment

goals including recruitment of needy or meritorious students, international students, athletes, and other student populations. The following are summaries of University student financial aid programs:

## Diversity Programs

- **University of Oregon Diversity Initiatives**
  - *Criteria:* These initiatives are open to all admitted students, resident or nonresident, undergraduate, graduate, or law. The programs may consider different factors in making awards and may offer financial aid programs that support the University's commitment to diversity and supports its educational mission.
  - *Awards:* The University may make partial or full scholarships based on financial need, or to expand the number of students who receive at least some funding support. Awards are specific to the University of Oregon, and students may not take a scholarship with them if they move to another institution.

## International Recruitment Programs

- **International Fee Remission Program**
  - *Criteria:* This program is for admitted undergraduate or graduate students with international student status.
  - *Awards:* Awards may vary in amount but cannot exceed the total amount of the International Student Services Fee. The University has the option to remit all or a portion of this fee.
- **Cultural Service Program**
  - *Criteria:* This program is for admitted undergraduate or graduate students with international student status who are competitively selected based on academically meritorious achievement, and who fulfill the community service requirements of the program while receiving the award.
  - *Awards:* Awards may vary in amount but cannot exceed the total nonresident undergraduate or graduate tuition and mandatory enrollment fees. Remission of mandatory enrollment fees is at the University's option.

## International Exchanges

- **IE3 Global Programs**
  - *Criteria:* This program is for students who are attending University of Oregon as a part of an exchange program managed by IE3 Global and approved by the University of Oregon.

- *Awards:* Awards may consist of remission of all or some of the Enrollment Fees, depending upon the reciprocal agreement under which the student is enrolled.

## Contract and Grant

- **Contract and Grant: Academic Year**
  - *Criteria:* This provision is for students who participate in specific courses or programs during the academic year funded by grant or contract with an outside agency or firm.
  - *Awards:* Awards are generally for remission of tuition only, depending upon agreement with the granting agency
- **Contract and Grant: Summer Session**
  - *Criteria:* This provision is for students who participate in specific courses or programs during the summer session funded by grant or contract with an outside agency or firm.
  - *Awards:* Awards are generally for remission of tuition only, depending upon agreement with the granting agency.

## University of Oregon Tuition Grant

- *Criteria:* The University of Oregon Tuition Grant is a need-based tuition grant program available to qualified Oregon resident undergraduates.
- *Awards:* These supplemental tuition grants may not exceed the total tuition assessed for the regular academic year.

## Veteran Programs

### VOYAGER Fee Remission

The Voyager Tuition Assistance Program (“VOYAGER”) was implemented in the fall of 2005 in response to a direct gubernatorial request and is intended for National Guard or Reservists who have been in an active duty capacity in a combat zone on or after 9/11/2001.

- *Criteria:* The VOYAGER fee remissions are for Oregon residents who are members of the National Guard or Reserves and were deployed in an area of military combat since September 11, 2001. This fee remission is for full-time students pursuing their initial bachelor’s degree. Students must submit a Free Application for Federal Student Aid (“FAFSA”) annually and continue to maintain satisfactory academic progress to maintain eligibility.
- *Awards:* Award is the difference between the National Guard and Reserves tuition benefit of \$4,500 or the VA Chapter 33 Tuition Fee benefit and total enrollment fees. Students are

responsible for securing the National Guard or Reserves tuition benefit. Duration of the VOYAGER award is four years excepting those five-year degree programs as documented in the University catalog. Students are not eligible for the award once they earn fifteen credits beyond the minimum number of credits required by the degree.

### **Veterans' Dependent Tuition Waiver**

- *Criteria:* The Veterans' Dependent tuition waiver is for qualified students admitted to a first-time baccalaureate or master's degree program. A qualified student is a child (includes adopted child or stepchild), spouse, or a surviving spouse who has not remarried, of a service member or a child of a Purple Heart recipient.
  - The service member is one who:
    - Died on active duty;
    - Has a 100% service-connected disability rating as certified by the United States Department of Veterans Affairs or by any branch of the Armed Forces of the United States; or
    - Died as a result of a military service-connected disability.
  - The Purple Heart recipient is a person, alive or deceased, who:
    - Was relieved or discharged from service in the Armed Forces of the United States with either an honorable discharge or a general discharge under honorable conditions; and
    - Was awarded the Purple Heart in 2001 or thereafter for wounds received in combat.
- An eligible child must be 23 years of age or younger at the time the child applies for the waiver. A child who is older than 23 years of age is eligible for a waiver for a master's degree program if the child:
  - Applied for and received a waiver for a baccalaureate degree when the child was 23 years of age or younger; and
  - Applied for a master's program waiver within 12 months of receiving a baccalaureate degree.

The qualifying student must meet Oregon residency requirements.

- *Awards:* The award does not cover other mandatory enrollment and course specific fees. The maximum waiver granted under this remission program shall be:
  - The total number of attempted credit hours equal to four years of full-time attendance for a baccalaureate degree; and
  - The total number of attempted credit hours equal to two years of full-time attendance for a master's degree.
- Notwithstanding sections 1 and 2 of this paragraph, a waiver may not exceed the total number of credit hours the qualified student needs to graduate with a baccalaureate or a

master's degree. Transferred credit hours accepted for a degree program may or may not count toward the total credit hours needed for degree completion.

1. The amount of tuition waived may be reduced by the amount of any federal aid scholarships or grants, awards from the Oregon Opportunity Grant program established under ORS 348.205, or any other aid from the eligible post-secondary institution, received by the qualified student.
2. The amount of tuition waived may not be reduced by the amount of any Survivors' and Dependents' Educational Assistance under 38 U.S.C. Chapter 35 paid to a qualified student.
3. Awards to children of Purple Heart recipients apply only to students admitted as new but not continuing for fall 2013 or thereafter.
4. Please, visit the University of Oregon webpage at <https://brp.uoregon.edu/content/Tuition-and-Fees> for additional program information and application process.

### **Federal Laws Requiring Resident Tuition**

Section 702 of the Veterans Access, Choice, and Accountability Act of 2014 [effective July 1, 2015] was codified in 38 U.S.C. 3679(c). In 2016 Congress passed Public Law 114-315 [effective July 1, 2017], which modified 38 U.S.C. 3679(c). In 2018 Congress passed Public Law 115-251 [effective April 1, 2019 at UO], which further amended 38 U.S.C. 3679(c). The following policy includes the provisions of 38 U.S.C. 3679(c), as amended.

The following individuals shall be charged the in-state rate, or otherwise considered a resident, for tuition and fees purposes:

- A Veteran using educational assistance under either Chapter 30 (Montgomery G.I. Bill® – Active Duty Program) or Chapter 33 (Post-9/11 G.I. Bill®), of title 38, United States Code, who lives in the state of Oregon while attending the University of Oregon (regardless of his/her formal state of residence) and enrolls at the University of Oregon within three years of discharge or release from a period of active duty service of 90 days or more.
- Anyone using transferred Post-9/11 GI Bill benefits (38 U.S.C. § 3319) who lives in the state of Oregon while attending the University of Oregon (regardless of his/her formal state of residence) and enrolls at the University of Oregon within three years of the transferor's discharge or release from a period of active duty service of 90 days or more.
- Anyone described above while he or she remains continuously enrolled (other than during regularly scheduled breaks between courses, semesters, or terms) at the University of Oregon. The person so described must have enrolled at the University of Oregon prior to the expiration of the three year period following discharge or

release as described above and must be using educational benefits under either Chapter 30 or Chapter 33, of title 38, United States Code.

- Anyone using benefits under the Marine Gunnery Sergeant John David Fry Scholarship (38 U.S.C. § 3311(b)(9)) who lives in the state of Oregon while attending the University of Oregon (regardless of his/her formal state of residence).
- Anyone using transferred Post-9/11 GI Bill benefits (38 U.S.C. § 3319) who lives in the state of Oregon while attending the University of Oregon (regardless of his/her formal state of residence) and the transferor is a member of the uniformed service who is serving on active duty.
- Anyone using educational assistance under Chapter 31, Vocational Rehabilitation and Employment (VR&E), who lives in the state of Oregon while attending the University of Oregon (regardless of his/her formal state of residence).
- The GI Bill® is a registered trademark of the U.S. Department of Veterans Affairs (VA). More information about education benefits offered by the VA is available at the official.

#### **Oregon State Laws Granting Resident Tuition**

The following outlines the provisions of ORS 350.290 from the original House Bill 2158 and as amended by House Bills 4021, 2670, and 4019 as they pertain to University of Oregon tuition and fee charges for certain veterans and dependents.

The University of Oregon shall charge an enrolled student who is not a resident of this state and who is attending classes as an undergraduate or graduate student (but not students pursuing a second bachelors, second masters, or second doctoral degree) tuition and fees no greater than the resident rate if the student:

1.
  - (a) Served in the Armed Forces of the United States;
  - (b) Was relieved or discharged from that service with either an honorable discharge or a general discharge under honorable conditions; and
  - (c) Provides proof that the student has established a physical presence in Oregon within 12 months of being enrolled at the University of Oregon;
2. Was, or is the dependent of, a resident of Oregon who left the state within the previous five years in order to serve, and who subsequently served, in the Armed Forces of the United States; or
3. Was, or is the dependent of, a resident of Oregon who left the state more than five years ago in order to serve, and who subsequently served, in the Armed Forces of the United States; and since leaving the state, has never established residence in another state.

A student who served in the Armed Forces of the United States and who receives federal tuition benefits in excess of the tuition and fees the person is charged under this policy shall pay tuition and fees equal to the federal tuition benefits received.

Distance education and self-support courses are exempt from the tuition reduction provisions of this policy.

If a nonresident student otherwise eligible for tuition benefits under this policy is receiving federal vocational rehabilitation education benefits, that student shall pay full nonresident tuition and fees charged by the University of Oregon.

An eligible student should submit a copy of his/her DD214 to the University of Oregon Office of Veterans Affairs in 244 Oregon Hall. Additional documentation may be required.

## Foster Youth Tuition Waiver

The Foster Youth Tuition and Fee Waiver originated with the passage of HB 3471 in the 2011 Regular Session of the Oregon Legislative Assembly and is intended to “increase access to higher education for current and former foster children by providing a Tuition and Fee Waiver” to minimize the amount of tuition absorbed by the student. It was further amended by HB 2095 in the 2013 Regular Session to align the definition of “former foster youth” with the federal standard.

- *Criteria:* The Foster Youth Tuition and Fee Waiver is open to qualified current and former foster children enrolled as undergraduate students within the University for the purposes of pursuing an initial undergraduate degree (as evidenced by admission into an undergraduate degree program). This program waives tuition and fees for current and former foster youth who enroll prior to reaching 25 years of age until the student receives “the equivalent of four years of undergraduate education.”
- To qualify for the program, the student must:
  - Have spent at least 180 days in substitute care after age 14, was not dismissed from care prior to reaching 16 years of age, and either left foster care (had wardship terminated) or completed high school/GED within the previous 3 years; and
  - Be admitted to an undergraduate degree program and enroll prior to reaching 25 years of age; and
  - Submit a completed FAFSA for each academic year they are eligible for the program; and
  - ~~For years after the first academic year at the University, have completed a minimum of 30 volunteer service hours in the previous academic year performing community service activities such as mentoring foster youth or assisting in the provision of peer support service activities, according to policies developed by the institution of higher education at which the current or former foster child is enrolled.~~
  - Service hours are no longer required
- *Awards:*
  1. A qualified student for the Foster Youth Tuition and Fee Waiver is entitled to waiver of tuition and fees as noted below:

- a. Tuition for academic credit courses (at base or differential rates depending upon program to which student is admitted) but not for noncredit courses.
- b. Mandatory enrollment fees.
- c. Fees required for instruction-related services such as lab or course fees that are assessed upon registration for a course.
- d. The waiver excludes all other charges, fees, and fines such as residence hall room and board, dining services, parking fees and fines, library fines, etc. In addition, textbooks and other course materials not assessed as part of a course fee are also excluded. Fees considered as "pass through" fees (i.e., paid to an outside provider) are exempt from the Tuition and Fee Waiver.

2. Eligible students may receive the Foster Youth Tuition and Fee Waiver for up to 12 terms of full-time study or the equivalent. Attendance at less than full-time will be prorated accordingly.
3. If a student meets all other criteria for eligibility but does not require the Foster Youth Tuition and Fee Waiver, the student shall remain eligible until the student receives the equivalent of 4 years of undergraduate education.
4. As noted previously, to be considered eligible for this program, the student must complete and submit a FAFSA for each academic year they are eligible for the program. Awards made under the Foster Youth Tuition and Fee Waiver shall be applied after the following:
  - a. Any federal Pell or Supplemental Educational Opportunity Grants (SEOG)
  - b. Oregon Opportunity Grant established under ORS 384.205
  - c. Any other gift, grant, or scholarship received from the University which may be applied to the tuition and fees covered under this program.
5. For purposes of this program, non-tuition scholarships from sources outside of the University, which pass through either OSAC or the institution, are not included in the calculation of the tuition and fee waiver award amount.

***Definition of Terms:*** For purposes of this waiver, the following terms are defined as follows: A "former foster child" is defined as an individual who, for a total of six or more months while between 14 and 21 years of age, was:

- A ward of the court pursuant to ORS 419B.100(1)(b) to (e) and in the legal custody of the Oregon Department of Human Services (or one of the nine federally recognized Tribes in Oregon) for out-of-home placement and not dismissed from care before reaching 16 years of age; or
- An Indian child subject to the Indian Child Welfare Act (25 U.S.C. 1901 et seq.), under the jurisdiction of a tribal court for out-of-home placement and not dismissed from care before reaching 16 years of age.

Please, visit the University of Oregon webpage at <https://brp.uoregon.edu/content/Tuition-and-Fees> for additional program information and application process.

## Tuition Equity

The 2013 Oregon Legislature passed the Tuition Equity Act. The Tuition Equity Act, as outlined in House Bill 2787 (2013), became law on April 2, 2013, and exempts the following students from paying nonresident tuition and fees for enrollment in Oregon's public universities:

1. Students who are not citizens or lawful permanent residents of the United States provided the student:
  - a. During each of the three years immediately prior to receiving a high school diploma or leaving school before receiving a high school diploma, attended an elementary or a secondary school in Oregon;
  - b. During each of the five years immediately prior to receiving a high school diploma or leaving school before receiving a high school diploma, attended an elementary or a secondary school in any state or territory of the United States, the District of Columbia, or the Commonwealth of Puerto Rico;
  - c. No more than three years before initially enrolling in an Oregon public university, received a high school diploma from a high school in this state or received the equivalent of a high school diploma (such as a GED); and
  - d. Shows intention to become a citizen or a lawful permanent resident of the United States by submitting to the University:
    - An official copy of the student's application to register with a federal immigration program or federal deportation deferral program, or a statement of intent that the student will seek to obtain citizenship as permitted under federal law; and
    - An affidavit stating that the student has applied for a federal individual taxpayer identification number or other official federal identification document.
2. Students who are financially dependent upon a person who is not a citizen or a lawful permanent resident of the United States if the student:
  - a. During each of the three years immediately prior to receiving a high school diploma or leaving school before receiving a high school diploma, attended an elementary or a secondary school in this state and resided in this state with the person upon whom the student is dependent;
  - b. During each of the five years immediately prior to receiving a high school diploma or leaving school before receiving a high school diploma, attended an elementary or a secondary school in any state or territory of the United States, the District of Columbia, or the Commonwealth of Puerto Rico and resided with the person upon whom the student is dependent;
  - c. No more than three years before initially enrolling in an Oregon public university, received a high school diploma from a secondary school in this state or received the equivalent of a high school diploma.
3. For a student who is not already a citizen or lawful permanent resident of the United States, shows intention to become a citizen or a lawful permanent resident of the United States by submitting to the public university the student attends or plans to attend:

- a. An official copy of the student's application to register with a federal immigration program or federal deportation deferral program, or a statement of intent that the student will seek to obtain citizenship as permitted under federal law; and
- b. An affidavit stating that the student has applied for a federal individual taxpayer identification number or other official federal identification document.

A student will continue to qualify for exemption from nonresident tuition and fees (e.g., be able to pay in-state tuition rates) under subsection (1) or (2) above for five years after initial enrollment.

A student who is a citizen or a lawful permanent resident of the United States and who has resided outside of Oregon for more than three years while serving in the Armed Forces of the United States, but who otherwise meets the requirements of subsection (1) or (2) above, shall qualify for exemption from nonresident tuition and fees for enrollment in a public university listed in ORS 352.002 without having to reestablish residency in Oregon.

Please, visit the University of Oregon webpage at <https://brp.uoregon.edu/content/Tuition-and-Fees> for additional program information and application process.

## Other Financial Aid Programs

The University may create other individual financial aid programs to address enrollment management and financial aid program needs.

- *Criteria:* The University of Oregon scholarship programs are merit and/or need-based awards that support the mission and goals of the University. These scholarships assist in the recruitment and retention of students.
- *Awards:* Scholarship amounts and eligibility criteria may vary across programs, and across academic years. These programs will be reviewed periodically to ensure that they continue to support the University's enrollment goals. Both resident and nonresident undergraduates will be eligible to receive funds under this program, with award amounts differing due to the difference in tuition for these groups of students. For programs where need is a consideration, use of the FAFSA or ORSAA data will also be considered in determining award eligibility.

## REDUCED TUITION BENEFIT FOR ACADEMIC AND CLASSIFIED EMPLOYEES

This benefit is also known as the "staff rate" privilege.

*Rates:* The family/staff rate for employees is 30% of resident undergraduate tuition and this rate applies to only the first 12 credits per term. For undergraduate students, the rate is applied to the tuition table attached to their tuition status (tuition cohort, continuing student or non-admitted student). For a graduate student, the rate is applied to the most recent (undergraduate) tuition cohort tuition table. Above 12 credits, the student is assessed at the full "each additional credit" published on the tuition table attached to their tuition status (tuition cohort, continuing, graduate, non-admitted). Differential

tuition is exempt from the family/staff rate. Under this benefit, there is no tuition plateau for employees using the staff rate for graduate courses; there is no tuition plateau at any campus for employees, family and dependents, or retired staff.

**Fees:** Charges for mandatory enrollment fees do not apply for employees using the benefit; nor are employees entitled to health services or incidental fee services through this program. No Application Fee is required for employees and no other deposit is required when registering for classes. Other fees such as lab or course fees are assessed at the full rate and no discount is provided.

**Employee Eligibility:** On approval of the president or designee and with the concurrence of the employee's immediate supervisor, employees appointed at half-time (.5 FTE) or more are eligible. To qualify for this fee, the employee must meet these eligibility criteria no later than the first day of classes of the term of enrollment.

For purposes of this benefit, the term "employee" may include persons with full-time courtesy appointments who provide a benefit to the University in the form of teaching, research, or counseling, under the direction of the University and using the facilities of the University.

Retired employees and employees on leave are eligible for staff fee privileges. Subject to the approval of the President or designee of the teaching institution, the maximum credit limitation may be waived for retired employees and for employees on leave. See exception under Senior Citizen Tuition.

Employees on furlough or lay-off status may be eligible for staff fees in accordance with provisions of a collective bargaining agreement.

The staff fee is not available to temporary classified employees or student employees, including Graduate Employees (GEs).

**Institutional Eligibility:** The benefit may be used at any Oregon four-year public institution. Employees who use the staff fee for courses away from their home institution are subject to staff fee policies and procedures of the instructing institution.

**Excluded UO Programs:** Staff fees are not applicable to self-support courses or to courses in excluded UO programs. Excluded programs are determined at the discretion of the President and the notice of exclusion must be filed with Human Resources office prior to the first day of registration for a term.

2021-222022-23 excluded programs are:

1. Self-support courses
2. School of Law – J.D. Program
3. School of Law — Conflict and Dispute Resolution (CRES)
4. School of Law — LLM Degrees
5. School of Journalism and Communication – Portland Program — Strategic Communication Masters
6. School of Journalism and Communication – Portland Program — Multimedia Journalism
7. School of Journalism and Communication – Advertising and Brand Management Program
8. Applied Information Management (AIM) — This program is ending and is covered by the self-support exclusion.
9. Clark Honors College – Differential Tuition Only

10. Lindquist College of Business – Sports Product Management Program
11. Lundquist College of Business – Oregon Executive MBA Program
12. Lundquist College of Business – Master of Finance Program
13. Lundquist College of Business – Undergraduate differential tuition
14. College of Design – Sports Product Design Program
15. Knight Campus – Industrial Internship Program
16. Online Psychology Master’s Program

*Auditing:* No tuition shall be assessed to courses enrolled in by employees with a grading option of ‘audit’. Attendance under such condition must be with the instructor’s consent and on a space-available basis. The University maintains a record of the courses audited. Courses approved for audit by the instructor confer no credit to the student, are not charged the staff fee rate or regular tuition, and may be used in addition to courses taken using the staff fee privilege during a term. However, any applicable course, lab, or material fees associated with auditing for-credit classes will be assessed by the institution and is the responsibility of the employee. This provision cannot be subdivided in conjunction with the Reduced Tuition Benefit for Family Members and Domestic Partners of Employees.

## **REDUCED TUITION BENEFIT FOR FAMILY MEMBERS OF EMPLOYEES**

To improve the recruitment and retention of high-quality faculty and staff, the staff fee privilege may be transferred to a qualified family member such as a spouse, domestic partner, or dependent child, on a limited basis. Only one (two, if the staff member is unclassified and meets the conditions outlined below) staff member, spouse, domestic partner, or dependent may use the staff fee benefit per term or semester. The benefit may not be subdivided among family members during a single term.

To qualify for this benefit, both the family member and employee must meet the eligibility criteria below no later than two weeks prior to the first day of classes of the term of enrollment.

*Rates:* The family/staff rate for family members of employees is 30% of resident undergraduate tuition and this rate applies to only the first 12 credits per term. For undergraduate students, the rate is applied to the tuition table attached to their tuition status (tuition cohort, continuing student or non-degree student). For a graduate student, the rate is applied to the most recent (undergraduate) tuition cohort tuition table. Above 12 credits, the student is assessed at the full “each additional credit” published on the tuition table attached to their tuition status (tuition cohort, continuing, graduate, non-degree). Differential tuition is exempt from the family/staff rate. There is no tuition plateau for a family member using the staff rate for graduate courses.

*Fees:* The family member to whom the benefit is transferred is responsible for all mandatory enrollment fees in addition to laboratory/course fees, late fees, and registration fees, if applicable. Breakage and/or other mandatory application deposits are required of the participating family member to register for classes.

*Employee Eligibility:* The staff fee privilege may be transferred to a qualified family member of an employee appointed at half-time (.5 FTE) or more, not including temporary classified employees, Graduate Employees (GEs), or other student employees. Employee eligibility is verified through Human Resource Information System records. The transfer of staff fee benefits is not available for retired

employees. Eligibility of employees on furlough or lay-off status is subject to applicable collective bargaining agreements.

*Family Member Eligibility:* Qualified family members include the eligible employee's spouse, domestic partner, dependent children, and dependent children of domestic partners in accordance with IRS Code 152 and Section One of the Public Employees Benefit Board.

*Second Family Member Eligibility:* Unclassified employees who meet the eligibility criteria and who are using the staff fee for the undergraduate education of a dependent child are entitled to a second, concurrent staff fee privilege for another dependent child to attend undergraduate programs only at the University of Oregon. The terms and conditions (i.e., rates, fees, eligibility requirements, credit limits, and excluded programs) are the same as under the Tuition Benefit for Employees and for Family Members.

*Institutional Eligibility:* The benefit may be used at any Oregon four-year public institution. Family members who use the staff fee for courses away from the employee's home institution are subject to staff fee policies and procedures of the instructing institution.

*Excluded UO Programs:* See "Reduced Tuition Benefit for Employees" above.

*Auditing:* No tuition shall be assessed to courses enrolled in by the Family Member with a grading option of 'audit'. Attendance under such condition must be with the instructor's consent and on a space-available basis. Institutions are required to maintain a record of the courses audited. Courses approved for audit by the instructor confer no credit to the student, are not charged staff fee rates or regular tuition, and may be used in addition to staff fee privileges during a term. Any applicable course, lab, or material fees associated with auditing for-credit classes will be assessed by the institution where the coursework is taken and is the responsibility of the family member. This provision cannot be subdivided in conjunction with the Reduced Tuition Benefit for Employees.

## GRADUATE EMPLOYEES

Graduate students appointed by the University as Graduate Employees (GEs), including as graduate teaching assistants, graduate research assistants, and graduate administrative assistants, are paid at established institutional salary rates and are exempt from the payment of tuition at the University up to the first 16 credits per term. Appointment as a GE may not be for less than .20 FTE for the term of appointment.

The tuition will be assessed to the employing department within the University, not to exceed the graduate resident, full-time student tuition per term. When a GE is authorized to exceed 16 credits per term, the University shall charge the GE the resident overload tuition for the excess credits that correspond to their major's tuition schedule. GEs are exempt from payment of tuition and of fees for self-support courses that are required for the completion of the degree for up to 16 credit hours taken in any quarter to which the appointment applies.

GEs are assessed mandatory enrollment fees, a portion of which is subsidized by the institution during each term.

Students with academic-year GE appointments may be eligible for a summer tuition waiver if they meet the criteria outlined on the Graduate School website.

## RESIDENT OREGON SENIOR CITIZEN PROGRAM

The Senior Citizen Program is designed for Oregon resident senior citizens, age 65 or older. Seniors may register to attend class as an auditor at no tuition charge on a space-available basis, and with the permission of the offering department. Participants must pay any required course fees. Classes taken under this program do not offer credit and cannot be counted toward a degree. If credit is sought, tuition and fees, as well as charges for special materials or fees, if any, will be assessed according to applicable tuition schedules and records will be maintained. Self-support classes are excluded from this benefit and Incidental Fee services are not available.

## AUDITORS

A student enrolled in a combination of for-credit and audit courses will be assessed for the total hours under the tuition and fee schedule, inclusive of for-credit and audited courses, appropriate to that individual's course or student level. If enrolled for audit courses only, the student will pay the same required fees as assessed for similar hours of for-credit classes.

## UNIVERSITY/SCHOOL PARTNERSHIP CO-PAY PROGRAM

School districts having contracts with the University to supervise educator professionals preparing for Oregon licensure may exercise these provisions.

### *Earning the Co-Pay*

For each permissible activity provided under contract with a cooperating district, a district earns a co-pay privilege to register any licensed educational professional employed by the district at the University co-pay fee rate. The rate should be one-third of the tuition charged for the course. Institutions with current contractual obligations may elect to defer compliance of the rate until expiration of the existing contract.

A "co-pay privilege" allows one individual to register for up to 8 quarter credit hours in the term it is used. The total reduced fee credits awarded for practica and student teaching may not exceed 11 in a year, per each University student provided services by the district.

Supervised full-time student teaching: Co-pay privileges of 5 credit hours may be awarded for supervision of the final full-time student teaching per quarter. Student teaching is the culminating, full-time supervised teaching experience provided for students completing a program approved by the Teacher Standards and Practices Commission, leading to Initial Licensure in one or more of four authorizations: Early Childhood, Elementary, Middle, and High School; and specialty endorsements.

Experiential preparatory practica or part-time student teaching: Co-pay privileges of 3 credit hours may be awarded for supervision of students in experiential preparatory practica or part-time student teaching per academic quarter. These are practica assigned to or required of the student prior to or concurrent with student teaching and block practica and/or other miscellaneous practica offered by colleges and divisions of education for students completing a program approved by the Teacher Standards and Practices Commission, leading to Initial Licensure in one or more of four authorizations: Early Childhood, Elementary, Middle, and High School; and specialty endorsements.

#### *Redeeming Reduced Fee Credits*

Earned co-pay privileges must be used by a licensed educator professional employed by the school district within five successive academic quarters (including summer session) following the quarter in which the supervision is provided, after which time the co-pay privilege is void.

The co-pay fee is applicable only up to 8 credit hours in any academic quarter for any one licensed educator professional, including summer session, even though the district may have earned two or more enrollment privileges, or if the licensed educator professional using the privilege enrolls for fewer than 8 credits.

Unused portions of an enrollment privilege may not be carried to another term or used by another teacher.

A co-pay privilege may be used during any academic term (including summer session) at the University to the extent that it has a teacher preparation program. The University may enter into "partnerships of trade" with any sister institution if they are willing to accept vouchers from other institutions.

The University may set limits on courses available for those redeeming vouchers/co-pays (for example, courses in summer session, distance education, continuing licensure, continuing/extended education). Each institution will indicate on the voucher the existence of restrictions.

The co-pay privilege may also be redeemed by an administrator, counselor, or other licensed educator professional in a cooperating district.

#### *Other Provisions*

##### *Fees*

If a licensed educator professional using a co pay privilege registers only for credits at the reduced tuition rate, mandatory enrollment fees do not apply and health services, incidental fee services, or PE and Rec Center membership services are not provided through this program. Other fees such as lab or course fees are assessed at the full rate and no discount is provided.

Licensed educator professionals using a co pay privilege who register for credits in excess of the number of credits approved for a reduced tuition benefit are responsible for all mandatory enrollment fees in addition to laboratory/course fees, late fees, and registration fees, if applicable. Breakage and/or other mandatory application deposits are required of the licensed educator professional.

Each institution may, at its discretion, extend to the eligible district licensed educator professional other privileges such as use of the institution library, access to campus parking, and admission to campus events at faculty and staff rates, provided that such extended privileges do not exceed the benefits made available to the faculty and staff of the institution.

## OTHER REMISSION PROGRAMS

The University may create individual fee remission programs to address enrollment management and financial aid program needs.

- *Awards:* Awards may vary in amount but cannot exceed the total cost of education.

## FEE POLICIES SPECIFIC TO SUMMER SESSION

The summer refund policy for course load reduction or withdrawal differs from the academic year policy; the policy can be found at <https://brp.uoregon.edu/content/Tuition-and-Fees>.

## REFUNDS, WAIVERS, AND ACCOUNTS RECEIVABLE POLICIES

### Refund Policies

Refund policies for course load reduction or withdrawal are subject to University policy and procedure. Refunds may be granted to students in accordance with the refund schedule at <https://brp.uoregon.edu/content/Tuition-and-Fees>.

### Military Duty Refund Policy

Any student service member or National Guard member with orders to report for active military duty may withdraw at any time during the term and receive a full refund. If sufficient course work has been accomplished and the instructor feels justified, the instructor may either grant credit for the course work completed and assign a grade or arrange for the student to take an incomplete. In either of these cases, no refund will be given. The student may use a combination of these options.

### Waiver of Certain Student Fees

Certain student fee charges may be waived when regulations of federal agencies or contract agreements preclude the assessment of those fees. Please contact the University's Business Affairs Office to determine which fee charges are eligible, if any, for this waiver.

### Institution Authority to Adjust Charges

The President or designee may make tuition refunds and waive fines or charges that result from circumstances beyond the student's control or are for the best interest of the institution.

## Revolving Charge Agreement

The University of Oregon has adopted a policy establishing a Revolving Charge Agreement. Transactions covered by the agreement may include (by way of description and not limitation) tuition, fees, residence hall room and board charges, and other obligations primarily involving students, including fees, fines, and penalties, incurred by anyone.

## Interest on Overdue Accounts

The University charges simple interest on the total due amount not paid within the grace period. The annual rate is 9 percent. The periodic rate of interest is .75 percent per month, or fraction thereof, of the unpaid total due balance remaining on the account as of the tenth of the month.

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UNIVERSITY OF OREGON

# **BOARD OF TRUSTEES OF THE UNIVERSITY OF OREGON**

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**POLICIES ON TUITION, MANDATORY  
ENROLLMENT FEES AND OTHER CHARGES,  
FINES, AND FEES**

**2022-23 ACADEMIC YEAR**

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**2023 SUMMER SESSION**

## Contents



UNIVERSITY OF OREGON

.....	1
<b>Authority.....</b>	<b>4</b>
Board of Trustees of the University of Oregon .....	4
<b>Tuition and Fee Policies for 2022-23.....</b>	<b>5</b>
Tuition and Mandatory Fee Structures.....	5
Tuition.....	5
Mandatory Enrollment Fees .....	5
Campus-based Fee Structure.....	6
Student Definitions .....	7
Tuition and Administrative Mandatory Fees for Students in a Tuition Cohort .....	7
Tuition and Administrative Mandatory Fees for Continuing Students .....	9
Tuition and Administrative Mandatory Fees for Graduate Students.....	9
Tuition and Administrative Mandatory Fees for Non-admitted Students .....	9
All Other Fees.....	9
<b>Scholarship and Tuition Remission Policies.....</b>	<b>11</b>
Student Financial Aid Programs.....	11
Diversity Programs.....	12
International Recruitment Programs.....	12
International Exchanges .....	12
Contract and Grant .....	13
University of Oregon Tuition Grant .....	13
Veteran Programs .....	13
VOYAGER Fee Remission .....	13
Veterans' Dependent Tuition Waiver .....	14
Federal Laws Requiring Resident Tuition .....	15
Oregon State Laws Granting Resident Tuition .....	16

Foster Youth Tuition Waiver .....	17
Tuition Equity .....	18
Other Financial Aid Programs .....	20
<b>Reduced Tuition Benefit for Academic and Classified Employees .....</b>	<b>20</b>
<b>Reduced Tuition Benefit for Family Members of Employees .....</b>	<b>22</b>
<b>Graduate Employees.....</b>	<b>23</b>
<b>Resident Oregon Senior Citizen Program .....</b>	<b>24</b>
<b>Auditors .....</b>	<b>24</b>
<b>University/School Partnership Co-Pay Program.....</b>	<b>24</b>
<b>Other Remission Programs .....</b>	<b>26</b>
<b>Fee Policies Specific to Summer Session .....</b>	<b>26</b>
<b>Refunds, Waivers, and Accounts Receivable Policies .....</b>	<b>26</b>
Refund Policies.....	26
Military Duty Refund Policy .....	26
Waiver of Certain Student Fees .....	26
Institution Authority to Adjust Charges.....	26
Revolving Charge Agreement .....	27
Interest on Overdue Accounts.....	27

## AUTHORITY

### Board of Trustees of the University of Oregon

Under ORS 352.102, the Board of Trustees (“Trustees” or “Board”) of the University of Oregon (“University” or “UO”) may authorize, establish, eliminate, collect, manage, use in any manner and expend all revenue derived from tuition and mandatory enrollment fees.

Under ORS 352.105, the Board will also collect mandatory Incidental Fees upon the request of the Associated Students of the University of Oregon (“ASUO”) under a process established by the ASUO in consultation with the Trustees. Mandatory Incidental Fees collected by the Board will be allocated by the recognized student government. The mandatory Incidental Fee proposed by the ASUO, uses of the fee, or decision to modify an existing fee may be refused by the Board or the University President (“President”) if one determines that:

- The recognized student government assessed or allocated the mandatory incidental fees in violation of applicable local, state, or federal law;
- The allocation conflicts with a preexisting contractual financial commitment;
- The total mandatory incidental fees budget is an increase of more than five percent over the level of the previous year; or
- The fee request is not advantageous to the cultural or physical development of students.

Under ORS 352.087(1)(d), the Board may establish, collect and use charges, fines and fees for services, facilities, operations and programs. This provision does not cover tuition and mandatory enrollment fees or incidental fees, but does cover every other charge, fine, or fee that could be established.

Tuition for students enrolled in a program is established based on state-appropriated funds per full-time equivalent student, the financial needs of the University, market comparators, student classification (including, but not limited to, undergraduate, graduate, and doctoral), residency, credit hours taken, degree program, and other factors. In determining tuition for undergraduate students who are enrolled in a degree program and are qualified to pay resident tuition:

- (1) The Board may not increase the total of tuition and mandatory enrollment fees by more than five percent annually unless the Board first receives approval from:
  - a) The Higher Education Coordinating Commission; or
  - b) The Legislative Assembly.
- (2) The Board shall attempt to limit annual increases in tuition and mandatory enrollment fees for undergraduate students who are enrolled in a degree program and have established residency in Oregon to a percentage that is not greater than the percentage increase in the Higher Education Price Index, as compiled by the Commonfund Institute.

The Board may not delegate authority to determine tuition for undergraduate students who are enrolled in a degree program and are qualified to pay tuition. Revenues derived from tuition may be managed and used in any manner.

Tuition may be established for any University program and may vary by term.

A fee is a mandatory enrollment fee if it is required to be paid as a condition of enrollment in the University by every enrolled student.

The Board may not delegate authority to determine mandatory enrollment fees for undergraduate students who are enrolled in a degree program and are qualified to pay tuition. The University has the option of assessing mandatory enrollment fees during the summer session at rates comparable to those assessed in the academic year.

## TUITION AND FEE POLICIES FOR 2022-23

### Tuition and Mandatory Fee Structures

As of summer 2020, the University of Oregon will transition from a standard undergraduate tuition and fee structure to a Guaranteed Tuition Program under which students will know the cost of their education for at least 5 years. Both tuition and mandatory enrollment fees (other than the Incidental Fee) will be included in the guaranteed structure. The Guaranteed Tuition Program is mandatory.

#### **Tuition**

Some UO coursework is designated as self-support or study abroad. These courses have their own tuition structure designed to cover the direct and indirect cost of the course. Specific tuition for self-support courses and study abroad programs is not covered by this document and such courses are not part of the tuition structures described here.

Tuition is assessed based on the student's residency classification, level (undergraduate/graduate) and major, regardless of course level, with exceptions for students enrolled in joint baccalaureate/graduate programs where tuition is assessed by course level rather than student level. Going forward, tuition will also be based on *tuition cohort* (see below).

#### **Mandatory Enrollment Fees**

Mandatory Enrollment Fees consist of the following:

- **Building Fee:** The Building Fee is used to fund the construction and provide debt service for capital projects, primarily those associated with student centers, health centers, and recreational facilities.

- **Health Service Fee:** The Health Service Fee is used to support student health and counseling services. Students enrolled in UO Portland programs use the Portland State University (“PSU”) Student Health Center and pay the same Health Service Fee as PSU students.
- **Recreation Center Fee:** The Recreation Center Fee is used to fund the construction, debt service, maintenance, and operation costs of the student recreation center.
- **Student Union Fee:** The Student Union Fee is used to fund the construction, debt service, maintenance, and operation costs of the student union.
- **Technology Fee:** The Technology Fee helps the University make important investments to maintain and improve the core infrastructure our technology relies on, and to stay abreast of rapidly changing technological advances.
- **Incidental Fee:** The Incidental Fee supports activities that provide for the social, cultural, educational and physical development of students. Incidental Fee recommendations for Academic Year 2022-23 were approved by student committees and forwarded to the President for endorsement in accordance with UO Policy III.03.03.

**The first five of these fees are herein referenced as the administrative mandatory fee set. The incidental fee is not part of this set.**

### Campus-based Fee Structure

Students enrolled in Eugene campus courses are required to pay all mandatory fees. Students enrolled at the Portland or Charleston campuses, or at an off-campus site, do not pay Recreation Center or Student Union fees, and they pay 50% of the Incidental Fee. Students in a Portland program are required to pay Portland State University’s Health Service Fee and students at the Charleston campus pay UO’s Health Service Fee. Students at an off-campus site do not pay the Health Service Fee. For the purpose of assessing fees, students enrolled in only online courses pay the Off-Campus set of fees. Non-admitted students do not pay the Health-Service Fee.

Campus-based Fee Structure	2022-23 Academic Year			
	Eugene Campus	Portland Campus	Charleston Campus	Off-campus Site
Building Fee	✓	✓	✓	✓
Health Service Fee	✓	✓ (PSU Health Service Fee)	✓	
Recreation Center Fee	✓			
Student Union Fee	✓			
Technology Fee	✓	✓	✓	✓
Incidental Fee	✓	✓ (50% of I-fee)	✓ (50% of I-fee)	✓ (50% of I-fee)

## Student Definitions

**Tuition Cohort or Tuition Cohort Student.** For the purpose of this fee book, a tuition cohort is the collection of undergraduate students who matriculated and first enrolled as undergraduates during any of the four terms beginning with the summer of the referenced year. For example, tuition cohort 2020 is comprised of those students who matriculated and first enrolled during summer 2020, fall 2020, winter 2021, or spring 2021. Tuition cohort 2020 is the first official tuition cohort. Students who matriculated and enrolled prior to summer 2020 are not members of any tuition cohort.

**Continuing Student.** For the purpose of this fee book, a continuing student is any undergraduate student who initially matriculated and enrolled prior to summer term 2020.

**Graduate Student.** For the purpose of this fee book, a graduate student is any student accepted and currently enrolled in a graduate program.

**Non-admitted Undergraduate Student.** A student who is not admitted to the university and does not hold an accredited baccalaureate degree.

**Non-admitted Graduate Student.** A student who is not admitted to the university and holds an accredited baccalaureate degree.

**Non-Graduate Post-Baccalaureate Student.** A holder of an accredited baccalaureate degree who has not been admitted to a graduate degree program and who is admitted to pursue a second baccalaureate degree or enroll in course work not to be used for credit toward a graduate degree is called a non-graduate post-baccalaureate student. Such students may be continuing students, tuition cohort students, or non-admitted students as outlined above and their tuition and administrative mandatory fees will be assessed accordingly.

**Graduate Post-Baccalaureate Student.** A holder of an accredited baccalaureate degree who is not admitted to a graduate program but wishes to pursue credit towards a graduate degree or graduate certificate program is called a graduate post-baccalaureate student. Graduate post-baccalaureate students are considered graduate students.

**Student Residency.** A resident student is one who fulfills requirements established by the Inter-Institutional Residency Compact between and among the seven public universities in Oregon. Graduate students who have a teaching, research, or administrative Graduate Employee position, or are supported by an eligible training grant or graduate fellowship, are assessed at resident tuition and fee rates.

## Tuition and Administrative Mandatory Fees for Students in a Tuition Cohort

For students in a tuition cohort, the institution guarantees tuition and total administrative mandatory fees will be the same for the five-year period that extends from the summer term that begins the definition of the cohort and ends with spring term, 20 terms later (see table below). Tuition charged during the regular academic year will be locked for the five-year period. Tuition charged during the five-year period for summer term will also be locked, however, the summer tuition rates will be locked at a

set discount from academic year rates. Similarly, rates for each administrative mandatory fee will be locked for the five-year period. The schedule of which administrative mandatory fees are assessed to a student each term, will vary, based on whether a student is studying on the Eugene campus or another location. Students studying in Portland have access to Portland State University's (PSU's) Health Service and are assessed the PSU Health Service fee instead of the UO Health Service Fee. The PSU Health Service Fee rates are not locked for the five-year period and will vary each year based on the specific rate structure set by Portland State University. Differential tuition is included in this guaranteed tuition structure. Laboratory and course fees are not included in the guaranteed tuition structure.

For each additional year a student in the tuition cohort remains enrolled beyond the five-year guarantee, tuition and administrative mandatory fees will revert to the tuition and fee levels of the next tuition cohort.

TUITION COHORTS	Student Initial Enrollment				Final Term of Guarantee
2020 Tuition Cohort	Summer 2020	Fall 2020	Winter 2021	Spring 2021	Spring 2025
2021 Tuition Cohort	Summer 2021	Fall 2021	Winter 2022	Spring 2022	Spring 2026
2022 Tuition Cohort	Summer 2022	Fall 2022	Winter 2023	Spring 2023	Spring 2027

For example, new students who enroll in summer of 2020, fall 2020, winter 2021, or spring 2021 are part of the 2020 tuition cohort. **The five-year tuition and administrative mandatory fee guarantee for these students expires at the end of spring term of the tuition cohort's fifth year, spring 2025.**

To continue the example, if a student in the 2020 tuition cohort remains enrolled as an undergraduate in fall 2025 they will be assessed the same tuition and administrative mandatory fees as the 2021 tuition cohort. If they remain enrolled in fall 2026 they will be assessed the same tuition and fees as the 2022 tuition cohort, and so on.

Summer term tuition for the 2020 tuition cohort will be 85% of academic year tuition for residents and 65% of regular academic year tuition for non-residents.

The fixed tuition and administrative mandatory fee guarantee for a tuition cohort is for five years with the following exceptions:

**Withdrawal from the University for U.S. Military or Other U.S. National Defense Services.**  
Students who are called to active duty in the United States military as a result of national emergency or as a result of the mobilization of the reserve forces, including the National Guard, and re-enroll at the University within one year after the completion of their active military service will be entitled to resume their five-year guarantee for the amount of time remaining in their guarantee at the time of their military withdrawal. The student must submit a petition to initiate the extension.

**Extraordinary Circumstances.** Students who believe the circumstances of their situation merit an extension may appeal to the Office of the Registrar. Because the fixed-tuition guarantee is for five years, non-military exceptions will rarely be granted.

As long as a student from a tuition cohort is an undergraduate or non-graduate post-baccalaureate student, they remain in their tuition cohort. Students from a tuition cohort who are accepted to and enroll in a graduate program are no longer in their tuition cohort and will pay graduate tuition as described below.

### **Tuition and Administrative Mandatory Fees for Continuing Students**

Total tuition and administrative mandatory fees for continuing students will increase by a fixed percentage in each of the next four years, beginning with fall 2020. After spring 2024, any continuing students who continue to be enrolled as undergraduates will be added to the 2020 tuition cohort.

Summer session tuition for continuing students will be 85% of the previous academic year tuition for residents and 65% of regular academic year tuition for non-residents.

### **Tuition and Administrative Mandatory Fees for Graduate Students**

Tuition for graduate programs is determined program by program. All graduate students will pay a set of published administrative mandatory fees.

### **Tuition and Administrative Mandatory Fees for Non-admitted Students**

Non-admitted students are always charged tuition and administrative mandatory fees at the most recent undergraduate tuition cohort rate for undergraduate level courses (100-499) and current graduate rates for graduate level courses (500+).

## **All Other Fees**

Other fees include all charges, fines, and fees that are neither tuition nor mandatory enrollment fees. The Board, the President, or designee may establish these fees and use them for services, facilities, operations, and programs.

- **Matriculation Fee:** The Matriculation Fee is a one-time fee charged to newly admitted students upon enrollment. This one-time assessment was developed to reduce the large number of enrollment-related fees. The fees are also used to support academic programming for Freshman Interest Groups and other learning communities.
- **Differential Tuition:** Schools and colleges may charge tuition by course or program when special circumstances exist. These circumstances may include, but are not limited to, an extraordinary cost of offering the course or academic program (e.g., need for specialized equipment and supplies; accreditation standards; delivery methods). Setting tuition by program assigns a per-credit price for all the core courses in an academic program, whether or not the student is degree-seeking within that program. Differential course and program tuition rates are reviewed by the Tuition and Fee Advisory Board (TFAB) and approved by the Board as part of the fee-setting process.

- ***Undergraduate International Student Fee:*** The University sets the Undergraduate International Student Fee to provide a set of services and programming to support international students, including students enrolled in the American English Institute (“AEI”) program. The fee supports services related to academic support; enrollment services; increased immigration compliance and reporting as required by the federal government (such as SEVIS II); personal and cultural counseling and advising; and accelerated planning and delivery of new programs.
- ***Laboratory and Course Fees:*** Generally, laboratory and course fees are limited to fees for equipment, materials, field trips, or ancillary services consumed by the student as a part of course instruction where the equipment or material is not readily available for purchase through a private source. Fees can also cover one-on-one or small group physical education, music and dance instruction. Laboratory and course fees must be published. For further information <https://brp.uoregon.edu/content/Fee-Guidelines>.
- ***Online Course Fee:*** All online courses have an additional per-credit fee which gives students access to a suite of services, including a chat/call center for expedited assistance, extended help desk hours for technical support, and exam proctoring services.
- ***Other Charges, Fees, and Fines for Services, Facilities, Operations, and Programs:*** The level of charges, fees, and fines should be at least sufficient to ensure recovery of associated direct and indirect costs. Some charges, fees, and fines may be established at a level to deter conduct that is contrary to University policies and standards or applicable law. Charges, fees, and fines are for purposes such as the following: auxiliary services such as housing, food services, and parking; use of facilities; athletics and other tickets and events; and violation of policies and standards, such as late fines for library books and parking fines. These charges, fees, and fines are reviewed, updated, and published annually through a process administered by the Office of Budget and Resource Planning (BRP) office. In extraordinary situations, the University can alter existing fees or propose new fees outside of the annual approval process, via an interim review process. Certain charges, fees or fee schedules are adopted without following the BRP process. They include things such as charges relating to symposiums, conferences, short courses, food, books or other retail goods, prices of admission to athletic, entertainment or cultural events or advertising rates in student or institutional publications. For further information <https://brp.uoregon.edu/content/Fee-Guidelines>.
- ***Application Fees:*** The President or designee determines application fees. The University may assess greater application fees for admission to selected programs or schools. The relevant application fee must be received before the application will be evaluated. Application fees are not refundable.

***Undergraduate Application Fee Waiver:*** The President or designee may, upon request, waive the application fee for first-time freshmen or transfer students who, at the time of application, demonstrate high financial need, as evidenced by:

- Participation in a free or reduced school lunch program;
- Pell-eligible status provided on FAFSA-related documents;

- Involvement in TRIO-type college preparatory programs (e.g., Upward Bound, Talent Search, EOC, HEP);
- State of Oregon or U.S. public assistance;
- Submission of a College Board, NACAC, or Foster Youth Tuition and Fee waiver; or
- Other factors illustrating financial hardship, at the discretion of the Office of Admissions.

No applicant will be granted a fee waiver unless they are determined to have genuine financial need. Prospective students who are classified as international applicants are not eligible for an application fee waiver. However, undocumented Oregon high school students who are potentially eligible for the state's Tuition Equity Program can be granted a waiver on a case-by-case basis. The Office of Admissions administers the application fee waiver program, and its Director may add, remove, or modify methods of confirmation as needed over time.

To request an application for Application Fee waiver, go to:

<http://admissions.uoregon.edu/counselors/feedeferral>. The student must complete the form and, as appropriate, obtain needed signatures to confirm her/his status.

**Graduate Application Fee Waiver:** A limited number of waivers of the graduate application fee are available for graduate applicants who are:

- An admitted graduate student or an applicant that has already paid the UO graduate admission application fee for the same academic year;
- An employee eligible for staff tuition rates;
- A participant in an undergraduate research program for minority students;
- A participant in a service-based organization such as the Peace Corps;
- An active member, reservist, or veteran of the U.S. armed services;
- Eligible for a waiver based on financial need.

The Graduate School administers the graduate application fee waiver program. Applicants may request a waiver as part of the online application for Graduate School admission.

## SCHOLARSHIP AND TUITION REMISSION POLICIES

The University's commitment to the 40-40-20 goal described in ORS 350.014 is achieved through an array of scholarship and financial aid programs and policies. These programs and policies promote the University's goals of providing accessibility to high-quality higher education.

### Student Financial Aid Programs

The combined aid for a student may not exceed the cost of attendance for that student, except as approved by the President or designee. The University's student financial aid offerings are comprised of programs like others offered across the country (often referred to as "fee waivers" or "tuition discounts") enhanced by initiatives specific to the University or the state of Oregon. As an enrollment management tool, programmatic student aid allows the University to target specific campus enrollment

goals including recruitment of needy or meritorious students, international students, athletes, and other student populations. The following are summaries of University student financial aid programs:

## Diversity Programs

- **University of Oregon Diversity Initiatives**
  - *Criteria:* These initiatives are open to all admitted students, resident or nonresident, undergraduate, graduate, or law. The programs may consider different factors in making awards and may offer financial aid programs that support the University's commitment to diversity and supports its educational mission.
  - *Awards:* The University may make partial or full scholarships based on financial need, or to expand the number of students who receive at least some funding support. Awards are specific to the University of Oregon, and students may not take a scholarship with them if they move to another institution.

## International Recruitment Programs

- **International Fee Remission Program**
  - *Criteria:* This program is for admitted undergraduate or graduate students with international student status.
  - *Awards:* Awards may vary in amount but cannot exceed the total amount of the International Student Services Fee. The University has the option to remit all or a portion of this fee.
- **Cultural Service Program**
  - *Criteria:* This program is for admitted undergraduate or graduate students with international student status who are competitively selected based on academically meritorious achievement, and who fulfill the community service requirements of the program while receiving the award.
  - *Awards:* Awards may vary in amount but cannot exceed the total nonresident undergraduate or graduate tuition and mandatory enrollment fees. Remission of mandatory enrollment fees is at the University's option.

## International Exchanges

- **IE3 Global Programs**
  - *Criteria:* This program is for students who are attending University of Oregon as a part of an exchange program managed by IE3 Global and approved by the University of Oregon.

- *Awards:* Awards may consist of remission of all or some of the Enrollment Fees, depending upon the reciprocal agreement under which the student is enrolled.

## Contract and Grant

- **Contract and Grant: Academic Year**
  - *Criteria:* This provision is for students who participate in specific courses or programs during the academic year funded by grant or contract with an outside agency or firm.
  - *Awards:* Awards are generally for remission of tuition only, depending upon agreement with the granting agency
- **Contract and Grant: Summer Session**
  - *Criteria:* This provision is for students who participate in specific courses or programs during the summer session funded by grant or contract with an outside agency or firm.
  - *Awards:* Awards are generally for remission of tuition only, depending upon agreement with the granting agency.

## University of Oregon Tuition Grant

- *Criteria:* The University of Oregon Tuition Grant is a need-based tuition grant program available to qualified Oregon resident undergraduates.
- *Awards:* These supplemental tuition grants may not exceed the total tuition assessed for the regular academic year.

## Veteran Programs

### VOYAGER Fee Remission

The Voyager Tuition Assistance Program ("VOYAGER") was implemented in the fall of 2005 in response to a direct gubernatorial request and is intended for National Guard or Reservists who have been in an active duty capacity in a combat zone on or after 9/11/2001.

- *Criteria:* The VOYAGER fee remissions are for Oregon residents who are members of the National Guard or Reserves and were deployed in an area of military combat since September 11, 2001. This fee remission is for full-time students pursuing their initial bachelor's degree. Students must submit a Free Application for Federal Student Aid ("FAFSA") annually and continue to maintain satisfactory academic progress to maintain eligibility.
- *Awards:* Award is the difference between the National Guard and Reserves tuition benefit of \$4,500 or the VA Chapter 33 Tuition Fee benefit and total enrollment fees. Students are

responsible for securing the National Guard or Reserves tuition benefit. Duration of the VOYAGER award is four years excepting those five-year degree programs as documented in the University catalog. Students are not eligible for the award once they earn fifteen credits beyond the minimum number of credits required by the degree.

### **Veterans' Dependent Tuition Waiver**

- *Criteria:* The Veterans' Dependent tuition waiver is for qualified students admitted to a first-time baccalaureate or master's degree program. A qualified student is a child (includes adopted child or stepchild), spouse, or a surviving spouse who has not remarried, of a service member or a child of a Purple Heart recipient.
  - The service member is one who:
    - Died on active duty;
    - Has a 100% service-connected disability rating as certified by the United States Department of Veterans Affairs or by any branch of the Armed Forces of the United States; or
    - Died as a result of a military service-connected disability.
  - The Purple Heart recipient is a person, alive or deceased, who:
    - Was relieved or discharged from service in the Armed Forces of the United States with either an honorable discharge or a general discharge under honorable conditions; and
    - Was awarded the Purple Heart in 2001 or thereafter for wounds received in combat.
- An eligible child must be 23 years of age or younger at the time the child applies for the waiver. A child who is older than 23 years of age is eligible for a waiver for a master's degree program if the child:
  - Applied for and received a waiver for a baccalaureate degree when the child was 23 years of age or younger; and
  - Applied for a master's program waiver within 12 months of receiving a baccalaureate degree.

The qualifying student must meet Oregon residency requirements.

- *Awards:* The award does not cover other mandatory enrollment and course specific fees. The maximum waiver granted under this remission program shall be:
  - The total number of attempted credit hours equal to four years of full-time attendance for a baccalaureate degree; and
  - The total number of attempted credit hours equal to two years of full-time attendance for a master's degree.
- Notwithstanding sections 1 and 2 of this paragraph, a waiver may not exceed the total number of credit hours the qualified student needs to graduate with a baccalaureate or a

master's degree. Transferred credit hours accepted for a degree program may or may not count toward the total credit hours needed for degree completion.

1. The amount of tuition waived may be reduced by the amount of any federal aid scholarships or grants, awards from the Oregon Opportunity Grant program established under ORS 348.205, or any other aid from the eligible post-secondary institution, received by the qualified student.
2. The amount of tuition waived may not be reduced by the amount of any Survivors' and Dependents' Educational Assistance under 38 U.S.C. Chapter 35 paid to a qualified student.
3. Awards to children of Purple Heart recipients apply only to students admitted as new but not continuing for fall 2013 or thereafter.
4. Please, visit the University of Oregon webpage at <https://brp.uoregon.edu/content/Tuition-and-Fees> for additional program information and application process.

### **Federal Laws Requiring Resident Tuition**

Section 702 of the Veterans Access, Choice, and Accountability Act of 2014 [effective July 1, 2015] was codified in 38 U.S.C. 3679(c). In 2016 Congress passed Public Law 114-315 [effective July 1, 2017], which modified 38 U.S.C. 3679(c). In 2018 Congress passed Public Law 115-251 [effective April 1, 2019 at UO], which further amended 38 U.S.C. 3679(c). The following policy includes the provisions of 38 U.S.C. 3679(c), as amended.

The following individuals shall be charged the in-state rate, or otherwise considered a resident, for tuition and fees purposes:

- A Veteran using educational assistance under either Chapter 30 (Montgomery G.I. Bill® – Active Duty Program) or Chapter 33 (Post-9/11 G.I. Bill®), of title 38, United States Code, who lives in the state of Oregon while attending the University of Oregon (regardless of his/her formal state of residence) and enrolls at the University of Oregon within three years of discharge or release from a period of active duty service of 90 days or more.
- Anyone using transferred Post-9/11 GI Bill benefits (38 U.S.C. § 3319) who lives in the state of Oregon while attending the University of Oregon (regardless of his/her formal state of residence) and enrolls at the University of Oregon within three years of the transferor's discharge or release from a period of active duty service of 90 days or more.
- Anyone described above while he or she remains continuously enrolled (other than during regularly scheduled breaks between courses, semesters, or terms) at the University of Oregon. The person so described must have enrolled at the University of Oregon prior to the expiration of the three year period following discharge or

release as described above and must be using educational benefits under either Chapter 30 or Chapter 33, of title 38, United States Code.

- Anyone using benefits under the Marine Gunnery Sergeant John David Fry Scholarship (38 U.S.C. § 3311(b)(9)) who lives in the state of Oregon while attending the University of Oregon (regardless of his/her formal state of residence).
- Anyone using transferred Post-9/11 GI Bill benefits (38 U.S.C. § 3319) who lives in the state of Oregon while attending the University of Oregon (regardless of his/her formal state of residence) and the transferor is a member of the uniformed service who is serving on active duty.
- Anyone using educational assistance under Chapter 31, Vocational Rehabilitation and Employment (VR&E), who lives in the state of Oregon while attending the University of Oregon (regardless of his/her formal state of residence).
- The GI Bill® is a registered trademark of the U.S. Department of Veterans Affairs (VA). More information about education benefits offered by the VA is available at the official.

#### **Oregon State Laws Granting Resident Tuition**

The following outlines the provisions of ORS 350.290 from the original House Bill 2158 and as amended by House Bills 4021, 2670, and 4019 as they pertain to University of Oregon tuition and fee charges for certain veterans and dependents.

The University of Oregon shall charge an enrolled student who is not a resident of this state and who is attending classes as an undergraduate or graduate student (but not students pursuing a second bachelors, second masters, or second doctoral degree) tuition and fees no greater than the resident rate if the student:

1.
  - (a) Served in the Armed Forces of the United States;
  - (b) Was relieved or discharged from that service with either an honorable discharge or a general discharge under honorable conditions; and
  - (c) Provides proof that the student has established a physical presence in Oregon within 12 months of being enrolled at the University of Oregon;
2. Was, or is the dependent of, a resident of Oregon who left the state within the previous five years in order to serve, and who subsequently served, in the Armed Forces of the United States; or
3. Was, or is the dependent of, a resident of Oregon who left the state more than five years ago in order to serve, and who subsequently served, in the Armed Forces of the United States; and since leaving the state, has never established residence in another state.

A student who served in the Armed Forces of the United States and who receives federal tuition benefits in excess of the tuition and fees the person is charged under this policy shall pay tuition and fees equal to the federal tuition benefits received.

Distance education and self-support courses are exempt from the tuition reduction provisions of this policy.

If a nonresident student otherwise eligible for tuition benefits under this policy is receiving federal vocational rehabilitation education benefits, that student shall pay full nonresident tuition and fees charged by the University of Oregon.

An eligible student should submit a copy of his/her DD214 to the University of Oregon Office of Veterans Affairs in 244 Oregon Hall. Additional documentation may be required.

## Foster Youth Tuition Waiver

The Foster Youth Tuition and Fee Waiver originated with the passage of HB 3471 in the 2011 Regular Session of the Oregon Legislative Assembly and is intended to “increase access to higher education for current and former foster children by providing a Tuition and Fee Waiver” to minimize the amount of tuition absorbed by the student. It was further amended by HB 2095 in the 2013 Regular Session to align the definition of “former foster youth” with the federal standard.

- *Criteria:* The Foster Youth Tuition and Fee Waiver is open to qualified current and former foster children enrolled as undergraduate students within the University for the purposes of pursuing an initial undergraduate degree (as evidenced by admission into an undergraduate degree program). This program waives tuition and fees for current and former foster youth who enroll prior to reaching 25 years of age until the student receives “the equivalent of four years of undergraduate education.”
- To qualify for the program, the student must:
  - Have spent at least 180 days in substitute care after age 14, was not dismissed from care prior to reaching 16 years of age, and either left foster care (had wardship terminated) or completed high school/GED within the previous 3 years; and
  - Be admitted to an undergraduate degree program and enroll prior to reaching 25 years of age; and
  - Submit a completed FAFSA for each academic year they are eligible for the program; and
  - Service hours are no longer required
- *Awards:*
  1. A qualified student for the Foster Youth Tuition and Fee Waiver is entitled to waiver of tuition and fees as noted below:
    - a. Tuition for academic credit courses (at base or differential rates depending upon program to which student is admitted) but not for noncredit courses.
    - b. Mandatory enrollment fees.
    - c. Fees required for instruction-related services such as lab or course fees that are assessed upon registration for a course.

- d. The waiver excludes all other charges, fees, and fines such as residence hall room and board, dining services, parking fees and fines, library fines, etc. In addition, textbooks and other course materials not assessed as part of a course fee are also excluded. Fees considered as "pass through" fees (i.e., paid to an outside provider) are exempt from the Tuition and Fee Waiver.
2. Eligible students may receive the Foster Youth Tuition and Fee Waiver for up to 12 terms of full-time study or the equivalent. Attendance at less than full-time will be prorated accordingly.
3. If a student meets all other criteria for eligibility but does not require the Foster Youth Tuition and Fee Waiver, the student shall remain eligible until the student receives the equivalent of 4 years of undergraduate education.
4. As noted previously, to be considered eligible for this program, the student must complete and submit a FAFSA for each academic year they are eligible for the program. Awards made under the Foster Youth Tuition and Fee Waiver shall be applied after the following:
  - a. Any federal Pell or Supplemental Educational Opportunity Grants (SEOG)
  - b. Oregon Opportunity Grant established under ORS 384.205
  - c. Any other gift, grant, or scholarship received from the University which may be applied to the tuition and fees covered under this program.
5. For purposes of this program, non-tuition scholarships from sources outside of the University, which pass through either OSAC or the institution, are not included in the calculation of the tuition and fee waiver award amount.

*Definition of Terms:* For purposes of this waiver, the following terms are defined as follows: A "former foster child" is defined as an individual who, for a total of six or more months while between 14 and 21 years of age, was:

- A ward of the court pursuant to ORS 419B.100(1)(b) to (e) and in the legal custody of the Oregon Department of Human Services (or one of the nine federally recognized Tribes in Oregon) for out-of-home placement and not dismissed from care before reaching 16 years of age; or
- An Indian child subject to the Indian Child Welfare Act (25 U.S.C. 1901 et seq.), under the jurisdiction of a tribal court for out-of-home placement and not dismissed from care before reaching 16 years of age.

Please, visit the University of Oregon webpage at <https://brp.uoregon.edu/content/Tuition-and-Fees> for additional program information and application process.

## Tuition Equity

The 2013 Oregon Legislature passed the Tuition Equity Act. The Tuition Equity Act, as outlined in House Bill 2787 (2013), became law on April 2, 2013, and exempts the following students from paying nonresident tuition and fees for enrollment in Oregon's public universities:

1. Students who are not citizens or lawful permanent residents of the United States provided the student:
  - a. During each of the three years immediately prior to receiving a high school diploma or leaving school before receiving a high school diploma, attended an elementary or a secondary school in Oregon;
  - b. During each of the five years immediately prior to receiving a high school diploma or leaving school before receiving a high school diploma, attended an elementary or a secondary school in any state or territory of the United States, the District of Columbia, or the Commonwealth of Puerto Rico;
  - c. No more than three years before initially enrolling in an Oregon public university, received a high school diploma from a high school in this state or received the equivalent of a high school diploma (such as a GED); and
  - d. Shows intention to become a citizen or a lawful permanent resident of the United States by submitting to the University:
    - An official copy of the student's application to register with a federal immigration program or federal deportation deferral program, or a statement of intent that the student will seek to obtain citizenship as permitted under federal law; and
    - An affidavit stating that the student has applied for a federal individual taxpayer identification number or other official federal identification document.
2. Students who are financially dependent upon a person who is not a citizen or a lawful permanent resident of the United States if the student:
  - a. During each of the three years immediately prior to receiving a high school diploma or leaving school before receiving a high school diploma, attended an elementary or a secondary school in this state and resided in this state with the person upon whom the student is dependent;
  - b. During each of the five years immediately prior to receiving a high school diploma or leaving school before receiving a high school diploma, attended an elementary or a secondary school in any state or territory of the United States, the District of Columbia, or the Commonwealth of Puerto Rico and resided with the person upon whom the student is dependent;
  - c. No more than three years before initially enrolling in an Oregon public university, received a high school diploma from a secondary school in this state or received the equivalent of a high school diploma.
3. For a student who is not already a citizen or lawful permanent resident of the United States, shows intention to become a citizen or a lawful permanent resident of the United States by submitting to the public university the student attends or plans to attend:
  - a. An official copy of the student's application to register with a federal immigration program or federal deportation deferral program, or a statement of intent that the student will seek to obtain citizenship as permitted under federal law; and

- b. An affidavit stating that the student has applied for a federal individual taxpayer identification number or other official federal identification document.

A student will continue to qualify for exemption from nonresident tuition and fees (e.g., be able to pay in-state tuition rates) under subsection (1) or (2) above for five years after initial enrollment.

A student who is a citizen or a lawful permanent resident of the United States and who has resided outside of Oregon for more than three years while serving in the Armed Forces of the United States, but who otherwise meets the requirements of subsection (1) or (2) above, shall qualify for exemption from nonresident tuition and fees for enrollment in a public university listed in ORS 352.002 without having to reestablish residency in Oregon.

Please, visit the University of Oregon webpage at <https://brp.uoregon.edu/content/Tuition-and-Fees> for additional program information and application process.

## Other Financial Aid Programs

The University may create other individual financial aid programs to address enrollment management and financial aid program needs.

- *Criteria:* The University of Oregon scholarship programs are merit and/or need-based awards that support the mission and goals of the University. These scholarships assist in the recruitment and retention of students.
- *Awards:* Scholarship amounts and eligibility criteria may vary across programs, and across academic years. These programs will be reviewed periodically to ensure that they continue to support the University's enrollment goals. Both resident and nonresident undergraduates will be eligible to receive funds under this program, with award amounts differing due to the difference in tuition for these groups of students. For programs where need is a consideration, use of the FAFSA or ORSAA data will also be considered in determining award eligibility.

## REDUCED TUITION BENEFIT FOR ACADEMIC AND CLASSIFIED EMPLOYEES

This benefit is also known as the “staff rate” privilege.

*Rates:* The family/staff rate for employees is 30% of resident undergraduate tuition and this rate applies to only the first 12 credits per term. For undergraduate students, the rate is applied to the tuition table attached to their tuition status (tuition cohort, continuing student or non-admitted student). For a graduate student, the rate is applied to the most recent (undergraduate) tuition cohort tuition table. Above 12 credits, the student is assessed at the full “each additional credit” published on the tuition table attached to their tuition status (tuition cohort, continuing, graduate, non-admitted). Differential tuition is exempt from the family/staff rate. Under this benefit, there is no tuition plateau for employees using the staff rate for graduate courses; there is no tuition plateau at any campus for employees, family and dependents, or retired staff.

**Fees:** Charges for mandatory enrollment fees do not apply for employees using the benefit; nor are employees entitled to health services or incidental fee services through this program. No Application Fee is required for employees and no other deposit is required when registering for classes. Other fees such as lab or course fees are assessed at the full rate and no discount is provided.

**Employee Eligibility:** On approval of the president or designee and with the concurrence of the employee's immediate supervisor, employees appointed at half-time (.5 FTE) or more are eligible. To qualify for this fee, the employee must meet these eligibility criteria no later than the first day of classes of the term of enrollment.

For purposes of this benefit, the term "employee" may include persons with full-time courtesy appointments who provide a benefit to the University in the form of teaching, research, or counseling, under the direction of the University and using the facilities of the University.

Retired employees and employees on leave are eligible for staff fee privileges. Subject to the approval of the President or designee of the teaching institution, the maximum credit limitation may be waived for retired employees and for employees on leave. See exception under Senior Citizen Tuition.

Employees on furlough or lay-off status may be eligible for staff fees in accordance with provisions of a collective bargaining agreement.

The staff fee is not available to temporary classified employees or student employees, including Graduate Employees (GEs).

**Institutional Eligibility:** The benefit may be used at any Oregon four-year public institution. Employees who use the staff fee for courses away from their home institution are subject to staff fee policies and procedures of the instructing institution.

**Excluded UO Programs:** Staff fees are not applicable to self-support courses or to courses in excluded UO programs. Excluded programs are determined at the discretion of the President and the notice of exclusion must be filed with Human Resources office prior to the first day of registration for a term. 2022-23 excluded programs are:

1. Self-support courses
2. School of Law – J.D. Program
3. School of Law — Conflict and Dispute Resolution (CRES)
4. School of Law — LLM Degrees
5. School of Journalism and Communication – Portland Program — Strategic Communication Masters
6. School of Journalism and Communication – Portland Program — Multimedia Journalism
7. School of Journalism and Communication – Advertising and Brand Management Program
8. Applied Information Management (AIM) — This program is ending and is covered by the self-support exclusion.
9. Clark Honors College – Differential Tuition Only
10. Lindquist College of Business – Sports Product Management Program
11. Lundquist College of Business – Oregon Executive MBA Program
12. Lundquist College of Business – Master of Finance Program
13. Lundquist College of Business – Undergraduate differential tuition

14. College of Design – Sports Product Design Program
15. Knight Campus – Industrial Internship Program
16. Online Psychology Master’s Program

*Auditing:* No tuition shall be assessed to courses enrolled in by employees with a grading option of ‘audit’. Attendance under such condition must be with the instructor’s consent and on a space-available basis. The University maintains a record of the courses audited. Courses approved for audit by the instructor confer no credit to the student, are not charged the staff fee rate or regular tuition, and may be used in addition to courses taken using the staff fee privilege during a term. However, any applicable course, lab, or material fees associated with auditing for-credit classes will be assessed by the institution and is the responsibility of the employee. This provision cannot be subdivided in conjunction with the Reduced Tuition Benefit for Family Members and Domestic Partners of Employees.

## **REDUCED TUITION BENEFIT FOR FAMILY MEMBERS OF EMPLOYEES**

To improve the recruitment and retention of high-quality faculty and staff, the staff fee privilege may be transferred to a qualified family member such as a spouse, domestic partner, or dependent child, on a limited basis. Only one (two, if the staff member is unclassified and meets the conditions outlined below) staff member, spouse, domestic partner, or dependent may use the staff fee benefit per term or semester. The benefit may not be subdivided among family members during a single term.

To qualify for this benefit, both the family member and employee must meet the eligibility criteria below no later than two weeks prior to the first day of classes of the term of enrollment.

*Rates:* The family/staff rate for family members of employees is 30% of resident undergraduate tuition and this rate applies to only the first 12 credits per term. For undergraduate students, the rate is applied to the tuition table attached to their tuition status (tuition cohort, continuing student or non-degree student). For a graduate student, the rate is applied to the most recent (undergraduate) tuition cohort tuition table. Above 12 credits, the student is assessed at the full “each additional credit” published on the tuition table attached to their tuition status (tuition cohort, continuing, graduate, non-degree). Differential tuition is exempt from the family/staff rate. There is no tuition plateau for a family member using the staff rate for graduate courses.

*Fees:* The family member to whom the benefit is transferred is responsible for all mandatory enrollment fees in addition to laboratory/course fees, late fees, and registration fees, if applicable. Breakage and/or other mandatory application deposits are required of the participating family member to register for classes.

*Employee Eligibility:* The staff fee privilege may be transferred to a qualified family member of an employee appointed at half-time (.5 FTE) or more, not including temporary classified employees, Graduate Employees (GEs), or other student employees. Employee eligibility is verified through Human Resource Information System records. The transfer of staff fee benefits is not available for retired employees. Eligibility of employees on furlough or lay-off status is subject to applicable collective bargaining agreements.

***Family Member Eligibility:*** Qualified family members include the eligible employee's spouse, domestic partner, dependent children, and dependent children of domestic partners in accordance with IRS Code 152 and Section One of the Public Employees Benefit Board.

***Second Family Member Eligibility:*** Unclassified employees who meet the eligibility criteria and who are using the staff fee for the undergraduate education of a dependent child are entitled to a second, concurrent staff fee privilege for another dependent child to attend undergraduate programs only at the University of Oregon. The terms and conditions (i.e., rates, fees, eligibility requirements, credit limits, and excluded programs) are the same as under the Tuition Benefit for Employees and for Family Members.

***Institutional Eligibility:*** The benefit may be used at any Oregon four-year public institution. Family members who use the staff fee for courses away from the employee's home institution are subject to staff fee policies and procedures of the instructing institution.

***Excluded UO Programs:*** See "Reduced Tuition Benefit for Employees" above.

***Auditing:*** No tuition shall be assessed to courses enrolled in by the Family Member with a grading option of 'audit'. Attendance under such condition must be with the instructor's consent and on a space-available basis. Institutions are required to maintain a record of the courses audited. Courses approved for audit by the instructor confer no credit to the student, are not charged staff fee rates or regular tuition, and may be used in addition to staff fee privileges during a term. Any applicable course, lab, or material fees associated with auditing for-credit classes will be assessed by the institution where the coursework is taken and is the responsibility of the family member. This provision cannot be subdivided in conjunction with the Reduced Tuition Benefit for Employees.

## GRADUATE EMPLOYEES

Graduate students appointed by the University as Graduate Employees (GEs), including as graduate teaching assistants, graduate research assistants, and graduate administrative assistants, are paid at established institutional salary rates and are exempt from the payment of tuition at the University up to the first 16 credits per term. Appointment as a GE may not be for less than .20 FTE for the term of appointment.

The tuition will be assessed to the employing department within the University, not to exceed the graduate resident, full-time student tuition per term. When a GE is authorized to exceed 16 credits per term, the University shall charge the GE the resident overload tuition for the excess credits that correspond to their major's tuition schedule. GEs are exempt from payment of tuition and of fees for self-support courses that are required for the completion of the degree for up to 16 credit hours taken in any quarter to which the appointment applies.

GEs are assessed mandatory enrollment fees, a portion of which is subsidized by the institution during each term.

Students with academic-year GE appointments may be eligible for a summer tuition waiver if they meet the criteria outlined on the Graduate School website.

## RESIDENT OREGON SENIOR CITIZEN PROGRAM

The Senior Citizen Program is designed for Oregon resident senior citizens, age 65 or older. Seniors may register to attend class as an auditor at no tuition charge on a space-available basis, and with the permission of the offering department. Participants must pay any required course fees. Classes taken under this program do not offer credit and cannot be counted toward a degree. If credit is sought, tuition and fees, as well as charges for special materials or fees, if any, will be assessed according to applicable tuition schedules and records will be maintained. Self-support classes are excluded from this benefit and Incidental Fee services are not available.

## AUDITORS

A student enrolled in a combination of for-credit and audit courses will be assessed for the total hours under the tuition and fee schedule, inclusive of for-credit and audited courses, appropriate to that individual's course or student level. If enrolled for audit courses only, the student will pay the same required fees as assessed for similar hours of for-credit classes.

## UNIVERSITY/SCHOOL PARTNERSHIP CO-PAY PROGRAM

School districts having contracts with the University to supervise educator professionals preparing for Oregon licensure may exercise these provisions.

### *Earning the Co-Pay*

For each permissible activity provided under contract with a cooperating district, a district earns a co-pay privilege to register any licensed educational professional employed by the district at the University co-pay fee rate. The rate should be one-third of the tuition charged for the course. Institutions with current contractual obligations may elect to defer compliance of the rate until expiration of the existing contract.

A "co-pay privilege" allows one individual to register for up to 8 quarter credit hours in the term it is used. The total reduced fee credits awarded for practica and student teaching may not exceed 11 in a year, per each University student provided services by the district.

Supervised full-time student teaching: Co-pay privileges of 5 credit hours may be awarded for supervision of the final full-time student teaching per quarter. Student teaching is the culminating, full-time supervised teaching experience provided for students completing a program approved by the Teacher Standards and Practices Commission, leading to Initial Licensure in one or more of four authorizations: Early Childhood, Elementary, Middle, and High School; and specialty endorsements.

Experiential preparatory practica or part-time student teaching: Co-pay privileges of 3 credit hours may be awarded for supervision of students in experiential preparatory practica or part-time student teaching per academic quarter. These are practica assigned to or required of the student prior to or

concurrent with student teaching and block practica and/or other miscellaneous practica offered by colleges and divisions of education for students completing a program approved by the Teacher Standards and Practices Commission, leading to Initial Licensure in one or more of four authorizations: Early Childhood, Elementary, Middle, and High School; and specialty endorsements.

#### *Redeeming Reduced Fee Credits*

Earned co-pay privileges must be used by a licensed educator professional employed by the school district within five successive academic quarters (including summer session) following the quarter in which the supervision is provided, after which time the co-pay privilege is void.

The co-pay fee is applicable only up to 8 credit hours in any academic quarter for any one licensed educator professional, including summer session, even though the district may have earned two or more enrollment privileges, or if the licensed educator professional using the privilege enrolls for fewer than 8 credits.

Unused portions of an enrollment privilege may not be carried to another term or used by another teacher.

A co-pay privilege may be used during any academic term (including summer session) at the University to the extent that it has a teacher preparation program. The University may enter into "partnerships of trade" with any sister institution if they are willing to accept vouchers from other institutions.

The University may set limits on courses available for those redeeming vouchers/co-pays (for example, courses in summer session, distance education, continuing licensure, continuing/extended education). Each institution will indicate on the voucher the existence of restrictions.

The co-pay privilege may also be redeemed by an administrator, counselor, or other licensed educator professional in a cooperating district.

#### *Other Provisions*

##### *Fees*

If a licensed educator professional using a co pay privilege registers only for credits at the reduced tuition rate, mandatory enrollment fees do not apply and health services, incidental fee services, or PE and Rec Center membership services are not provided through this program. Other fees such as lab or course fees are assessed at the full rate and no discount is provided.

Licensed educator professionals using a co pay privilege who register for credits in excess of the number of credits approved for a reduced tuition benefit are responsible for all mandatory enrollment fees in addition to laboratory/course fees, late fees, and registration fees, if applicable. Breakage and/or other mandatory application deposits are required of the licensed educator professional.

Each institution may, at its discretion, extend to the eligible district licensed educator professional other privileges such as use of the institution library, access to campus parking, and admission to campus

events at faculty and staff rates, provided that such extended privileges do not exceed the benefits made available to the faculty and staff of the institution.

## OTHER REMISSION PROGRAMS

The University may create individual fee remission programs to address enrollment management and financial aid program needs.

- *Awards:* Awards may vary in amount but cannot exceed the total cost of education.

## FEE POLICIES SPECIFIC TO SUMMER SESSION

The summer refund policy for course load reduction or withdrawal differs from the academic year policy; the policy can be found at <https://brp.uoregon.edu/content/Tuition-and-Fees>.

## REFUNDS, WAIVERS, AND ACCOUNTS RECEIVABLE POLICIES

### Refund Policies

Refund policies for course load reduction or withdrawal are subject to University policy and procedure. Refunds may be granted to students in accordance with the refund schedule at <https://brp.uoregon.edu/content/Tuition-and-Fees>.

### Military Duty Refund Policy

Any student service member or National Guard member with orders to report for active military duty may withdraw at any time during the term and receive a full refund. If sufficient course work has been accomplished and the instructor feels justified, the instructor may either grant credit for the course work completed and assign a grade or arrange for the student to take an incomplete. In either of these cases, no refund will be given. The student may use a combination of these options.

### Waiver of Certain Student Fees

Certain student fee charges may be waived when regulations of federal agencies or contract agreements preclude the assessment of those fees. Please contact the University's Business Affairs Office to determine which fee charges are eligible, if any, for this waiver.

### Institution Authority to Adjust Charges

The President or designee may make tuition refunds and waive fines or charges that result from circumstances beyond the student's control or are for the best interest of the institution.

## **Revolving Charge Agreement**

The University of Oregon has adopted a policy establishing a Revolving Charge Agreement. Transactions covered by the agreement may include (by way of description and not limitation) tuition, fees, residence hall room and board charges, and other obligations primarily involving students, including fees, fines, and penalties, incurred by anyone.

## **Interest on Overdue Accounts**

The University charges simple interest on the total due amount not paid within the grace period. The annual rate is 9 percent. The periodic rate of interest is .75 percent per month, or fraction thereof, of the unpaid total due balance remaining on the account as of the tenth of the month.

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## **Agenda Item #8**

### **Internal Audit and Shared Business Services**

Date: February 22, 2022

To: Executive and Audit Committee  
Board of Trustees, University of Oregon  
From: Leah Ladley  
Chief Auditor, University of Oregon  
Re: March 2022 (Quarterly) Board Report

The accompanying board report includes the following items:

- Open Recommendations Memo
- Status of Open Recommendations
- Audit Progress Memo
- Audit Progress
- Department Staffing

New Developments:

Administrative: Early in 2022, the Office of Internal Audit (OIA) began the transition to join the Finance and Administration Shared Services (FASS) supported units for Business Operations and Human Resources. FASS will provide the OIA support for budgeting, contracts, accounting services, human resources tasks, and other routine business administrative functions. Due to the Executive Assistant vacancy, these duties have been shared between the Associate IT Auditor and the Chief Auditor. We look forward to engaging with FASS in this collaborative endeavor.

Software: As mentioned previously, our audit management software is approaching end-of-life and will no longer be supported. In conjunction with Purchasing and Contracting Services, our procurement has been posted and we will review proposals soon, partnering with the Information Security Office as we review the vendors for security and functionality.

Risk Assessment: We are encouraged that the pandemic that has gripped the world for the most recent two years appears to be lessening in both severity and impact. As such, we are supplementing our current risk assessment practices with more traditional activities and welcome input from the Board and Executive Leadership. Internal audit Standards provide guidance of the appropriateness of reliance on the mature Enterprise Risk Management (ERM) risk assessment. As such, we leverage the ERM assessment as compiled and monitored by Safety and Risk Services with other higher education internal audit activities and our own custom interviews with the UO community to develop our audit plan. Your input is encouraged so that our assurance helps you achieve your objectives for UO.

IT Project: In anticipation of the Associate IT Auditor's upcoming leave, Baker Tilly will take the lead on a review of Phase I of the Transform IT project. The objective will be to assess the completeness of the phase and identify any gaps related to IT assets or service coverage.

Date: February 22, 2022  
To: Executive and Audit Committee  
Board of Trustees, University of Oregon  
From: Leah Ladley  
Chief Auditor, University of Oregon  
Re: Status of Open Recommendations

Attached you will find the Status of Open Recommendations. This report is provided to you each quarter to provide visibility into completed and open recommendations.

There are no recommendations for which communication has not occurred.

New Developments:

Three recommendations are closing this quarter.

Multiple target completion dates have been revised. Currently, (45%) the 'owner' is no longer at UO or has transitioned into a different role at the university. As such, delays have resulted from vacancy and limited capacity. As these transitions occur, internal audit begins communicating and collaborating with new leadership and often resets the target completion dates.

Management continues to respond to audit recommendations and provide status updates when requested.

Ongoing Reminders:

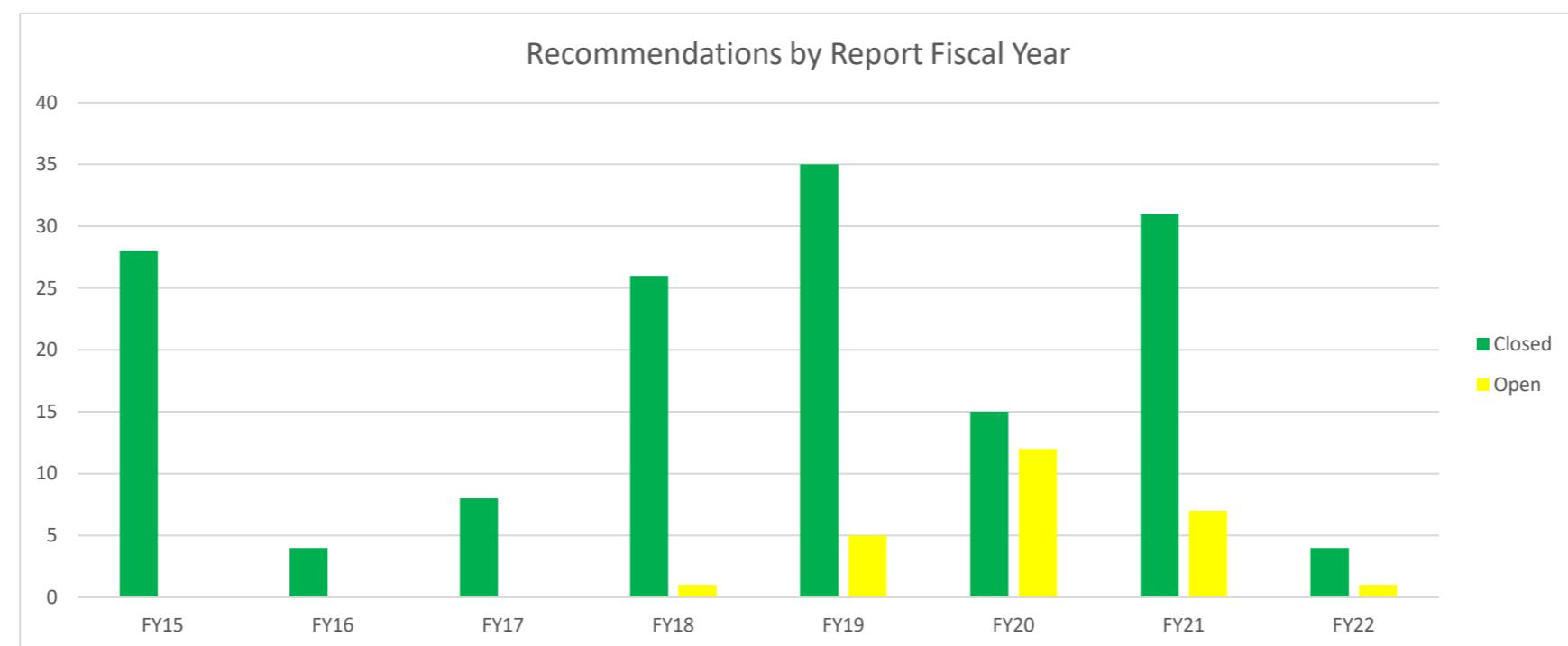
The previously agreed-upon risk ratings have been incorporated into the Open Recommendations report. In particular, two audits represented herein include ratings. Over time, management will implement the unrated recommendations and that portion of the table will no longer be reported. University ratings are provided to assist you in your governance over internal audit recommendations.

In order to provide the most relevant information, projects will no longer be listed in this schedule once all recommendations have been implemented. All previously reported recommendations are represented as open or closed in the graphical representation at the bottom of the schedule.

Projects with Open Recommendations	Report Date	Total Recommendations		Previously Closed	Closing this Quarter	Open Recommendations	
Unrated Recommendations:						Open and Due	Not Yet Due
Lab Safety Practices	5/25/2015	8		7	1		
Electronic Proposal Clearance System (E-PCS)	2/7/2018	4		3		1	
Athletics IT Risk Assessment	11/19/2018	7		4	1	3	
GLBA Compliance	6/27/2019	4		2			2
Health Center IT Risk Assessment	8/13/2019	6		1			5
Non-Retaliation Policy	8/30/2019	2		1		1	
Data Governance	3/4/2020	3					3
Physical-to-Cyber Security Assessment	6/5/2020	3					3
NCAA Compliance Review	7/22/2020	24		22	1		1
Vendor Review	8/11/2020	6		3			3
OPURP (Moss Adams)	5/4/2021	3		1		2	
SUBTOTALS					3	7	17

Projects with Open Recommendations, with Ratings:	Report Date	Total Recommendations			Previously Closed	Closing this Quarter	Open (and Unit Rating)	
Rated Recommendations	Report Date	University High (H)	University Med. (M)	University Low (L)			Open and Due	Not Yet Due
Undergraduate Admissions	11/16/2020			3	2		L	
UHS Limited Review	7/27/2021			2		2		
2021 NCAA Football Attendance Certification	2/8/2022			1				M
SUBTOTALS						2	3	1
TOTALS						5	10	18

Since the December 2021 meeting, management has implemented 5 recommendations.



Date: February 22, 2022  
To: Executive and Audit Committee  
Board of Trustees, University of Oregon  
From: Leah Ladley  
Chief Auditor, University of Oregon  
Re: Audit Progress

Included in your materials you will find a report detailing Audit Progress which includes the works completed this fiscal year, active works, and an audit projection for upcoming projects.

Updates to Audits:

- Completed: 2021-2022 Lindeleaf Scholarship Eligibility Verification
- Completed: 2021 NCAA Football Attendance Certification
- Adding: Transform IT, Phase I
- Adding: Active Directory Review

Other projects continue to progress through the audit cycle of identification, planning, fieldwork, reporting, and ultimately follow-up (if recommendations are made).

As we continue to acclimate our new team members to the internal audit methodology and process, you will begin to see an increased number of audits completed. Thank you for your patience.

As always, we appreciate your understanding of the need to revise audit projections as internal requests are received, risks emerge in areas not-as-yet identified, and controls are identified during planning stages that may be so strong as to preclude further evaluation.

Other audit activities are not represented here, such as: investigations, committee participation, risk assessment, follow-up activities, campus integration and education, and participation in audits originating outside of internal audit (financial statement audits and others).

PROJECT	IDENTIFIED	PLANNING	FIELDWORK	REPORTING	REPORTED
Early Childhood (EC) Cares					7/15/2021
University Health Services (UHS) Limited Review					7/27/2021
<b>TIER I</b>					
AY22 Lindeleaf Scholarship Eligibility Verification					12/20/2021
2021 NCAA Football Attendance Requirement					2/8/2022
UOPD Firearms Inventory			X		
Stipend and Course Relief Review		X			
HEERF Process Review		X			
Export Controls Review		X			
Contract Compliance (Limited)		X			
QA Self-Assessment		X			
<b>TIER II</b>					
Procurement Cards	X				
Travel Compliance	X				
Student Billing and Accounts	X				
<b>WITH BAKER TILLY AND/OR IT AUDITS</b>					
Advancement Data Security Review				X	
Banner 9 Security Review			X		
Education and Community Support (ECS) NIST Gap Analysis		X			
Data Center Review	X				
Transform IT Review, Phase I Only	X				
Active Directory	X				

# Department Staffing



## OTHER:

- Co-Sourced IT Audit Services (as contracted)
- Co-Sourced/Out-Sourced Audit Services (as contracted)
- Audit Intern (currently vacant)
- Student Program (currently on-hold)

\*The Associate IT Auditor is currently filling the gaps left by the Executive Assistant vacancy.

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## Board of Trustees Meetings

### March 2022

1

## OIA Quarterly Highlights

### • Open Recommendations

- 5 recommendations closing
- New target dates have been agreed upon, often due to unit vacancy
- Units remain responsive and engaged

### • Operations

- Associate IT Auditor approaching leave
- Baker Tilly to provide IT audit coverage
- Recently-hired audit staff are being trained and are gaining experience through various methods

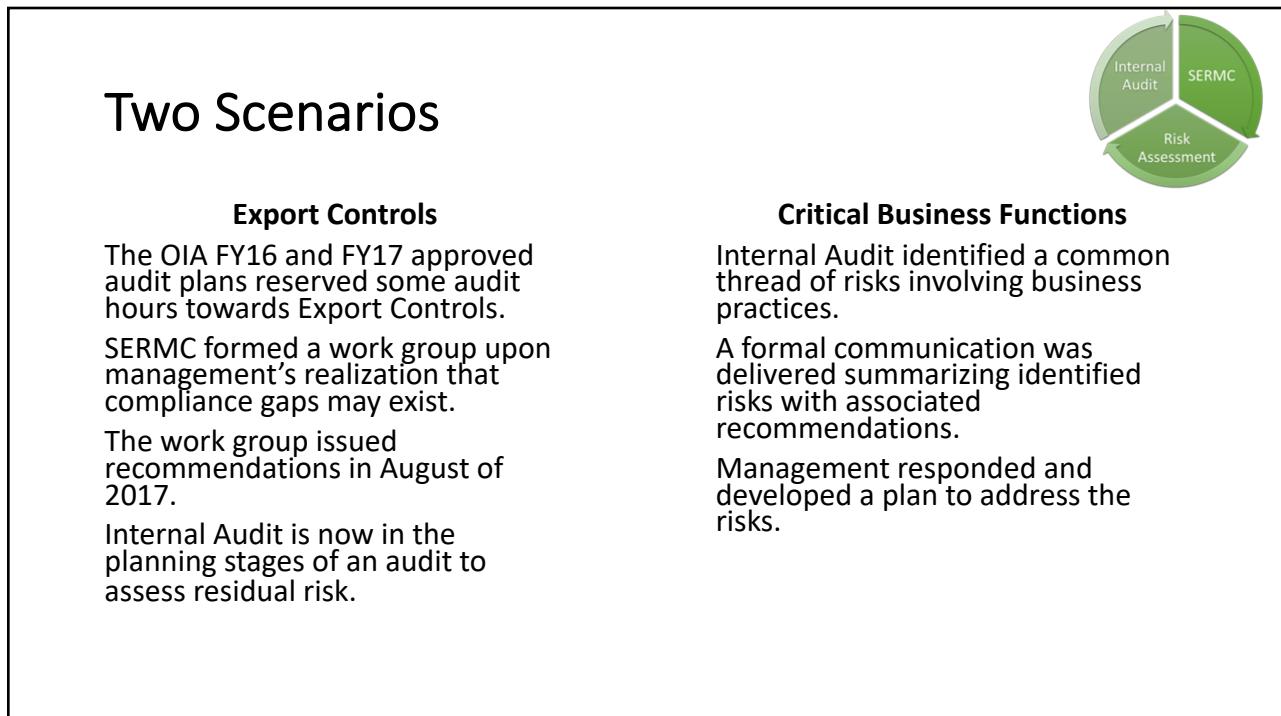
### • Audit Progress

- 2 audits finalized
- Progress being made on audit projects
- IT projects are being identified and added

2



3



4

February 28, 2022

Dear Trustees,

We are pleased to share that we have completed the third phase of the Business Practices Project as outlined in our November 2021 Memo (see below for background). Over the last year, we have worked with dozens of portfolios to help support their efforts to improve their business practices and address the risk issues identified by Internal Audit. We will be sharing an overview of this project with you during the March Board meeting. Included in this packet for your review are the summary reports of operations and transition plans provided by each portfolio documenting how they are adapting business practices, as of February 2022. As you will see, some of the work is still under way; however, we have made tremendous progress over the last year. We look forward to discussing this important initiative with you.

Mike Schill, President

Patrick Phillips, Senior Vice President and Provost

Jamie Moffitt, Vice President for Finance & Administration and CFO

**To:** Board of Trustees, University of Oregon  
**From:** Mike Schill, President  
Patrick Philips, Senior Vice President and Provost  
Jamie Moffitt, Vice President for Finance & Administration and CFO  
**Re:** Update on Business Practices Project  
**Date:** November 17<sup>th</sup>, 2021

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## Background

### Audit Memo

In January 2018, after conducting several audits of business functions at the university, the Office of Internal Audit provided university leadership with a memo outlining several systemic risks they had observed at the institution, resulting from our highly decentralized structure for processing business transactions.

These risks included:

- The significant delegation of authority to local levels
- The lack of data necessary for decision-making and monitoring by oversight functions, including questions regarding the quality of existing data
- The absence of accountability necessary in a highly decentralized environment
- The assignment of responsibilities not always being aligned with necessary skills
- Individuals being assigned “a myriad of additional responsibilities,” especially in smaller departments, which contributes to additional risk and/or operational efficiency
- The Office of Internal Audit noted that they had growing concern over the systemic nature of these issues and the overall impact that they have on university personnel, financial management, and accountability.

### Management Response

In response to the memo from the Office of Internal Audit, we developed a three-phase approach to address the issues raised. The plan included the following actions:

1. The Office of Internal Audit conducting a diagnostic audit to map out the types of business services across the university (i.e., which departments utilize shared services organizations vs. business offices vs. single “office manager” models)
2. University leadership launching a Business Practices Task Force to discuss the findings of the audit memo and the diagnostic audit and to develop options and recommendations for addressing the identified risks
3. University leadership reviewing the Business Practices Task Force recommendations and developing an implementation plan for addressing the risks identified in the audit

### *Phase One: OIA Diagnostic Audit*

In November of 2019, the Office of Internal Audit completed the diagnostic audit of critical business functions. The objective of the audit was to conduct a high-level inventory of where and how business processes were performed across the University. The audit report included an inventory of how business processes were performed (i.e., through shared services operations, business offices or individual unit personnel) in various areas of the institution, as well as identification of associated risks.

The audit recommended that senior leadership and management assess the current structure, processes and controls regarding business functions to ensure key themes and risks were addressed. It further recommended that a consultative structure be used for this assessment.

#### *Phase Two: Business Practices Task Force Work*

In January of 2020, a cross-functional task force was launched to discuss and analyze how business practices are conducted at the University and provide recommendations for changes the institution could implement to address identified risks. The task force concluded its work in August 2020 and developed a framework of recommendations.

Primary recommendations included the establishment of the following:

- Institutional support for the further development of Regional Shared Services Hubs to provide business services to campus
- More standardized business processes, workflows, and technological tools and systems that support business services
- Clearer and more consistent accountability structures for business service staff
- Increased training and support

#### *Phase Three: Implementation Plan*

There has been considerable organic growth of Regional Shared Services Hubs across the campus. These “regional hubs” provide consolidated business services, work closely with central functions, but organizationally report within their client portfolios. Examples include the Finance and Administration Shared Services department, the Central Business Services Office serving the School of Journalism and Communication, the College of Design, and the Honors College, and Advancement Operations, which serves both the Advancement and Communications portfolios. Despite the general movement in this direction, each effort to organize individual hubs was in the past done independently. Today other portfolios are also considering creating shared services organizations – however, each group is working on these issues individually.

Given the Business Practices Task Force recommendations and the university context in terms of emerging Regional Shared Services Hubs across campus, University leadership decided to focus on two key initiatives to address the risks identified in the audit:

- Launch of network and expertise groups for major business processes in Regional Shared Services Centers.
- Focused Institution Wide Strategic Planning Initiative around Development of New Regional Shared Services Hubs

These two initiatives are discussed in more detail below.

#### **Launch of Network and Expertise Groups**

In winter 2021, four functional groups were formed around key business processes. Comprised of professional staffing from existing regional hubs, the groups came together with relevant central experts to identify best practices for working with clients, share business processes used in the hubs, discuss technology platform requirement, explore gaps in policies and procedures, and consider training needs. These groups formed around the following focus areas: Regional Service Center Hub Directors; Business Transactions; Human Resources; and Purchasing and Contracting. In summer 2021, an additional group formed to look specifically at best practices related to Grants Administration. The groups have begun their work and have also been a resource for portfolios looking to establish new regional shared services hubs on campus.

## **Institution-Wide Business Practices Project**

In spring term 2021, we launched an institution-wide planning effort around further development of regional business hubs, designed specifically with the following goals:

- Address risks identified in the audit related to the University's decentralized structure related to business transactions
- Improve our business processes and practices, particularly in terms of efficiency and effectiveness
- Improve support for local clients

The business practices project was structured around three key phases, as follows:

- Phase One: Portfolio diagnostic
- Phase Two: Assessment of strategic options
- Phase Three: Implementation plan Phase

### Phase One: Portfolio diagnostic (April-August)

In April 2021, a series of project launch meetings were held for portfolio heads across campus, including Vice Presidents, Vice Provosts, and Deans. Following these meetings, portfolios were provided with data on their business transactions as well as tools to complete quantitative, qualitative, and staff mapping assessments. The assessment tools were designed to help portfolios examine how they were providing business services, and to help them identify strengths and areas for improvement. The business practices project webpage was also launched in April (<https://vpfa.uoregon.edu/uo-business-practices-project>), providing a project overview, the purpose and goals of the project, reference documents, and success stories from other regional business hubs around campus. In May, a series of workshops were held that provided training on the regional business hub model. In July and August, individual meetings were held with each portfolio to review their quantitative, qualitative, and staffing assessment findings. At the end of Phase One, portfolios with robust business practice teams were triaged out of the process. The majority of portfolios continued to work with the project team in Phase Two.

### Phase Two: Assessment of strategic options (September-November)

During Phase Two, portfolios received a list of critical questions to consider when evaluating different business service structures. Portfolios also received resources developed by the network and expertise groups on best practices and considerations for implementing or improving regional business hubs. Consultations with the project team were provided during August and October, and individual meetings with each portfolio were held in November to review strategic options under consideration.

### Phase Three: Implementation plan (December-March)

During Phase Three, each portfolio will be consulting with business practices experts and developing implementation plans to either facilitate the transition to regional business hubs, or to improve their current business practices. At the end of Phase Three, a project report will be submitted to the Board of Trustees including a summary of the operations and transition plans for each portfolio.

# Final Reports by Portfolio

<b>Section 1: Summary of Progress by Portfolio/Unit .....</b>	<b>5</b>
<b>Section 2: Academic Administration .....</b>	<b>6</b>
College of Arts and Sciences (CAS).....	6
Information Services .....	9
Lundquist College of Business .....	10
School of Law .....	11
Provost's Shared Services Initiative: OtP Colleges Organizations.....	12
Provost's Shared Services Initiative: OtP Administrative Units .....	18
<b>Section 3: Institutional Administration .....</b>	<b>21</b>
Advancement and Communications .....	21
Athletics .....	24
Division of Equity and Inclusion (DEI) .....	25
Division of Student Life.....	27
Knight Campus for Accelerating Scientific Impact .....	29
Office of the President .....	30
Student Services and Enrollment Management (SSEM) .....	31
VP Finance and Administration .....	33
VP General Counsel.....	35
VP Research and Innovation.....	36

## Section 1: Summary of Progress by Portfolio/Unit

# Portfolios Forming New Regional Business Hubs

Portfolios/Units	Pre-Project	Post-Project Strategic Structure
College of Arts & Sciences (CAS)	45 departments; decentralized business services with staffing at the local unit level	CAS standing up shared service center (SSC) and 8 academic support units (ASUs)
Office of the Provost – Schools and Colleges	8 Schools and colleges; most have independent business services with local staff; CBSO (regional hub) formed with some financial services for Design, College of Ed, and Honors College	Central Business Services Office (CBSO; regional hub) expanding to include Human Resources services and to also serve Journalism, in addition to Design, College of Ed, and the Honors College
Office of the Provost – Admin Units	Information Services, Undergraduate Education, Libraries, Global Engagement, and others; each have local business support	Administrative business hub being formed to serve all Provost admin units; Information Services moving to F&A portfolio and receiving support through FASS (regional hub)
Student Life	Major auxiliaries (EMU, PE & Rec) have separate business teams; Student Life started forming hub to serve other units	Student Life business hub expanding to serve all Student Life departments, including auxiliaries
Student Services and Enrollment Management	Fiscal and HR services handled decentrally	Student Services and Enrollment Management centralized business and travel team being formed
VP Research and Innovation	Shared business hub for central research functions; centers and institutes mainly have decentralized support	Beginning to develop shared regional hub structure for centers and institutes

# Portfolios Joining Existing Regional Business Hubs

Portfolios/Units	Pre-Project	Post-Project Strategic Structure
Division of Equity and Inclusion	Business services for division managed by VPEI office staff	Moving business support to Student Life regional shared services business hub
Office of the President	Business services supported by office staff in various offices	Moving business support to Finance and Administration shared services hub (FASS)
Information Services	Business services managed by local staff	Moving business support to Finance and Administration shared services hub (FASS)
VP General Counsel	Handled by staff in Purchasing and Contracting Services (PCS) and Office of General Counsel (OGC)	<ul style="list-style-type: none"> <li>• Moving business support to Finance and Administration shared services hub (FASS)</li> <li>• PCS to retain contracting (partners with FASS to provide contracting support to FASS clients)</li> <li>• OGC to retain legal contracting and legal invoice processing</li> </ul>

# Portfolios with Existing Robust Business Offices / Hubs

Portfolios	Pre-Project	Post-Project Strategic Structure
Advancement & Communications	Business hub services both portfolios	Adding HR functions and improving regional hub governance structure
Athletics	Central business/human resource services provided to over 50 sport programs and administrative units	Continuing to enhance efficiencies and improve services to all internal and external stakeholders
College of Business	Two central administrative units: Fiscal Services and Faculty Support	Enhanced HR-payroll integration and improved cross-training opportunities
Knight Campus	Centralized Knight Campus business operations team provides all business services	Improving training and orientation materials for shorter onboarding timelines
Law School	Centralized business services	Improved incorporation of Foundation information
VP Finance and Administration	Business hub (FASS) established in 2016; provides services to majority of Finance and Administration departments	<ul style="list-style-type: none"> <li>• Working with HR on enhanced Recruitment Partner workflows</li> <li>• Providing services to President's office, General Counsel's office, Purchasing and Contracting, and Information Services</li> </ul>

## **Section 2: Academic Administration**

### **Report submitted by: College of Arts and Sciences (CAS)**

#### **Section A: Please answer both questions**

1. How were business services provided in your portfolio in spring 2021 when the project launched?

Business services for the 45+ departments and programs within the College of Arts and Sciences have been provided in a decentralized manner with staffing located at the local unit level. In a few areas, business services to multiple departments/program has been provided by a team of employees, but in most areas, business services are localized and staffed at varying levels depending on size and complexity of the unit.

2. What changes are you currently planning / implementing to improve services and address the risks identified in the [audit report](#)?

Creation of a CAS shared service center (SSC) and eight academic support units (ASUs). The SSC will be the main business hub for CAS. It will be staffed with professionals focused on particular functions (fiscal, human resources, research support), and be managed by professionals in each area resulting in application of consistent business practices. Professional development and training for staff will be streamlined and more equitably delivered in both the SSC and ASU. Cross-training to ensure continuity of service when there is staff departure or leaves is also a critical objective. Workflows and standard operating procedures are being developed to ensure efficient and effective processing, as well as the implementation of control points to ensure accountability and delegation of tasks.

#### **Section B: Please answer either question 3 or question 4**

3. If you are moving to a new regional business hub structure:

- a. Describe the target organizational structure

A combined structure which includes a shared service center (SSC) and an academic support unit (ASU) structure. The SSC will initially include three areas of business services:

- i. Fiscal – including but not limited to procurement, payables, travel, report generation
- ii. Human Resources – including but not limited to payroll, hiring, onboarding, visas
- iii. Research Support – general administration

The eight ASU hubs will serve as the connection between departments/programs and the SSC. The ASUs will support unit specific work that cannot be supported at the SSC. Some examples of this work are (not an inclusive list):

- i. Strategic partnership with the department/unit head
- ii. Promotion/Tenure/Reviews
- iii. General faculty support
- iv. Budget management

- v. Undergraduate program support
- vi. Graduate program support
- vii. GE management

- b. Share the current projected implementation timeline

The launch date for the SSC and ASU is fall 2022, with optimization planned to be complete by fall 2023. At that point all new processes should be seen as “business as usual.” (See [CAS Timeline](#).)

- 4. If your current business services structure is working well, please describe how the risks identified in the [audit report](#) are currently addressed?

*Not relevant.*

### **Section C: Optional**

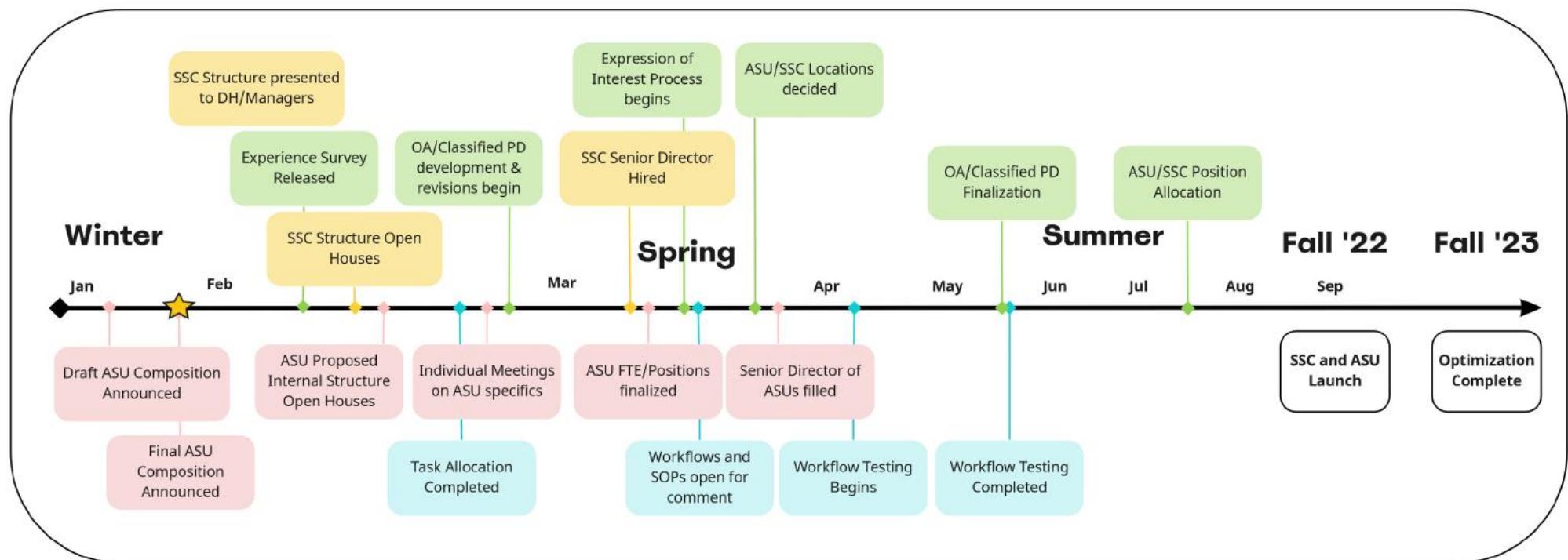
- 5. Please share any other information about your plans to ensure that your portfolio provides effective and efficient business services. This may include collaborations, training, and workflow enhancements with University-wide offices such as University HR.

A strong collaboration with HR is critical for this initiative to succeed. Therefore, the Steering Committee for the project is working closely with HR on the personnel impacts this initiative will have including but not limited to position descriptions, supervisor reassignment, searches (internal and external), and other reorganization aspects. Additionally, for those roles tied to HR services, we are incorporating the professional competencies as defined by HR into the PDs (position descriptions). The SC will also be working closely with HR on trainings and professional development for staff to ensure they have the abilities needed if taking on a new role in this initiative.

Specific work tied to employee relations (in particular around performance management) is being placed into Senior Director roles, and class/comp position(s) are being included in the SSC structure.

As standard operating procedures and workflows are completed, it is anticipated that those will also improve communications and processing outside of CAS with centralized UO Offices (i.e. Travel and Payroll).

## CAS Shared Services Timeline



## **Report submitted by: Information Services**

### **Section A: Please answer both questions**

1. How were business services provided in your portfolio in spring 2021 when the project launched?

Business services were provided through the embedded finance team (Manager and three staff) and one HR specialist.

2. What changes are you currently planning / implementing to improve services and address the risks identified in the [audit report](#)?

Finance and HR services will be migrated to being supported through FASS beginning March 2022.

### **Section B: Please answer either question 3 or question 4**

3. If you are moving to a new regional business hub structure:
  - a. Describe the target organizational structure
  - b. Share the current projected implementation timeline

Finance and Administration Shared Services (FASS) is comprised of 45+ employees whom provide department level administrative support across 3 business areas (Business Operations, Human Resources, Specialized Information Technology). FASS will begin supporting Information Services business and human resources needs throughout the winter/spring of 2022, with full support being provided by July 1, 2022. Existing IS staff will be integrated into FASS and FASS organizational structure will adjust to account for the additional employees and workload. The current teams within FASS that will work with Information Services include the purchasing, accounting, finance & budget, payroll and Human Resources groups.

4. If your current business services structure is working well, please describe how the risks identified in the [audit report](#) are currently addressed?

*Not relevant*

### **Section C: Optional**

5. Please share any other information about your plans to ensure that your portfolio provides effective and efficient business services. This may include collaborations, training, and workflow enhancements with University-wide offices such as University HR.

## **Report submitted by: Lundquist College of Business**

### **Section A: Please answer both questions**

1. How were business services provided in your portfolio in spring 2021 when the project launched?

Business services for the Lundquist College of business are provided almost entirely by staff in two central administrative units (Fiscal Services and Faculty Support) under the supervision of the dean's office.

2. What changes are you currently planning / implementing to improve services and address the risks identified in the audit report?

Centralized administrative structure is being enhanced by creation of a director-level role responsible for HR under supervision of Associate Dean for Finance & Administration to replace the human resources specialist. With this hire, we are undertaking a review of HR and payroll processes to better integrate with fiscal operations, streamline, and increase reliability. We are also exploring cross-training opportunities, the balancing of workflow to ensure that back-ups are available when needed, and with staffing turnovers, reviewing budget authorities and signatures to ensure the proper flow, review, and approval of transactions in all units.

### **Section B: Please answer either question 3 or question 4**

3. If you are moving to a new regional business hub structure: *Not relevant*.
4. If your current business services structure is working well, please describe how the risks identified in the audit report are currently addressed?

Staffing levels currently allow for adequate separation of duties in creation and authorization of transactions. Supervision of employees entering transactions and authorization of transactions is performed by administrative unit directors with adequate knowledge of UO policies and relevant applicable laws. The college develops detailed budgets with internal operational units, which are reviewed and approved at Dean's office level. Operational directors receive timely reports on their performance relative to these budgets. Reports are base on reliable information originating from Banner or UO Foundation.

### **Section C: Optional**

5. Please share any other information about your plans to ensure that your portfolio provides effective and efficient business services. This may include collaborations, training, and workflow enhancements with University-wide offices such as University HR.

We are planning an initiative to better document our internal policies, processes and practices to enhance the transparency and continuity of our business operations. This will include the development of standard operating procedures, the update/buildout of additional resources for budget managers and supervisors on Lundquist Bizweb, and, as mentioned above, cross-training.

## **Report submitted by: School of Law**

### **Section A: Please answer both questions**

#### **1. How were business services provided in your portfolio in spring 2021 when the project launched?**

The Law School has centralized business services to support the various units, clinics, programs, and centers within our portfolio. These services include business transactions, purchasing and contracts, human resources, and grant administration. We have adequate staff to have proper separation of duties for business functions. Our staff is cross-trained to be able to handle situations in short-term absences. This structure allows the Law School to develop subject-matter expertise, making us efficient and able to partner with central university offices.

#### **2. What changes are you currently planning / implementing to improve services and address the risks identified in the [audit report](#)?**

The primary area where the Law School is improving is finding ways to incorporate foundation information more efficiently for easier management. By doing so, the Law School is able to present budget holders with general, foundation, and grant fund information in a simpler, more streamlined monthly report. Working with central partners, the Law School would benefit most from implementing a time entry system that removes double entry and manual signature routing. This change would create efficiencies and improve the quality and consistency of our data.

### **Section B: Please answer either question 3 or question 4**

#### **3. If you are moving to a new regional business hub structure: *Not relevant*.**

#### **4. If your current business services structure is working well, please describe how the risks identified in the [audit report](#) are currently addressed?**

The Law School's centralized structure and separation of duties is working to address the risks identified in the audit report. Having professional staff with subject-matter expertise as well as a workflow that requires at least two checkpoints for data consistency and accountability are the most noteworthy in our current business services structure. Our staff has been able to develop reports necessary for effective decision-making. We also reconcile our data to the official system of record to ensure accurate data.

### **Section C: Optional**

#### **5. Please share any other information about your plans to ensure that your portfolio provides effective and efficient business services. This may include collaborations, training, and workflow enhancements with University-wide offices such as University HR.**

The Law School continues to serve on University-wide committees and projects to keep our portfolio effective and efficient. We have representation on the HR Advisory Team, the Officers of Administration Job Family Framework (OAJFF) project, Record Retention, Travel Consultants, Department Grant Administrators (DGA), HR Partners, Business Managers, Academic CFOs, and Academic Finance and Operation Teams (AFOT).

**Report submitted by: The Office of the Provost**  
**Provost's Shared Services Initiative: OtP Colleges Organizations**

**PREAMBLE**

The Business Practices Project was originally launched with communications directed (within the Provost portfolio) at the level of Deans and Vice Provosts. It was only later that this approach was corrected and the Project was lifted to the level of the Provost. Within the Provost's portfolio we have 8 Schools and Colleges, forming the *academic portfolio* and a substantial number of administrative units, including the Provost's office itself, forming the *administrative portfolio*.

Once the Project changed focus, the Provost made several decisions. One such decision was to have several separate projects and, specifically, to separate shared services between academic units and administrative units. Within the academic portfolio:

- The College of Arts and Sciences would continue to work on its own central services project. CAS will report separately on their progress.
- The extant financial shared services unit (CBSO) within the College of Design, serving Design, Honors College and Journalism, would be moved to the Provost's office, expanded to include Human Resources, and would serve some additional units in the academic portfolio.
- Some of the academic units needed only minor adjustments to their business practices to conform to the Business Practices Project.

Within the administrative portfolio:

- Information Services would move all appropriate business transactions to the VPFA's business services unit: FASS.
- All of the remaining units in the administrative portfolio would move appropriate business transactions (financial and HR) into a new Central Business Services Office.

It must be noted that the Provost's office has been carrying out this work during a very challenging time. Staff shortages across the administrative portfolio have necessitated the use of personnel to cover both administrative and academic business transactions, with several people asked to perform substantial overloads and several units expected to be very patient and flexible. These challenges have made the shared services planning and transition more difficult, while at the same time emphasizing the resiliency of a shared services structure.

Other than this Preamble, this document will deal only with the Provost's academic portfolio, less the College of Arts and Sciences. CAS will report separately.

**Section A: Please answer both questions**

1. How were business services provided in your portfolio in spring 2021 when the project launched?

The following schools and colleges had central business offices reporting up to a CFO (reporting directly to the Dean): Business, Law, and Education. Law does not have departments and the departments in Business are not separately organized (within banner) from a financial or HR point of view. The College of Education created its central business office several years ago (FY18), pulling business transactions out of

its several departments. In all cases, these offices handle both financial and HR transactions, but not always grant-related business activities.

The School of Music and Dance was recently reorganized to incorporate the Bach Festival, which was previously in the Provost's office. As of spring 2021, business services for the Bach Festival were still separate from the rest of the School, but work was under way to integrate all of the business functions into one area, under the School's CFO.

The remaining three units: College of Design, School of Journalism and Communication, and Honors College were already partially integrated at the transactional business level. Within Design, the Central Business Service Organization (CBSO, established in FY17) provided financial transaction work to SOJC, Design and HC (primarily payroll). HR transactional work remained distributed across these units. Like Business, the departments in SOJC are not separately organized in banner. Honors College is very small and all business operations report directly through the CFO. With the CBSO in place, all financial transactions were consolidated into a single business office reporting to the CFO, but HR transactional work was still somewhat distributed in the college.

It should be noted that by the end of spring 2021, staffing challenges across the Provost's portfolio were already severe. The CBSO and several individuals were asked to pick up transactional work for several other units, including Division of Graduate Studies, Undergraduate Education and Student Success, Museum of Natural and Cultural History.

2. What changes are you currently planning / implementing to improve services and address the risks identified in the [audit report](#)?

The Schools of Business and Law already have business service and control structures that are compliant with the audit report. No immediate changes are necessary.

The School of Music and Dance has mostly completed its integration of the Bach Festival and will soon have a single business office reporting appropriately to their CFO, who reports to the Dean. A planned expansion of the extant CBSO is underway. First, the CBSO will move from Design to the Provost's office and combine with parts of the business services office of the College of Education. This new unit will serve Design, Education, Honors College and SOJC. In addition, the new unit will expand to include HR services for those four units. The operational and governance structure of this new unit and the services it will provide, have been extensively discussed and planned with the leadership of the four units (Deans and CFOs) and with Central Human Resources.

Two notes about the services the CBSO will provide (for the time being): The CBSO will not provide grant-activity based services, nor will it do budgets for the various Schools and Colleges. Unit-level budgeting is too closely aligned with academic planning to be centralized.

The CBSO continues to provide some services to several administrative units. We plan to phase that out as quickly as possible, as a new structure for administrative business processes is put in place for the administrative portfolio (see separate report). When all of these planned changes are complete, the seven

units covered by this report should have business structures fully compliant with the suggestions of the audit report. Moreover, several efficiencies and improvements to services will have been achieved – not only within the units, but centrally as well.

Finally, we leave open the possibility that one or more of the units SOMD, LAW or Business may, at a later date, have their business services units integrate with the newly expanded academic CBSO. This would primarily be a question of efficiency and improvement to services, rather than compliance or controls.

### **Section B: Please answer either question 3 or question 4**

*(Clearly these instructions are not compatible with this report. We will address both questions.)*

3. If you are moving to a new regional business hub structure:

- a. Describe the target organizational structure

The expanded CBSO will be a general-fund budgeted operation that operates as a distributed shared service organization. It will not be a service center.

By and large, current UO employees who will be pulled into the CBSO will not need to move from their current locations. The new CBSO will have several new HR professionals, who will be distributed amongst the Schools and Colleges.

The structure described here is not unlike the current distributed shared service structure utilized by Information Services to provide basic IT services across campus.

The organizational structure of the new CBSO, and its reporting structure, is summarized in the attached org chart.

- b. Share the current projected implementation timeline

The planned expansion of the new CBSO has been moving forward since May 2021. The primary shift of org structures (moving pieces from both COE and Design into the Provost's office) should be complete by the end of spring term, 2022. However, full implementation of the structure and the services it is meant to provide may be delayed by difficulties with hiring. We will also need to be very flexible with timing as the current CBSO continues to help provide services to several administrative units, and the administrative shared services planning somewhat lags the academic side.

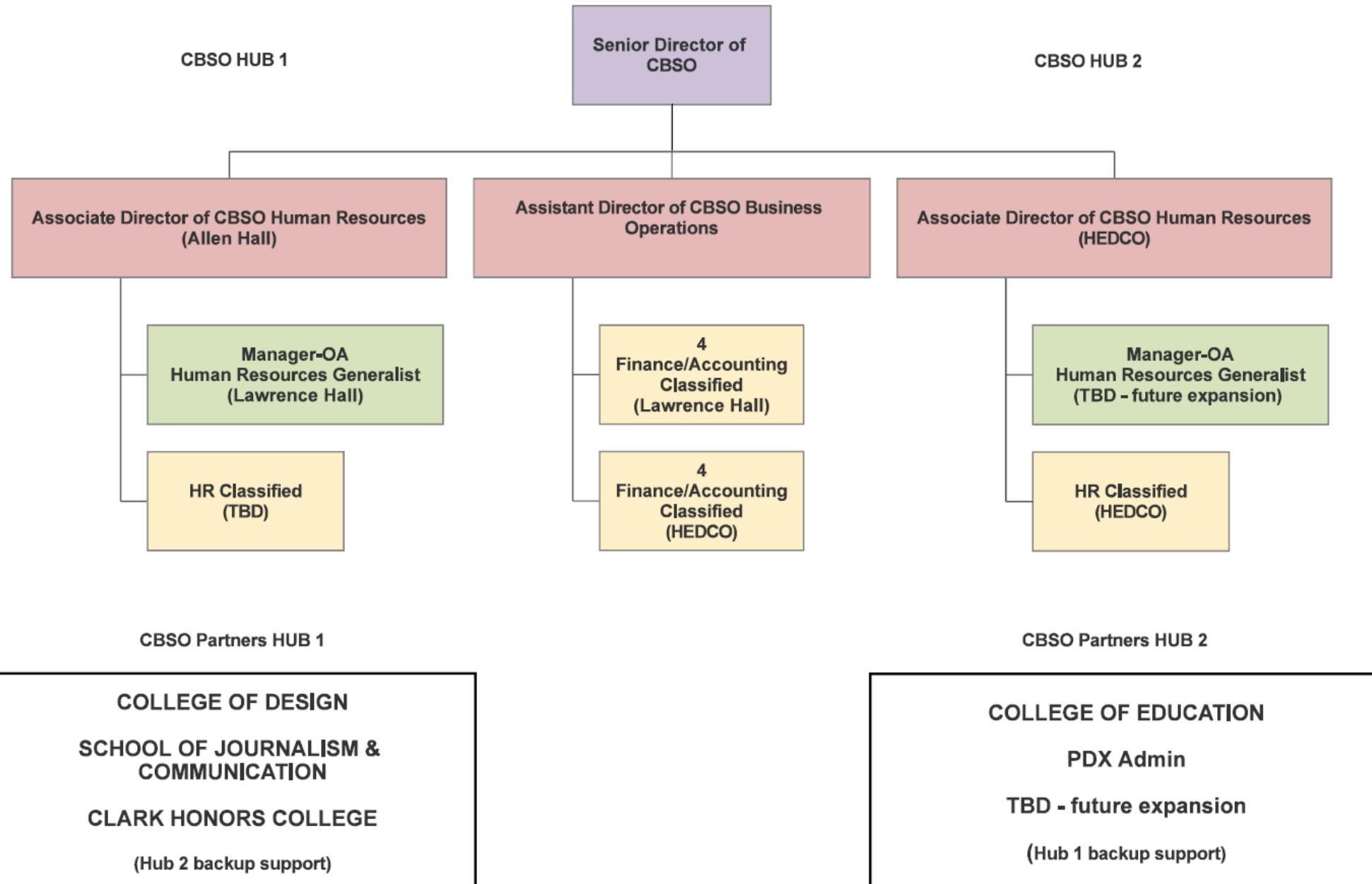
That said, all open and new positions are already posted, and searches are on going with some key positions already filled. A ticketing system has been identified and is being incorporated into the current CBSO. A general Service Partner Agreement (SPA) document is completed, and each unit is currently working on their SPA addendum to address specific unit needs. We anticipate all addendums to be completed during the winter term.

4. If your current business services structure is working well, please describe how the risks identified in the [audit report](#) are currently addressed?

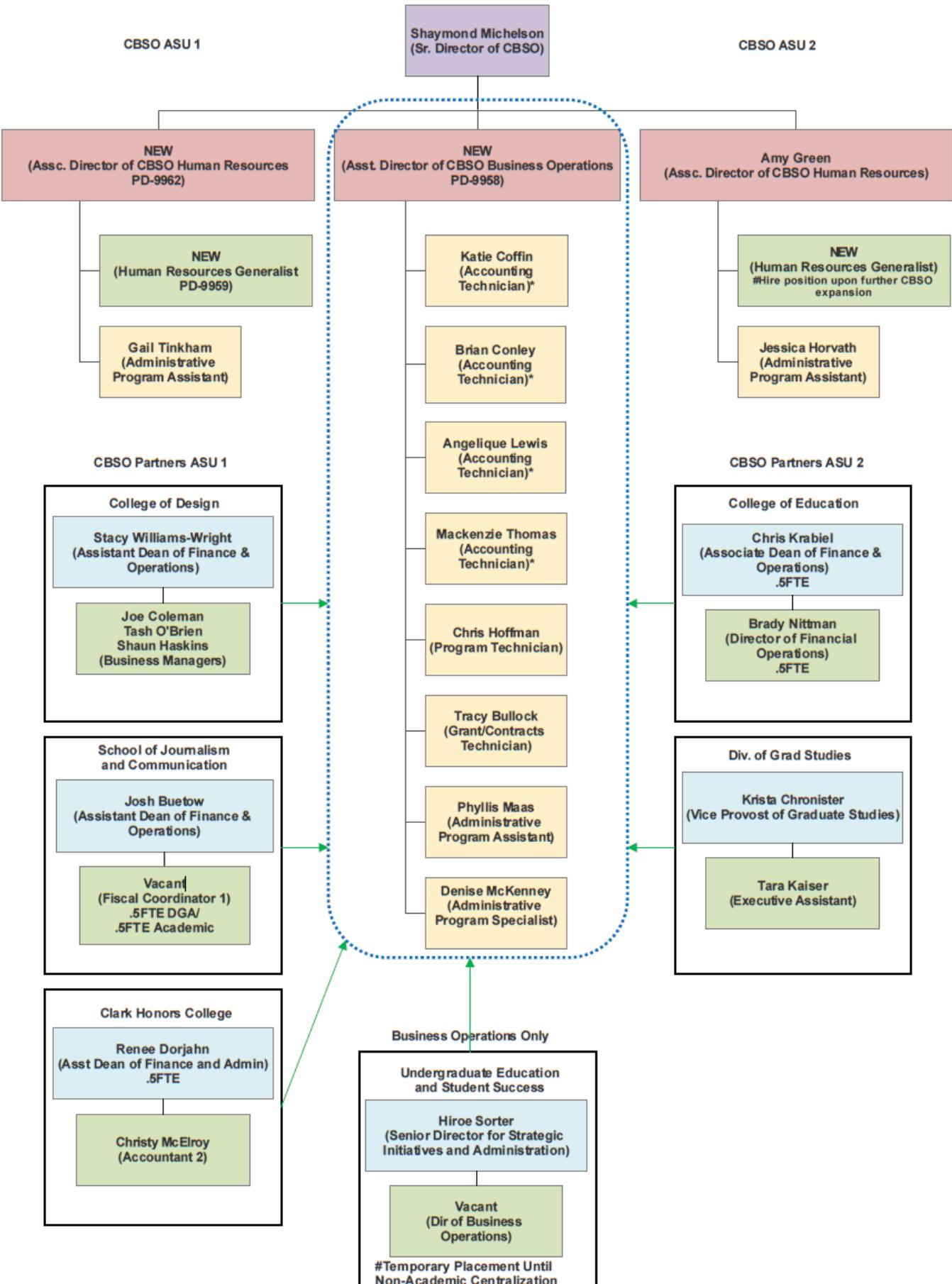
As already stated: Law and Business have central business offices with appropriate reporting and controls. It is possible that these structures could be more efficiently organized if they were integrated into the CBSO, but that is not clear and is a question for another day.

The School of Music and Dance, when they have completed their integration of the Bach Festival will have the appropriate control structures in place.

## Provost's Shared Services Initiative: CBSO Organizational Chart (condensed)



## Provost's Shared Services Initiative: CBSO Staff Org Chart



\*Accounting Technician's are proposed to reclassify to Program Technician 1

**Report submitted by: The Office of the Provost**  
**Provost's Shared Services Initiative: OtP Administrative Units**

**PREAMBLE**

The Business Practices Project was originally launched with communications directed (within the Provost portfolio) at the level of Deans and Vice Provosts. It was only later that this approach was corrected and the Project was lifted to the level of the Provost. Within the Provost's portfolio we have 8 Schools and Colleges, forming the *academic portfolio* and a substantial number of administrative units, including the Provost's office itself, forming the *administrative portfolio*. The administrative portfolio includes 7 primary administrative functions units: Division of Global Engagement (DGE), UO Portland (PDX), the Libraries (LIB), Undergraduate Education and Student Success (UESS), the Graduate School (GS), Information Services (IS) and the Office of the Provost (OtP); as well as smaller units inside OtP: two Museums (MNCH and JSMA) and multiple small units (TEP, LERC, Military Science, Support for Student Athletes, Wayne Morse Center).

Once the Project changed focus, the Provost made several decisions. One such decision was to have several separate projects and, specifically, to separate shared services between academic units and administrative units. Within the academic portfolio:

- The College of Arts and Sciences would continue to work on its own central services project. CAS will report separately on their progress.
- The extant financial shared services unit (CBSO) within the College of Design, serving Design, honors College and Journalism, would be moved to the Provost's office, expanded to include Human Resources, and would serve some additional units in the academic portfolio.
- Some of the academic units needed only minor adjustments to their business practices to conform to the Business Practices Project.

Within the administrative portfolio:

- Information Services would move all appropriate business transactions to the VPFA's business services unit: FASS.
- All of the remaining units in the administrative portfolio would move appropriate business transactions (financial and HR) into a new Central Business Services Office.

It must be noted that the Provost's office has been carrying out this work during a very challenging time. Staff shortages across the administrative portfolio have necessitated the use of personnel to cover both administrative and academic business transactions, with several people asked to perform substantial overloads and several units expected to be very patient and flexible. These challenges have made the shared services planning and transition more difficult, while at the same time emphasizing the resiliency of a shared services structure.

Other than this Preamble, this document will deal only with the Provost's administrative portfolio.

## **Section A: Please answer both questions**

### **1. How were business services provided in your portfolio in spring 2021 when the project launched?**

Traditionally, the primary units in the administrative portfolio have each had a single central business office. There are large differences in business type, financial structures, human resource needs, and mission across these units. Some units (e.g. UESS) are almost exclusively funded through general fund, whereas some units additionally have substantial grant and contract funds (e.g. MNCH), large designated operations (e.g. DGE) or service centers (e.g. IS). All of the units have some component of their operation directly connected to teaching or research. Given all this, and the basic decentralized culture of the university, it has always been difficult to imagine these units sharing business services. However, the institution has changed. Centralized data reporting and data integration, centralized human resource processes and policies and other standardizations all contribute to a new landscape in which basic transactional business services, no matter the fund type, the business type or the employee type, are better handled in a standardized and professional manner. Aggregation of transactions is more efficient and generates better service levels.

As of spring 2021, the traditional business service structures across the administrative portfolio were still in place, but we were seeing the beginnings of some breakdowns in those services. This was, clearly, COVID-related and caused by ever-increasing shortages of personnel across the units, as well as rapid turnover in positions at all levels. IS experienced a complete turnover in HR staff (and had to turn to FASS for assistance). Financial services in several units needed to be shored up through the use of the Design-based CBSO and the use of other personnel from the Colleges. The Library became substantially understaffed and needed to find a new Finance Director (whom they hired from PDX, thereby transferring the staffing problem to another unit – a phenomenon that has been very common on campus in the past year). MNCH has not had adequate DGA support for their moderate grant portfolio.

Staffing shortages did help to make clear some systemic problems across the administrative portfolio: FTE fragmentation and single points of failure. These are exactly the kinds of problems that are addressed with shared service units – but these can also be the problems that amplify barriers to creating shared services.

While these staffing issues have not improved much in the last year, we have managed to sustain most business services at adequate levels. The key ingredient has been sharing personnel across units.

### **2. What changes are you currently planning / implementing to improve services and address the risks identified in the [audit report](#)?**

The Provost's current plan for shared services across the administrative portfolio is ambitious and timely. Some parts of the plan are well under way, other parts will require substantially more planning and change management. But already the leadership of the various primary units have been engaged and show a positive attitude towards change.

The plan is simple: Information Services will move their primary business operations, both financial and HR to the VPFA's shared business services unit FASS. The remainder of the administrative units will

coalesce some or all of their business services into a new Administrative Central Business Services Office (ACBSO – although final name to be determined).

While the plan is simple, the change management implementation is not. Moving IS to FASS is all but complete and should be done by the end of this term. Creating the ABCSO and transitioning the various units' business offices into it appropriately will likely require another year.

Within the Provost's office, we have seen great benefit from certain types of standardization, for example, the standardization of tenure-line faculty offer letters and standardization of thrice-annual financial check-in reporting. The ACBSO will allow us to standardize many elements across the administrative portfolio: PDs (position descriptions), HR forms, financial reporting, etc. The ACBSO will allow us to defragment FTE and remove single points of failure, create smoother and faster pathways through central HR (such as providing well-trained individuals who can help with class, compensation and OEPA—Oregon Equal Pay Act—analysis), and, with the help of a ticketing system, analyze, improve and adjust business workflows.

#### **Section B: Please answer either question 3 or question 4**

3. If you are moving to a new regional business hub structure:
  - a. Describe the target organizational structure

Like the CBSO described in the academic version of this report, the ACBSO will be a distributed shared service operation (DSSO) that handles both financial and HR transactional work, with some higher-level professional HR support. Staff in the ACBSO will be distributed throughout the units, but report up through the structure of the ACBSO. This is similar to the Information Technology support structure currently utilized across our campus. However, the ABCSO will also likely include some employees who have more narrowly defined (yet widely utilized) roles. Examples might include Foreign Travel or GTFF Labor Relations. The ABCSO will require a robust governance structure, but we already have working models of such structures on campus (in IT, the CBSO, and FASS).

- b. Share the current projected implementation timeline

Conversations with unit leadership have been ongoing since fall term as well as conversations with Central Human Resources. In January, the primary units received beginning documentation and a Zoom meeting was held on February 3 to launch a task force to create the ACBSO. That task force will engage with the Service Partnership Agreement (SPA) in February, a critical step in understanding what services each unit will be receiving and a necessary step to formalizing an org chart. After that, we can begin to post key positions, such as Senior Director and several human resources positions.

The timeline will advance as the SPA is completed, positions are filled, and an initial organizational structure comes together. Units will be moved into the ACBSO one at a time, not all at once or at a rapid pace. The OtP Administrative units currently served by the CBSO will remain there as long as there is need and/or until the ACBSO is ready. Once again, we will leverage the work already created through the academic CBSO along with other shared service organizations on campus.

## **Section 3: Institutional Administration**

### **Report submitted by: Advancement and Communications**

#### **Section A: Please answer both questions**

##### **1. How were business services provided in your portfolio in spring 2021 when the project launched?**

Business services were provided fully for University Advancement with an Advancement Operations team, a department designed with specialists to provide excellent service and address the complexity and unique volume of the work related to government and community relations, fundraising, and supporting the UO Alumni Association (a separate 501(c)(3)). The Advancement Operations team has regularly been considered strong in policy compliance, risk management, and structural effectiveness by peers on campus and leaders within the VPFA division. Business services had been specialized starting in 2013 for University Communications and were involved in the centralization effort. In 2021, business services to University Communications (UC) were provided upon request by Advancement Operations (UA), but were in need of an update due to leadership transitions, emerging needs, and the opportunity to build a shared mission between UA and UC.

##### **2. What changes are you currently planning / implementing to improve services and address the risks identified in the [audit report](#)?**

University Advancement and University Communications are in step to align current, high talent staff to form a jointly administered shared services team that provides core budgeting, contract, compliance, HR practices, and employee relations services. The leaders in each area will be charged with revising and refining processes and workflows to better partner with both divisions. Core considerations will be taken to define and communicate the threshold of action and ownership required by leadership and supervisors in each division for continuing to address the audit's identified areas of compliance and risk management. Additionally, we will be building clear intake and customer service practices to provide service, accountability, and turnaround that goes beyond core risk management but also addresses emerging business needs for both divisions.

#### **Section B: Please answer either question 3 or question 4**

##### **3. If you are moving to a new regional business hub structure:**

- a. Describe the target organizational structure**
- b. Share the current projected implementation timeline**

We are moving towards an adapted regional business hub structure. This structure will be defined by:

- Participation in decision-making and performance evaluation by both Advancement and Communications leaders.
- Strong partnership, training, and best practice sharing with relevant UO central programs.
- Regular customer service feedback and needs assessment to inform improvements and identify new needs.

- Updated workflows and communication practices to build transparency in process and create clear expectations and ownership for supervisors and leaders.
- Consistent investment and staffing to adequately address the distinct, complex needs of these divisions; support and grow our operations professionals; and avoid burnout and turnover.

Our current timeline is as follows:

- **Work completed to date:**
  - Interim assignment, with plan for permanent role for lead staff member for HR practices. Budget planning and organizational structure planning for full HR team, including cross-training and specialized training with central HR.
  - Internal change management with operations teams and planning with Chiefs of Staff.
  - Review of internal communications and drafting of new formats for updates and staff reintroductions.
  - Evaluation and initial workflow breakouts related to equipment and technology services to both divisions in transition as a result of Transform IT.
  - Hiring of temporary staff to address urgent overflow and overload of teams, especially Financial Services.
  - UC internal surveying of leadership team on previous service and upcoming needs.
- **February-April 2022:**
  - Definitional work of core services to both divisions, identification of immediate needs.
  - Drafting and hiring of secondary HR role.
  - Continued training of lead staff member for HR practices by central HR.
  - [re]introduction of employee relations services to University Communications.
  - Introduction of lead staff member for HR practices to UC. Training completion and permanency of the role and assignment are confirmed.
  - Discussion and diagnosis of UC and UA needs related to budgeting, reporting, and additional services.
  - Reassignment of payroll team and function to shared services.
  - Evaluation of continued impact from the Transform IT initiative and shift of the IT team of 4 FTE to User Support Services (USS). Definition of USS services and gaps to be filled by shared services or within advancement.
  - Internal team management and update of communications channels and branding.
  - Broader UA and UC communications to managers and colleagues on services and intake process.
  - Confirmation of budget and investment to make interim and temporary new staffing levels permanent as appropriate and as budget allows.
  - Definition and outline for future practices of service evaluation, feedback, and shared performance management.
- **Spring-Summer 2022:**
  - Initial pilot of service evaluation and priority setting between both divisions.
  - Continued clean-up of workflows and process effectiveness across shared services team.

- First cycle of intentional performance management support, robust budget planning, and shared business practice feedback and evaluation for both divisions under the new model.
- Operations team change management, value building, and vision setting.
- Continued evaluation of relationship and service needs related to technology, equipment, and specialized software and platforms.
- Drafting and evaluation of MOU and service agreement.

- **FY23 and Beyond:**
  - Continued evaluation of services, service agreement, and needs of both divisions.
  - Evaluation and consideration of additional scope and services for expansion.
  - Continued investment in training, collaboration, and responsibility sharing and handoffs from central business affairs and HR offices.

4. If your current business services structure is working well, please describe how the risks identified in the [audit report](#) are currently addressed?

*Not relevant.*

### **Section C: Optional**

5. Please share any other information about your plans to ensure that your portfolio provides effective and efficient business services. This may include collaborations, training, and workflow enhancements with University-wide offices such as University HR.

Our shared service model's success will be dependent on the continued training, partnership and permissions granted to specialists within the business practice areas from University HR, Purchasing and Contracting and Business Affairs. Without these permissions and partnerships the business practices teams will be unable to provide support, accountability and turnaround that will meet the needs of both divisions. Of particular impact will be the ability of the shared service HR practices team to be trained and trusted to review and process requests related to classification and compensation.

Another core consideration is the aftermath of the transition of an IT team to USS, which has left a gap in bandwidth for IS to provide core services to the divisions, particularly in the areas of building and meeting technology, software and service management, and data strategy and risk management.

## **Report submitted by: Athletics**

### **Section A: Please answer both questions**

1. How were business services provided in your portfolio in spring 2021 when the project launched?

The Athletics Business Office (ABO), in conjunction with the Human Resource (HR) unit, provides centralized business services to approximately fifty (50) sport programs and administrative units throughout the Athletics Department including but not limited to Finance and Budget, Purchasing and Contracting, Accounting Services, Payroll Services, Human Resources, Risk Management, Travel, Property Control, IS (PCI-compliance), Treasury Management, and Financial Reporting. The ABO collaborates with the respective University business and administrative units as appropriate in managing athletic department business activities.

2. What changes are you currently planning / implementing to improve services and address the risks identified in the [audit report](#)?

The ABO actively participated on the Business Practices Task Force and Shared Business Processes Team in helping to provide feedback and guidance for the UO Business Practices Report. While no changes are currently planned, the ABO continually works through the appropriate University unit, strives to enhance efficiencies and improve overall service to all internal and external stakeholders.

### **Section B: Please answer either question 3 or question 4**

3. If you are moving to a new regional business hub structure:

- a. Describe the target organizational structure
- b. Share the current projected implementation timeline

4. If your current business services structure is working well, please describe how the risks identified in the [audit report](#) are currently addressed?

The ABO is structured in a manner that allows for delegation of authority to multiple levels, constant monitoring of data to ensure integrity and consistency, and accountability for all levels throughout the athletics department. As federal, state, local, institutional and NCAA bylaws/rules/regulations/policies/procedures change; the ABO adapts to ensure continuity of operations while maintaining a high level of service. Additionally, the athletic department goes through an annual NCAA required agreed-upon procedures review to help ensure sound financial processes and reporting, in addition to regular internal control and business process reviews by UO Internal Audit.

### **Section C: Optional**

5. Please share any other information about your plans to ensure that your portfolio provides effective and efficient business services. This may include collaborations, training, and workflow enhancements with University-wide offices such as University HR.

The ABO and HR unit collectively will continue to participate in University-wide tasks forces, committees, working groups, etc. to support institutional initiatives.

## **Report submitted by: Division of Equity and Inclusion (DEI)**

### **Section A: Please answer both questions**

#### **1. How were business services provided in your portfolio in spring 2021 when the project launched?**

The Division of Equity and Inclusion (DEI) is comprised of five units – Center on Diversity and Community, Campus and Community Engagement, Center for Multicultural Academic Excellence, the Multicultural Center, and the Office of the Vice President for Equity and Inclusion (VPEI). All business services for the division – including finance and budgeting, purchasing and contracting, human resources, operations/facilities, and travel coordination – are managed centrally by staff within VPEI. This staff includes one full FTE accountant, while the other services are bundled into the duties of partial FTEs of other roles within VPEI. Each DEI unit has a portion of an administrative FTE which works with central VPEI business service staff, and helps to ensure that the business needs of each unit are communicated and followed up on.

#### **2. What changes are you currently planning / implementing to improve services and address the risks identified in the [audit report](#)?**

Like other divisions across campus, DEI has undergone planning to move into a regional shared services business hub in order to take advantage of the dedicated staffing expertise and economies of scale such a model provides. After a review of available options, DEI will partner with the Division of Student Life, which is currently (as of Winter 2022) expanding their current business services hub in order to serve their auxiliary units. For detail on DEI's move to a hub structure, see below in #3.

### **Section B: Please answer either question 3 or question 4**

#### **3. If you are moving to a new regional business hub structure:**

- a. Describe the target organizational structure
- b. Share the current projected implementation timeline
- a. As mentioned above, DEI will be moving to a regional hub structure which will be managed by Student Life. DEI's one dedicated business service FTE (Accountant 1, currently vacant) will move to the hub, and VPEI staff who currently have small, partial business service FTE in their position descriptions (PDs) will balance their duties with programming support and other pressing needs of the division.

The specific services which will move to the business hub will include: all finance, accounting, and budgeting work; purchasing and contracting; and payroll and basic HR transactions (hire paperwork, HRIS maintenance, etc.). Travel coordination and higher-level HR functions, such as performance management, staff recruitment, and PD and class/comp consultation will remain in DEI/VPEI, as the Student Life hub plans to keep many of those higher-touch services at the auxiliary unit level. This works well for DEI, as we have a SHRM-certified HR partner on staff who has considerable knowledge of our work and HR needs.

With regard to governance and collaboration, DEI's Chief of Staff will continue to be the primary administrative lead for the division, and will be the chief point of contact with the Student Life hub,

facilitating strong communication and collaboration between the two divisions. The Student Life hub director will meet regularly with DEI's COS and other leadership as needed, to ensure that DEI's business needs and fiscal priorities are understood and served well, and that DEI staff are successfully transitioning/adapting to the new hub's processes.

b. Student Life is currently in the process of developing their regional hub, starting first with folding in auxiliary units that already fall under their division (but which have their own business service staff). That work entails hiring and onboarding new staff, creating new processes and procedures to meet the needs of the hub members, and leading change management. DEI anticipates starting to formally move services into the hub in summer 2022. (Given DEI's currently vacant accountant position, it is possible that some accounting work may move to the hub more quickly.)

Between now and summer, DEI's Chief of Staff will continue to work with Student Life hub leadership to plan for the transition: documenting and sharing DEI's current budgets, business processes, and priorities; preparing paper and electronic files for transition; reviewing new processes and procedures for applicability or potential adjustment; and change management communications with all staff of DEI.

We expect the transition of business services to be in full swing by fall 2022.

4. If your current business services structure is working well, please describe how the risks identified in the [audit report](#) are currently addressed?

*Not relevant.*

### **Section C: Optional**

5. Please share any other information about your plans to ensure that your portfolio provides effective and efficient business services. This may include collaborations, training, and workflow enhancements with University-wide offices such as University HR.

## **Report submitted by: Division of Student Life**

### **Section A: Please answer both questions**

#### **1. How were business services provided in your portfolio in spring 2021 when the project launched?**

Business services were provided via three main entities: department staff in the EMU (Assistant director and some accounting staff), PE & Rec (Assistant Director and some accounting staff) and the Division of Student Life Financial Services functional area (a director and some accounting staff) which already served as a service center for our general funded units, the VP's office, the Office of the Dean of Students, and the University Career Center.

HR services were similar, with HR staff in EMU and PE & Rec and staff in the Vice President's Office providing HR and payroll support for our general funded units. VP office HR staff include, the Chief of Staff, a HR Manager (who provided direct HR assistance for the three GF units and support where needed in the auxiliaries). Payroll processing for the three general funded (GF) units was handled by a member of the Division of Student Life Financial Services team.

#### **2. What changes are you currently planning / implementing to improve services and address the risks identified in the [audit report](#)?**

All financial business services in the Division are now handled by a centralized financial services team, reporting to the Division's director of financial services. Finance staff have moved from auxiliaries (some vacancies are being filled) to our administrative hub. As work requests flow into the hub via a central portal, they are assigned to a member of the team that will communicate with the requestor in order to complete what is required. There will eventually be additional FTE dedicated to some specific activities, special projects (such as digitizing and standardizing records/retention) and emerging services, such as group/student travel coordination.

The service center's HR team will provide direct service for payroll once we make the transition to UKG/Kronos. For non-payroll HR actions, the service center provides direct services to the GF units and support services to our auxiliaries, who have HR staff. HR staff in auxiliaries have non-HR responsibilities beyond their HR work. Those duties may eventually be provided by staff in the service center, should staffing or needs change. The HR Manager is currently in the process of hiring a payroll technician who will be responsible for the payroll processing, as well as monitoring and routing the HR-related requests in the shared service portal. The structure of the hub will be built in a scalable way as to absorb the HR and payroll needs of the two auxiliaries and any other units if need be.

Our structure is designed to address the inherent risks from:

- Lack of back-ups (i.e. if the one person that "does the work" is out, then the work doesn't get done or must be performed by someone unfamiliar with it)
- Non-standard approaches to budgeting, forecasting, and fiscal planning
- Having employees who handle certain types of activity on only an annual basis, thus do not build the experience necessary to gain mastery
- Maintaining multiple types of incompatible or non-shared reports across each unit

**Section B: Please answer either question 3 or question 4**

3. If you are moving to a new regional business hub structure:

- a. Describe the target organizational structure

PLEASE SEE SECTION C

- b. Share the current projected implementation timeline

Our positions should be filled and our team should be up and running by the end of the fiscal year. In addition, we have agreed to provide business and HR services for the Division of Equity and Inclusion. We will begin that transition in July and should be integrated and operational by September.

4. If your current business services structure is working well, please describe how the risks identified in the [audit report](#) are currently addressed?

**Section C: Optional**

5. Please share any other information about your plans to ensure that your portfolio provides effective and efficient business services. This may include collaborations, training, and workflow enhancements with university-wide offices such as University HR.

We are currently evaluating the impact of taking on DEI (see above) on staffing levels and configuration.

Our anticipated timeline for reaching our targeted business services structure is by July 1, 2022

## **Report submitted by: Knight Campus for Accelerating Scientific Impact**

### **Section A: Please answer both questions**

#### **1. How were business services provided in your portfolio in spring 2021 when the project launched?**

In spring 2021, the Knight Campus had an established, robust and growing team of business operations professionals who provide high quality business support to all of our academic, research, innovation and special program units. The centralized Knight Campus business operations team supports leadership, faculty, students and programs in all areas of HR, finance, purchasing, travel, research administration and academic administration. Overall, we have seen great success in the ability of the business operations team to facilitate a significant volume of support at a very high quality while also scaling and being nimble in an effort to ensure that any gaps are mitigated and addressed in a timely manner. We had a strong continuity plan in place that we have continued to build upon, this includes cross-training, well-documented procedures and strong internal communication channels. This business operations team (hub) has been a successful model for the Knight Campus.

#### **2. What changes are you currently planning / implementing to improve services and address the risks identified in the [audit report](#)?**

The business operations team (hub) has proven to be a successful staffing model that has resulted in the Knight Campus being able to mitigate the risks identified in the audit report. We have dedicated staff who are thoroughly trained to provide support in all business operations functions including HR, accounting/finance, purchasing, travel, research administration and academic administration. The team has developed and documented internal workflows/processes that ensure compliance with UO policies, increase efficiency and business continuity. Additionally we have established appropriate delegations of authority within the team and with Knight Campus leadership. Also, we have cross-trained staff to provide backup coverage for all critical business operations functions further enhancing Knight Campus business continuity.

We have areas for continued improvement related to the rapid growth of the Knight Campus. Hiring, onboarding and training new staff (especially non-internal hires) on UO business practices is challenging and it takes a long time to get staff approved by central to independently process actions and for individuals to get to a sufficient level of expertise and skill on UO specific procedures and processes. We are working to build out our training and orientation materials in ways that we hope will shorten the timeline for getting staff to be successful in practicing compliant business transactions independently at the UO.

### **Section B: Please answer either question 3 or question 4**

3. If you are moving to a new regional business hub structure: *Not relevant.*
4. If your current business services structure is working well, please describe how the risks identified in the [audit report](#) are currently addressed? *Please see response in #2 above.*

## **Report submitted by: Office of the President**

### **Section A: Please answer both questions**

1. How were business services provided in your portfolio in spring 2021 when the project launched?

Through partial FTEs from existing employees who primarily serve other roles.

2. What changes are you currently planning / implementing to improve services and address the risks identified in the [audit report](#)?

We are planning to move to a regional business hub. This will provide better expertise, greater continuity of service, and eliminate risks related to redundancy/back-ups.

### **Section B: Please answer either question 3 or question 4**

3. If you are moving to a new regional business hub structure:

- a. Describe the target organizational structure

We are planning to move to FASS, the regional business hub that has been serving the VPFA portfolio and others for quite some time.

- b. Share the current projected implementation timeline

Some functions are being moved to the hub as soon as January 2022, and the rest of the functions will follow in the next six months.

4. If your current business services structure is working well, please describe how the risks identified in the [audit report](#) are currently addressed?

*Not relevant.*

### **Section C: Optional**

5. Please share any other information about your plans to ensure that your portfolio provides effective and efficient business services. This may include collaborations, training, and workflow enhancements with University-wide offices such as University HR.

We are taking extra measures to be sure that executive-level searches are conducted in a way that meets the unique needs of the President's Office. High-level financial planning may stay within our office. The FASS service hub will be implementing some new procedures for our units, procedures that will ensure better checks-and-balances and accountability.

## **Report submitted by: Student Services and Enrollment Management (SSEM)**

### **Section A: Please answer both questions**

#### **1. How were business services provided in your portfolio in spring 2021 when the project launched?**

Fiscal staff was organized decentrally around the operations of each unit. One person might be splitting their FTE into many tasks, not allowing for collaboration or development of depth of expertise. Redundancies and backups for vacancies and time out of office were often handled by someone from another unit filling in. We had pockets of long-term, highly experienced staff and pockets of vacancies due to the pandemic and the hiring freeze.

HR staff also organized decentrally and always as a portion of someone's position; we have no dedicated HR staff. We have regular access within each department to be able to handle processes such as recruiting or updating position descriptions, but ad hoc requests have required AVP staff and HR team members.

#### **2. What changes are you currently planning / implementing to improve services and address the risks identified in the [audit report](#)?**

We have added an additional Assistant Director of Budget and Financial Administration so that each of the units across the Division have an analyst as a lead contact. Each analyst can address the growing fiscal complexities of multiple sources of funding, increased volumes of student recruitment and enrollment, and the necessity for the growth of cross-unit coordination. To attempt to increase the level of fiscal staffing in each of the affected units under the current model would have been challenging, much more costly, and would not have increased the information flow between units and to the SSEM Central Office.

### **Section B: Please answer either question 3 or question 4**

#### **3. If you are moving to a new regional business hub structure:**

- a. Describe the target organizational structure**
- b. Share the current projected implementation timeline**

The Director and the Assistant Directors are each assigned as lead analysts for several units/departments within the SSEM Division. These are assigned based on the following variables: complexity of the fiscal operations of the unit (multiple fund types, unevenly dispersed activity across the fiscal calendar, etc.), FTE and skill base of fiscal staff within the unit, and the reporting structure of the Division. Consideration of these variables helps to spread the workload evenly; this also provides AVPs in the Division with one Budget and Finance analyst.

This organization of the central office Budget and Finance team allows us to better provide the following fiscal services:

- Increased knowledge, visibility, and fiscal expertise at the level of the VP's office
- Consistent and frequent fiscal reports to unit Director/AVP with narrative, recommendations
- Completion of annual fiscal processes such as Budgeting, Carry-Forward, Fees

- Monitoring of entries/transactions in accounts, indices, organization codes, to produce consistent, timely and correct reporting
- Planning with unit staff for projects, support, and oversight for purchasing and travel strategy, assisting in communication with cross-unit teams

One Assistant Director also supervises the Travel Coordinator, which is now supporting Division-wide travel. This change moves this position out of Admissions to support all recruitment travel, out of any department. This also moves expertise to the central office and offers accessibility to the entire Division. The timeline for this implementation is that these positions have been hired, the second Assistant Director at the end of October 2021, and the Travel Coordinator at the end of December 2021. Each of these positions are completing trainings, building relationships, and gaining experience in their roles.

4. If your current business services structure is working well, please describe how the risks identified in the [audit report](#) are currently addressed?

*Not relevant.*

#### **Section C: Optional**

5. Please share any other information about your plans to ensure that your portfolio provides effective and efficient business services. This may include collaborations, training, and workflow enhancements with University-wide offices such as University HR.

## **Report submitted by: VP Finance and Administration**

### **Section A: Please answer both questions**

1. How were business services provided in your portfolio in spring 2021 when the project launched?

In spring 2021, the Finance and Administration portfolio consisted of 5 major divisions, each with multiple departments. Finance and Administration has a large shared services organization, which in the spring of 2021, served three of its five divisions plus the Office of the Vice President for Finance and Administration. Finance and Administration Shared Services (FASS) provided services to Campus Planning and Facilities Management, Safety and Risk Services, and Campus Services. In 2021, FASS also began providing services to a fourth division in the portfolio, University Human Resources. FASS is a successful shared services organization, with over 40 professional staff, that has been in operation since 2016. The department provides centralized support for travel, accounting, purchasing, payroll, budget, finance, recruitment and labor relations. Additionally, FASS provides specialized support in materials management, logistics, campus mail, and unique technological support for CPFM and UOPD. The fifth division within the Finance and Administration portfolio, the Business Affairs Office, provides business services internally. In February 2022, a reorganization with the Provost's Portfolio resulted in the creation of a sixth major division within Finance and Administration: Budget, Financial Analysis and Data Analytics. We intend to eventually transition business support of this division to FASS.

2. What changes are you currently planning / implementing to improve services and address the risks identified in the [audit report](#)?

FASS is expanding services to provide additional support to units outside of the Finance and Administration Portfolio. This includes Information Services, the Office of the President, the Office of the General Counsel, and Purchasing and Contracting Services. This will improve the redundancy, specialization and resilience of FASS while ensuring the critical infrastructure of the university has appropriate structures in place around personnel actions and financial management.

### **Section B: Please answer either question 3 or question 4**

3. If you are moving to a new regional business hub structure: *Not relevant*.
4. If your current business services structure is working well, please describe how the risks identified in the [audit report](#) are currently addressed?

FASS now provides appropriate controls, approvals and separation of duties for Business and Human Resource functions. FASS provides services based on service partnership agreements, which are reviewed annually and include details of the services provided by FASS, expectations on responsiveness and associated reportable metrics. FASS also utilizes a ticketing system for administrative requests, which helps ensure accountability and adherence to set service expectations. Separately, The Business Affairs Office has the in-house expertise inherent in their daily business functions to address the audit risks identified.

### **Section C: Optional**

5. Please share any other information about your plans to ensure that your portfolio provides effective and efficient business services. This may include collaborations, training, and workflow enhancements with University-wide offices such as University HR.

Finance and Administration, along with FASS, will continue to partner with University HR, Purchasing and Contracting Services, and the Business Affairs Office to ensure work continues to be performed in a consistent and efficient manner. Current partnerships include the Enhanced Recruitment Partner workflows with FASS and University HR, special contracting delegations to the head of FASS from PCS, and partnerships on a time and attendance system between FASS and the Business Affairs Office.

## **Report submitted by: VP General Counsel**

### **Section A: Please answer both questions**

1. How were business services provided in your portfolio in spring 2021 when the project launched?

Business Services were handled internally by each unit, although staff in the Office of the General Counsel provided services to University Records Management and some business services to the Office of Public Records due to the limited staff in those offices (1 and 2 employees, respectively).

2. What changes are you currently planning / implementing to improve services and address the risks identified in the [audit report](#)?

FASS will begin to provide transactional support in the areas of HR/Payroll, Accounting, and Travel for all units in the VPGC portfolio, although the Office of the General Counsel (OGC) will retain processing and payment of legal invoices.

Outside of legal invoices, units in the Vice President and General Counsel's (VPGC) portfolio have limited needs in these areas and we expect the Finance and Administration Shared Services (FASS) hub will be able to absorb this work without the need for additional staff. Correspondingly, the administrative staff in the portfolio who have been doing this work will be able to focus on their primary job functions, improving both efficiency and morale. Shifting transactional services for HR/Payroll, Accounting and Travel to a more centralized hub will reduce the risk inherent in the former model where employees were performing these tasks intermittently.

Since OGC has separate contracting authority for legal services and the VPGC portfolio includes the University's central procurement office, Purchasing and Contracting Services (PCS), we do not plan to move any of our portfolio's contracting needs to FASS. Rather, we are working with FASS to develop an additional position that will be part of PCS, but will be dedicated to processing and administering FASS contracts, which will formalize a connection between the hub and the central procurement office and improve service for FASS clients.

### **Section B: Please answer either question 3 or question 4**

3. If you are moving to a new regional business hub structure:

- a. Describe the target organizational structure

Aside from the addition of the new position to PCS, our org structure will not change.

- b. Share the current projected implementation timeline

We are hoping to begin implementation in March.

4. If your current business services structure is working well, please describe how the risks identified in the [audit report](#) are currently addressed?

*Not relevant.*

## **Report submitted by: VP Research and Innovation**

### **Section A: Please answer both questions**

1. How were business services provided in your portfolio in spring 2021 when the project launched?

The Office of the Vice President for Research and Innovation (OVPRI) provides integrated centralized business services to all the OVPRI research and innovation administration functions and the research core facilities (currently organized in to two units). The 14 centers and institutes (C&I) each have their own business services units. In spring 2021, each C&I had an individual or group providing business services to the unit.

2. What changes are you currently planning / implementing to improve services and address the risks identified in the [audit report](#)?

First, as the central unit for sponsored projects, we are working across the institution to strengthen and develop standard processes and best practices for sponsored projects administration. This includes coaching and collaboration with non-OVPRI units to strengthen sponsored administration services outside of OVPRI. Second, integrating and realigning our two existing central shared services units to improve service delivery.

Third, we are collaborating with the centers and institutes to integrate business services, using a phased approach that leverages staffing vacancies and other pressing needs to address service gaps.

### **Section B: Please answer either question 3 or question 4**

3. If you are moving to a new regional business hub structure:

- a. Describe the target organizational structure

We anticipate three business hubs to provide services to C&I with common research operations and administrative needs (e.g. physical science or biological science orientation). Aligning to common research will improve services to these units while creating more unified services. Our two non-C&I business hubs will be consolidated in one hub that provides core business services to the division.

- b. Share the current projected implementation timeline

Five of our 14 centers and institutes have consolidated services in two areas, with some significant organizational changes occurring this year. We anticipate additional integrations to occur in a phased manner over the next 24 months. The non-C&I administrative consolidation will likely occur in the next 6-9 months, as we are able to fill key positions. On-going sponsored project compliance obligations combined with very significant labor market challenges requires a planful and stepwise approach to ensuring that we provide high quality services to our research community and compliance with our obligations to our sponsors as we make organizational changes.

4. If your current business services structure is working well, please describe how the risks identified in the [audit report](#) are currently addressed?

*Not relevant.*

#### **Section C: Optional**

5. Please share any other information about your plans to ensure that your portfolio provides effective and efficient business services. This may include collaborations, training, and workflow enhancements with University-wide offices such as University HR.

We have worked to prioritize areas that require more robust and consistent processes for sponsored awards administration, regardless of organizational structure. We began to establish teams this fiscal year to develop best practices for key processes across not only the OVPRI but in the schools and colleges as well, where sponsored research activity also occurs. We are leveraging our central grants group, Sponsored Project Services, to convene staff from across the institution to develop and disseminate best practices. We anticipate enhancing a certification process to promote the use of these best practices.



# UO Business Practices Project

**Summary Report  
March 2022**

1

## Agenda

- Project background
- Project structure
  - Phase 1: Portfolio diagnostics
  - Phase 2: Strategic options
  - Phase 3: Implementation plans
- Project progress & next steps

2

## Project Background: Risks Identified

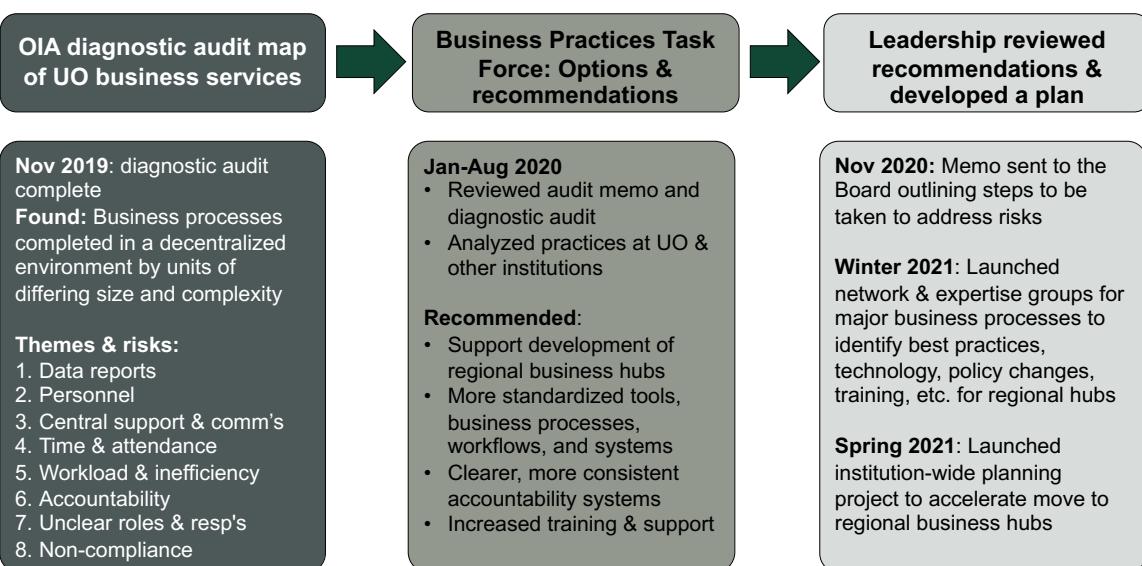
- Pattern of findings related to audits of central business functions
- Consistent theme: risk of decentralized business functions

**Jan 2018:** Office of Internal Audit memo to Board of Trustees identified risks connected to UO's decentralized structure re: business transactions

- The significant delegation of authority to local levels
- The lack of data necessary for decision-making and monitoring by oversight functions, including questions regarding the quality of existing data
- The absence of accountability necessary in a highly decentralized environment
- The assignment of responsibilities not always being aligned with necessary skills
- Individuals being assigned "a myriad of additional responsibilities," especially in smaller departments, which contributes to additional risk and/or operational efficiency

3

## Project Background: Senior Leadership Response



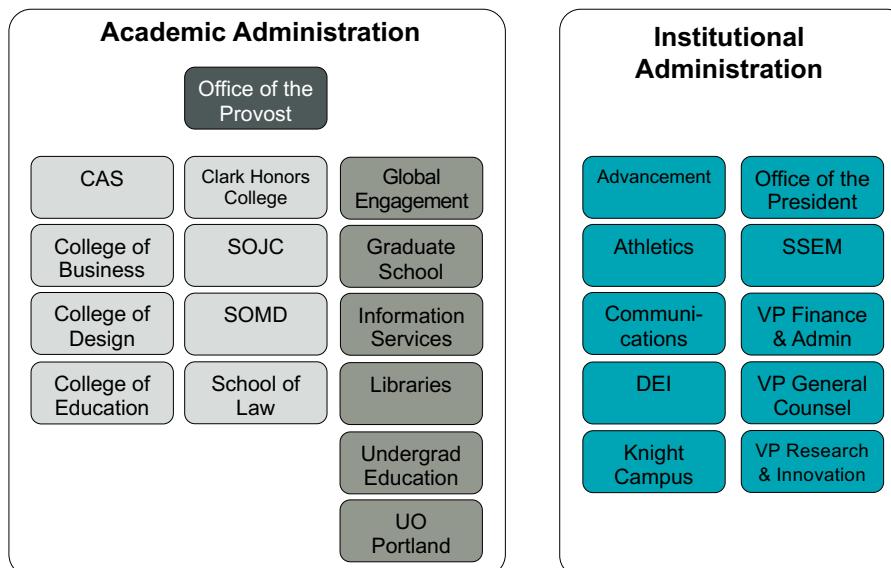
4

# Agenda

- Project background
- Project structure
  - Phase 1: Portfolio diagnostics
  - Phase 2: Strategic options
  - Phase 3: Implementation plans
- Project progress & next steps

5

# Portfolios



6

# Project Webpage

"The University of Oregon is always striving to be better in everything we do—that includes in how we operate day to day. The new business practices project will enable the institution to be more efficient and effective, and strengthen our services and businesses practices."



Michael H. Schill, President and Professor of Law



Patrick Phillips, Provost and Senior Vice President



Jamie Moffitt, Vice President of Finance and Administration and Chief Financial Officer

## Resources & Reference Materials

Success Stories

Related Initiatives

This project builds off the [recommendations](#) of the Business Practices Task Force which looked at the issues related to the [audit](#). Documents that provide reference and additional background information include:

- [Office of Internal Audit Risk Memo](#) (January 2018)
- [Office of Internal Audit Diagnostic Audit of Critical Business Functions](#) (November 2019)
- [Update to the Board of Trustees](#) (August 2020)
- [Business Practices Task Force Memo](#) (September 2020)
- [Memo to the Board of Trustees](#) (November 2020)

## UO Business Practices Project Success Stories

Several units and departments have already implemented processes to share business services through a regional hub. The following information provides insight from the perspective of the unit leaders who utilize the business practices hub and the service experts who transitioned from a single department to the regional hub to provide services such as payroll, recruitment, and information technology.

### Finance and Administration Shared Services (FASS)

FASS is a shared service hub that was created in 2016 and currently serves 16 units in the Finance and Administration (VPFA) portfolio. FASS provides business operations, HR, and IT services.

#### CPFMS, Office of Sustainability

Steve Mittel, Sustainability Director

(unit leader utilizing regional service hub)

I cannot say enough about the value you get from the support. As a small office, some things happen on an infrequent basis, including hiring staff, payroll, benefits, and reporting. FASS has been there to help get HR, purchasing and contracting, payroll, IT, and budgeting support in any way I could. I was leaning on informal networks and trying to retrain myself every time I had to hire someone or deal with travel forms. It was an overwhelming time consuming to have to figure that out every year.

#### Safety and Risk Services, Environmental Health and Safety

Steve Stackley, Director of EHS

(unit leader utilizing regional service hub)

EHS became a FASS client a few years ago. FASS brings a mix of tailored, personalized services as well as the knowledge and best practices that come with a large organization. The support from FASS has been the most beneficial in budgeting and HR support with recruitment, and as a director, I really appreciate the budgeting and finance support. FASS uses their professional experience and knowledge of their broader business to support us in our mission.

## Project Purpose & Goals

- Address audit risks related to decentralized structure and business transactions** (accounting, budgeting, purchasing and contracting, & HR transactions).
- Improve our business processes and practices**
- Improve support for local clients**

7

# Phase One: Portfolio Diagnostic

Quick Common Administrative Task Assessment Tool (Quantitative Diagnostic tool)

Portfolio		Example		Administrative Time Spent			
Portfolio	Date	7/1/2021	30	Number of staff working less than 5%	Number of staff working about 10%	Number of staff working about 25%	Number of staff working about 50%
Budgeting and Finance		1	2	1			3
Accounting		5	2	1			9
Travel		5	2		1		
Payroll		3		1			2
Pre-Award grant preparation							

**Business Practices: Qualitative Assessment of Current Staffing**

During Phase One of the Business Practices Project, we are asking each portfolio to consider how well this staffing structure is working. The purpose of the Quantitative Diagnostic is to help portfolios consider how well this staffing structure is working. The overarching questions are, 1) what is working well with the current structure, and 2) where do opportunities for improvement (e.g., service gaps) exist. The individual questions are meant to help you assess the quality of the business services you are receiving today in each functional area. We will be scheduling individual meetings with each portfolio to review these diagnostic analyses in July.

Please briefly answer the following questions. Bullet point or yes/no responses are fine.

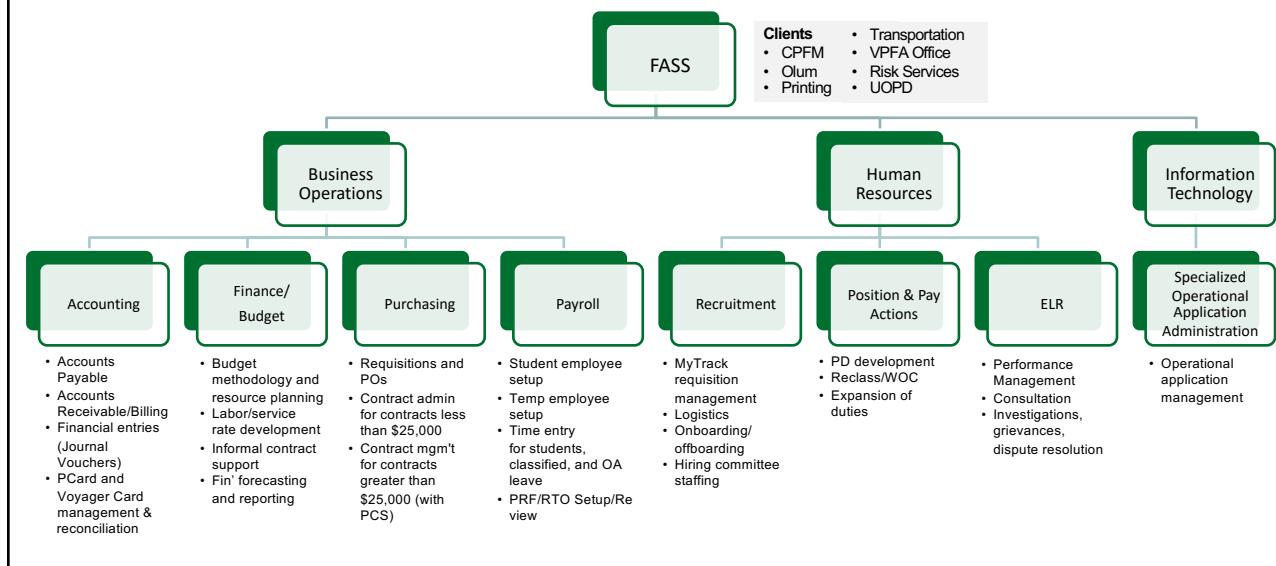
**Finance and Administration Business Practices Mapping Tool**

Date: July 14, 2021

VPFA
VPFA Totals \$ 90.6 M (Construction budget: additional \$102M - \$182M) 531 FTE
Human Resources \$ 5.4 M 42 FTE 0.45 0.55
Business Affairs Office \$ 6.6 M 60 FTE 0.45 0.65 0.25 0.15
Budget and Resource Planning \$ 0.8 M 6 FTE 0.4 0.4
Finance and Admin Shared Services \$ 4.4 M 40 FTE 10.75 [1.0] 4.75 1.85
Safety and Risk Services \$ 10.4 M 89 FTE
Campus Planning & Facilities Management \$ 50.7 M 242 FTE 0.75 4.25 1.0 0.15
Campus Services \$ 12.3 M 52 FTE 0.3
VPFA Office

8

## Phase Two: Strategic Options

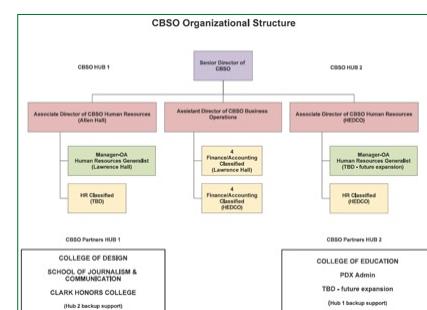
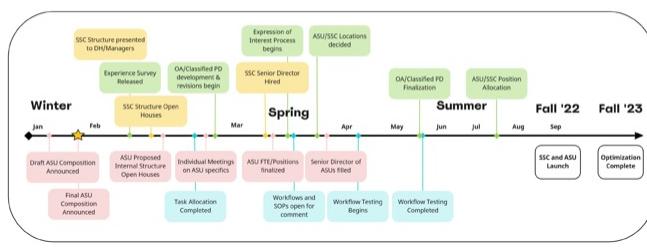


9

## Phase Three: Implementation Plans

- Focused on key issues such as transition timelines, change management and communication plans, and identification of potential issues / challenges

### CAS Shared Services Timeline



10

# Agenda

- Project background
- Project structure
  - Phase 1: Portfolio diagnostics
  - Phase 2: Strategic options
  - Phase 3: Implementation plans
- Project progress & next steps

11

## Portfolios Forming New Regional Business Hubs

Portfolios/Units	Pre-Project	Post-Project Strategic Structure
College of Arts & Sciences (CAS)	45 departments; decentralized business services with staffing at the local unit level	CAS standing up shared service center (SSC) and 8 academic support units (ASUs)
Office of the Provost – Schools and Colleges	8 Schools and colleges; most have independent business services with local staff; CBSO (regional hub) formed with some financial services for Design, College of Ed, and Honors College	Central Business Services Office (CBSO; regional hub) expanding to include Human Resources services and to also serve Journalism, in addition to Design, College of Ed, and the Honors College
Office of the Provost – Admin Units	Information Services, Undergraduate Education, Libraries, Global Engagement, and others; each have local business support	Administrative business hub being formed to serve all Provost admin units; Information Services moving to F&A portfolio and receiving support through FASS (regional hub)
Student Life	Major auxiliaries (EMU, PE & Rec) have separate business teams; Student Life started forming hub to serve other units	Student Life business hub expanding to serve all Student Life departments, including auxiliaries
Student Services and Enrollment Management	Fiscal and HR services handled decentrally	Student Services and Enrollment Management centralized business and travel team being formed
VP Research and Innovation	Shared business hub for central research functions; centers and institutes mainly have decentralized support	Beginning to develop shared regional hub structure for centers and institutes

12

## Portfolios Joining Existing Regional Business Hubs

Portfolios/Units	Pre-Project	Post-Project Strategic Structure
Division of Equity and Inclusion	Business services for division managed by VPEI office staff	Moving business support to Student Life regional shared services business hub
Office of the President	Business services supported by office staff in various offices	Moving business support to Finance and Administration shared services hub (FASS)
Information Services	Business services managed by local staff	Moving business support to Finance and Administration shared services hub (FASS)
VP General Counsel	Handled by staff in Purchasing and Contracting Services (PCS) and Office of General Counsel (OGC)	<ul style="list-style-type: none"> <li>Moving business support to Finance and Administration shared services hub (FASS)</li> <li>PCS to retain contracting (partners with FASS to provide contracting support to FASS clients)</li> <li>OGC to retain legal contracting and legal invoice processing</li> </ul>

13

## Portfolios with Existing Robust Business Offices / Hubs

Portfolios	Pre-Project	Post-Project Strategic Structure
Advancement & Communications	Business hub services both portfolios	Adding HR functions and improving regional hub governance structure
Athletics	Central business/human resource services provided to over 50 sport programs and administrative units	Continuing to enhance efficiencies and improve services to all internal and external stakeholders
College of Business	Two central administrative units: Fiscal Services and Faculty Support	Enhanced HR-payroll integration and improved cross-training opportunities
Knight Campus	Centralized Knight Campus business operations team provides all business services	Improving training and orientation materials for shorter onboarding timelines
Law School	Centralized business services	Improved incorporation of Foundation information
VP Finance and Administration	Business hub (FASS) established in 2016; provides services to majority of Finance and Administration departments	<ul style="list-style-type: none"> <li>Working with HR on enhanced Recruitment Partner workflows</li> <li>Providing services to President's office, General Counsel's office, Purchasing and Contracting, and Information Services</li> </ul>

14

## Next Steps

- Individual portfolios continue to implement transition plans
- Network / expertise groups work to refine membership (as hubs are being created / grown) and meet to share best practices, discuss common issues, and provide support to each other
  - Hub directors
  - HR leaders
  - Contracting leaders

## **Agenda Item #9**

### **Academic Area in Focus**

#### **Pine Mountain Observatory**

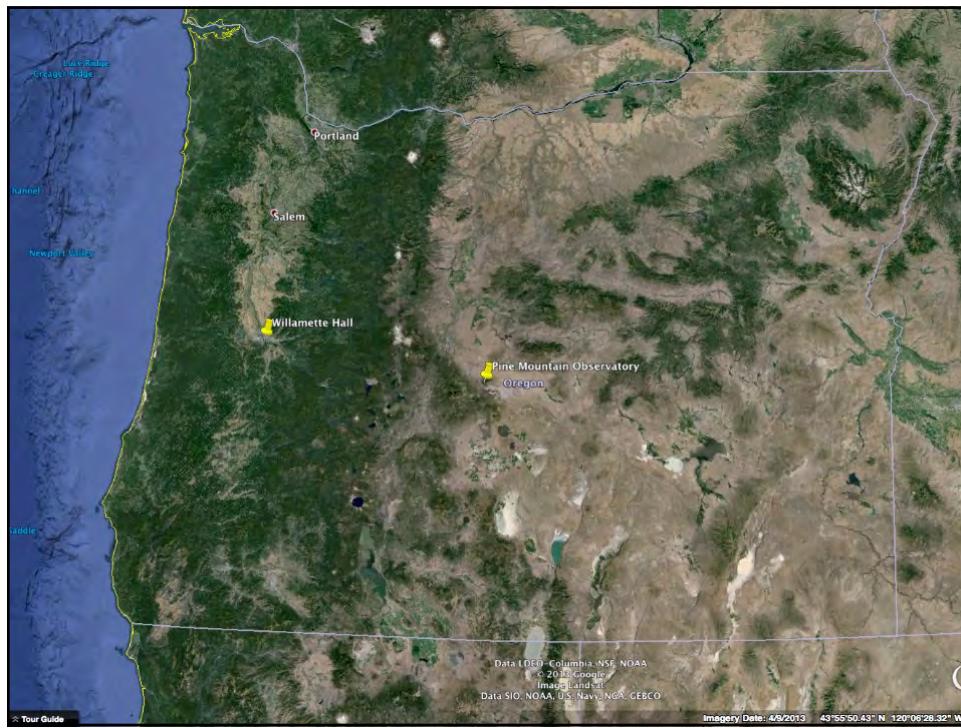
## Pine Mountain Observatory (PMO): Our Own Astronomical Oasis



### Credentials and Background

- Product of state schools
  - Lake Sumter CC
  - **University of Florida** (BS, PhD)
  - **University of Oregon** (faculty)
- Gemini Staff Astronomer
- NSF Program Director

- 15+ years observing at the 1<sup>st</sup>, 2<sup>nd</sup>, and 4<sup>th</sup> largest optical telescopes on Earth
- Awarded \$40 million in federal grants in 3 years at NSF
- Professional Astronomer, Researcher, and Outreach Specialist turned Professor
- *Director of PMO and Director of Undergraduate Studies in UO Physics (advisor)*

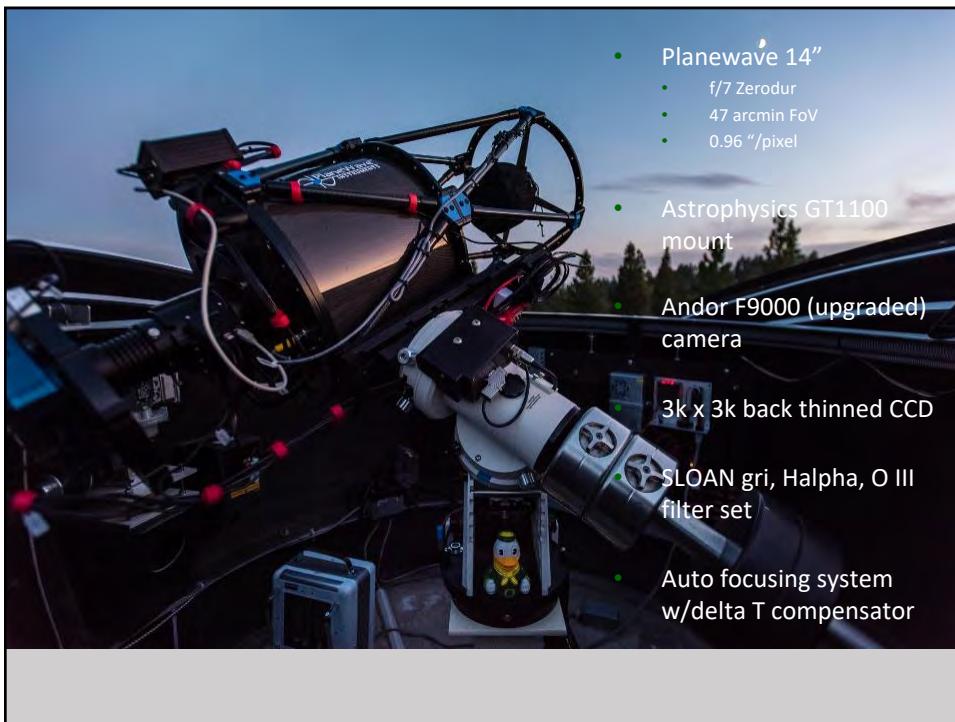


## PMO General Overview

<ul style="list-style-type: none"><li>• UO owned and operated</li><li>• 9 acre central Oregon UO campus in the Deschutes National Forest</li><li>• First telescope built in 1968, fourth telescope built in 2015, fifth installed in 2021</li><li>• ~25 miles east of Bend</li></ul>	<ul style="list-style-type: none"><li>• Undergraduate outreach, research, and creative projects now in progress</li><li>• Any UO student can get involved with PMO, all are invited to speak to RSF about visiting and/or volunteering there</li><li>• PMO is open to the public on Friday and Saturday nights during the summer</li><li>• COME VISIT FOR A VIP TOUR!</li></ul>
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*PMO by UO Undergraduate Photographer –  
Justin Hartney*





- **Planewave 14"**
  - f/7 Zerodur
  - 47 arcmin FoV
  - 0.96 "/pixel
- Astrophysics GT1100 mount
- Andor F9000 (upgraded) camera
- 3k x 3k back thinned CCD
- SLOAN gri, Halpha, O III filter set
- Auto focusing system w/delta T compensator

### *Control Room Operation of the Robbins Telescope*

- Windows based system
- Routinely operated by undergrads
- PHYS majors = research projects
- Other majors = data literacy
- All majors = access to a research-grade facility



*UO graduate (PHYS/KOR) Maggie Thompson 'gathering photons' in summer 2019*

### *Students, staff, and faculty analyzing data in the PMO dorm*





**Messier  
51 – the  
Whirlpool  
Galaxy**



**Messier  
20 – The  
Trifid  
Nebula**

## Extra Credit #1

**DUE:** before Friday, Oct. 22nd

GOAL: To get you to use a PMO image as your phone background!

1. Use any of the 4 images taken with the Robbins as the background of your phone. The images will be available for download on Canvas.
2. Find Dr. Fisher (NOT in/before/after class) and show him your phone with the image as the background. You can find me in office hours, around Willamette Hall, in Carson Hall at lunch time, in Dux Bistro...
3. Tell Dr. Fisher one fact you've learned about the object in your image.
4. This offer is open between now and the end of the day on Friday, October 22nd).

## First Undergraduate Research @ PMO

### Around the O

search this site

Academics & Research Campus News Student Life Workplace In The News Oregon Experts For Journalists Alumni

Wow at Pine Mountain: UO students zoom in on a dying star



June 27, 2016 - 6:00am

[Twitter](#) [Facebook](#)

Memorial Day weekend was special for a small group of UO undergraduate students. On May 28, they spotted an exploding dying star in a galaxy 35 million light years away while on duty at the UO's Pine Mountain Observatory near Bend.

The students' observation — done with a new telescope built with donor funding — helped the orbital

#### ACADEMICS & RESEARCH

School of Architecture and Allied Arts

College of Arts and Sciences

Lundquist College of Business

College of Education

Robert D. Clark Honors College

School of Journalism and Communication

School of Music and Dance

School of Law

Graduate School

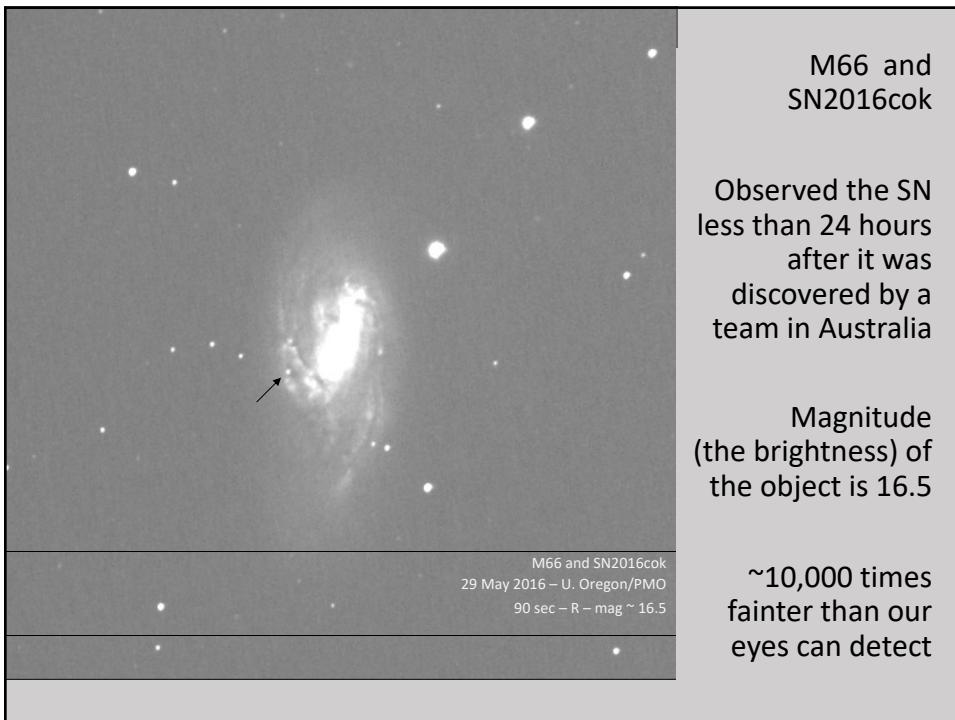
#### ACADEMICS AND RESEARCH

Cascader Undergrad dives into research in Aegean Sea

Nichole Kelly joins health cluster to improve eating behaviors

In a UO lab, water takes on the consistency of wine

UO scientists place extinct horse with humans in Paisley Caves

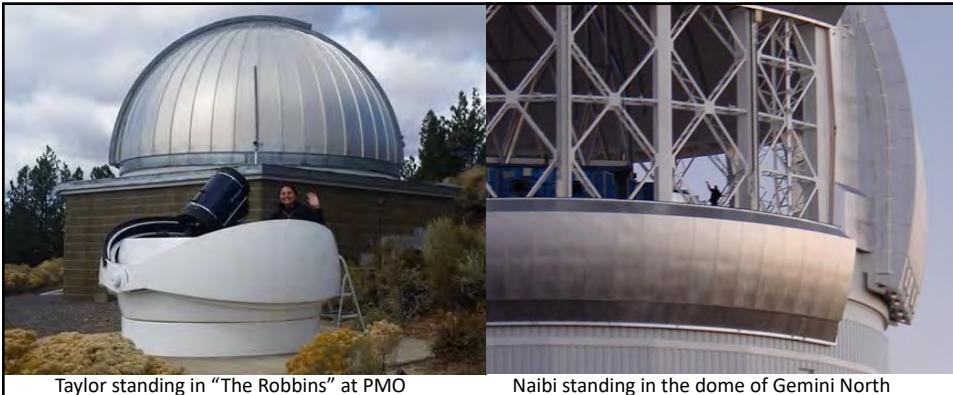


## The Staff of Research Facilities like PMO

- Facilities like observatories are excellent places for true multi-disciplinary projects
- **QUESTION!** - There are 110 people on the staff of Gemini, how many of those are Ph.D. astronomers?

Roughly 10 Ph.D. astronomers (about 10% of the staff!)

- 90% of the observatory staff are NOT astronomers (they are US!)
- ENG/CIS/PR/Human Resources/accounting/J-school – many disciplines are present at a research facility (this could be you!)



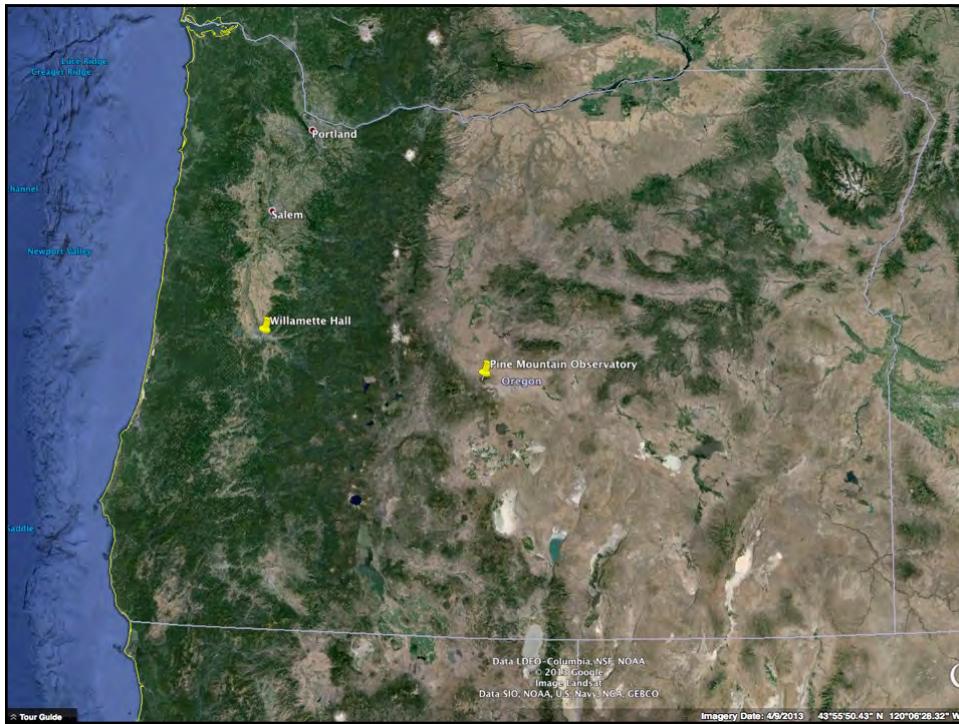
Taylor standing in "The Robbins" at PMO

Naibi standing in the dome of Gemini North

- Our goal at Pine Mountain is to be "Mini Mauna Kea"
- PMO is an excellent training facility – use it to prepare students to work at large facilities through legitimate research and technical programs
- PMO is an excellent STEM facility – use it to engage students in aspects of facility work, instrumentation, coding, astronomy, data science, etc.

#### Current Undergraduate Research Programs at PMO

- **PMORCC: Pine Mountain Observatory Remote Control Center**
- UO/PSU: student led project to image Open Clusters within the Milky Way for analysis of stellar colors
- NASA SOFIA/PMO: photometry of Herbig stars – young star embedded within the clouds of gas & dust from which they formed
- Kobe University & Sanda Technical High School: asteroid light curves and variability monitoring – student groups visiting since 2018
- Geoff/Digimarc/PMO: Public-Private partnership centered on high-speed speckle imaging and camera sensor characterization



## Once we have an upgraded internet connection...

- Let's build the UO ROCC:  
Remote Observatory Control Room  
University of Oregon
- Remotely connect and observe with PMO from Eugene
  - UO undergraduates (all majors) will 'eavesdrop' and observe
  - ASTR students can obtain data with PHYS majors
  - PMO becomes a part of campus in Eugene

## Model(!!) for the UO Campus Control Room (KLA 103a)



### PMO and FisherGroup - Successes

- The facility is in the best shape it has been since the 1980s
- We have a significant number of UO students involved in all aspects of PMO! (research, operations, technical, outreach)
- PMO students have presented research at the UO URS, NASA Space Grant Consortium, AAS (professional meeting)
- FisherGroup numbers since 2013:
  - 20 total students, 11 women, 9 men
  - 14 graduates
    - 10 are in STEM graduate school programs
    - 7 of those are women
- Active educational and research programs with local, national, international partners
- Raised approximately \$750k in private funding (thanks UO Development!)

## PMO - Forward Look



- There are maybe 20 “PMOs” remaining in the US. With continued support we have an opportunity to make PMO – literally – the best undergraduate observatory in the nation.

- Fisher and Luken are “fully committed” to making PMO a success – a small team with wide range of talents to operate a mid-sized facility

- Continued development of undergraduate programming including:
  - Potential STEM ARC (highly desired by UO)
  - Integration of PMO data into Physics laboratory classes
  - More state-wide outreach opportunities

Thank you to Tim, the  
Trustees, the  
Roundhouse  
Foundation, folks of  
central Oregon



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## **Agenda Item #10**

**Diversity, Equity & Inclusion Dashboard and Climate Survey**

# Institutional Data Dashboard

Defining, Measuring and Achieving our IDEAL Campus

UO Board of Trustees

March 15, 2022

## PRESENTERS

Patrick Phillips, Senior Vice President & Provost

Yvette Alex-Assensoh, Vice President for Equity and Inclusion

Mark Schmelz, CHRO & Associate Vice President

Sung-Woo Cho, Associate Vice Provost for Academic Data Analytics



# Institutional Data Dashboard:

Defining, Measuring and Achieving our IDEAL Campus

Progress since Fall 2021:

- Charged a data visualization team to work with Institutional Research and research/assessment teams from across campus
- Created a platform for an interactive, user-friendly set of dashboards to align with our thematic accountability areas and specified metrics
- Five out of 32 dashboard indicators are now built, with data ready for another 17 items. The full set is expected to be in dashboard form by the end of the calendar year.



# Institutional Metrics for Measuring and Defining Success

## Thematic Areas



## Dashboard Indicators by Thematic Areas

Diversity	Climate	Achievement
<ul style="list-style-type: none"><li>Demographics of all faculty and staff</li><li>Turnover rates for all faculty and staff</li><li>Demographics of candidate pools for faculty and staff</li><li>Demographics in applications, admissions and enrollments of all students</li></ul>	<ul style="list-style-type: none"><li>Gallup campus-wide survey for all faculty and staff in 2022</li><li>SERU data for all students</li><li>Student Life surveys for undergraduates</li><li>Graduate Studies exit surveys for graduate students</li></ul>	<ul style="list-style-type: none"><li>Average time to promotion for TTF and NTTF</li><li>Research awards for TTF</li><li>Number of courses taught for NTTF</li><li>1<sup>st</sup> year retention rates, and 4/5/6 yr graduation rates for undergraduates</li><li>Graduate school admissions for undergraduates</li><li>Time to degree and completion rates for graduate students</li><li>GE appointments for graduate students</li></ul>
<p><b>To be developed:</b> <i>Transformational Leadership</i></p> <p>Creating curriculum, policies, processes that are anti-oppressive and raise the standard of inclusive excellence for all.</p>		

- All disaggregated by race, ethnicity, and gender; first-gen and Pell-eligible for students*
- Faculty includes TTF and NTTF; Staff includes Officers of Administration and Classified Staff*



## IDEAL Campus Climate Survey of UO Employees

- First all-campus climate survey at the UO
- Led by Gallup, Inc., the survey will launch in early spring term. Reports expected to senior leadership by early summer.
- All UO faculty, OAs, classified staff and graduate employees will be invited to take the survey
- Data will be collected directly by Gallup, and kept strictly confidential – reporting will be anonymized
- Specific measures will be chosen to include on the Institutional Data Dashboard, to serve as a compass for leaders to understand critical issues at both unit and University levels



## IDEAL Campus Climate Survey of UO Employees

### Survey Themes

<ul style="list-style-type: none"><li>• Employee engagement as measured by the Gallup Q12—measuring aspects of employee's most basic needs, teamwork and growth opportunities</li><li>• Professional development<ul style="list-style-type: none"><li>• Fairness in treatment of individuals</li><li>• Opportunities for advancement</li></ul></li><li>• Psychological safety and safety to speak</li><li>• Survey accountability</li><li>• Recruitment and onboarding processes</li><li>• Cultural humility</li><li>• Team efficacy<ul style="list-style-type: none"><li>• Collaboration and cooperation</li><li>• Openness in dialogue</li></ul></li></ul>	<p>Diversity, equity and inclusion</p> <ul style="list-style-type: none"><li>• Coworker commitment to furthering DEI</li><li>• Culture of Inclusion index measuring feelings of respect, value and trust in the institution</li><li>• Recognition for work related to advancing equity</li><li>• Institutional commitment to improving racial justice and gender equality</li><li>• Manager readiness to have meaningful conversations about issues related to racial justice and trauma individuals have experienced</li></ul>
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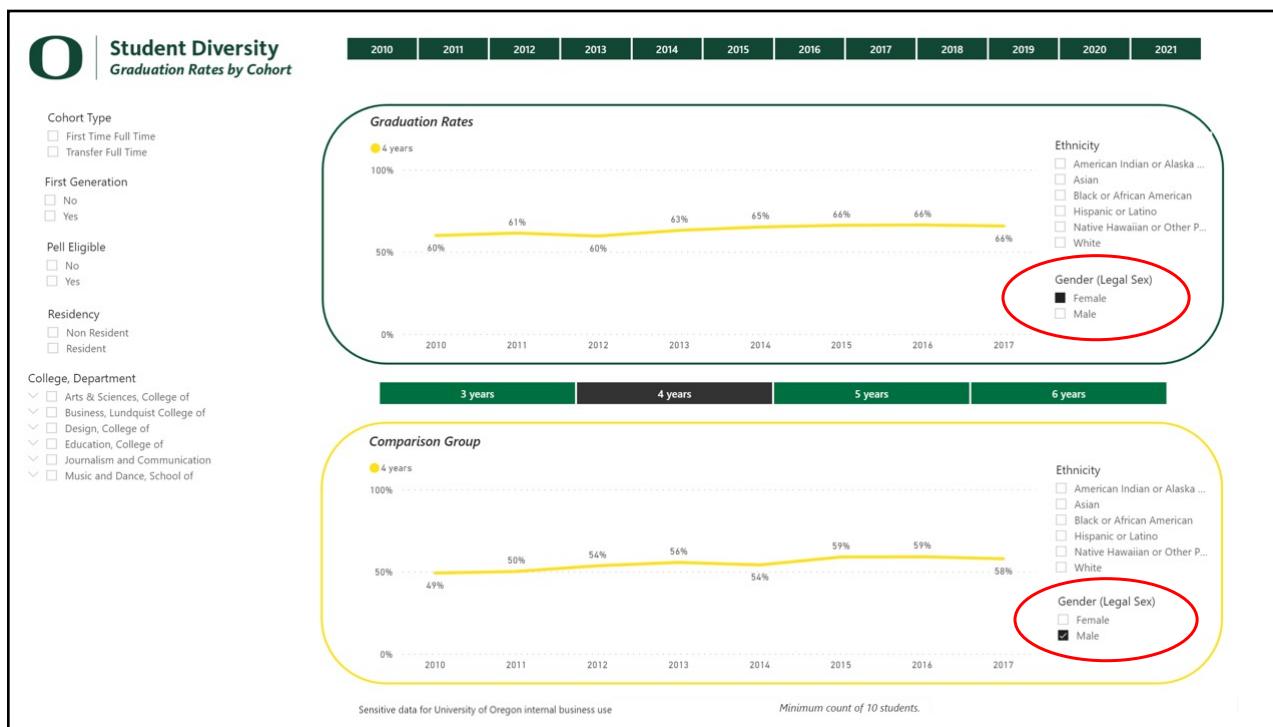


## Demonstration of the Data Dashboard

The following three slides are example screen shots from the interactive dashboard which will be demonstrated during the meeting.

The dashboard allows the user to filter the data by various pre-set variables – the data shown in these examples are filtered by the variable “female”.





## Institutional Data Dashboard – Next Steps

- High-level data will be available on a public-facing website – first dashboards expected in spring
- Real-time, unit-level data will be accessible to academic and administrative leadership. Policy Group will determine levels of access.
- Each dashboard will be contextualized to facilitate proper analysis and understanding of the data
- Workshops for leadership to learn how to use the dashboards and become stronger data consumers
- Data analysis to be incorporated into regular decision-making, helping us prioritize action



## Discussion | Q&A



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## **Agenda Item #11**

### **Semi-Annual Update on Student Success**



# Student Retention and Graduation Data

Board of Trustees Meeting March 2022

Sung-Woo Cho, Associate Vice Provost for Academic Data Analytics  
Kimberly Johnson, Vice Provost for Undergraduate Education and Student Success  
Claire Matese, Assistant Director, Institutional Research

## Retention and Graduation Overview

*Equity & Inclusion Dashboard*

- Using IR data, we are now able to visualize how cohorts of undergraduate students finish their degrees or persist over time
- 3-, 4-, 5-, 6-year graduation rates
- 2-, 3-, 4-year retention rates
- Using the dashboard allows us to immediately see different groups of undergraduates' outcomes differ over time
- We are also able to easily compare two groups of students based on their ethnicity or gender



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## Goals of Data Sharing

*Equity & Inclusion Dashboard*

- Retention and graduation trends should become common knowledge for all UO stakeholders
- UO stakeholders will be able to:
  - Quickly focus on different student populations
  - Determine how outcomes differ for specific groups
  - Monitor whether outcome gaps between groups are increasing or decreasing over time



# Demonstration of Student Data Dashboard



## Student Diversity

Retention Rates by Cohort

### Cohort Type

First Time Full Time

Transfer Full Time

### First Generation

No

Yes

### Pell Eligible

No

Yes

### Residency

Non Resident

Resident

### College, Department

- Arts & Sciences, College of
- Business, Lundquist College of
- Design, College of
- Education, College of
- Journalism and Communication
- Music and Dance, School of

2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021

### Retention Rates

2 years  3 years

100%  
86%  
78%

50%  
78%  
79%

0%  
86%  
84%  
87%  
81%  
83%  
82%  
83%  
87%  
80%  
86%  
87%  
88%

### Ethnicity

- American Indian or Alaska Native
- Asian
- Black or African American
- Hispanic or Latino
- Native Hawaiian or Other Pacific Islander
- White

### Gender (Legal Sex)

Female

Male

2 years 3 years 4 years

### Comparison Group

2 years  3 years

100%  
87%  
78%

50%  
78%  
79%

0%  
87%  
88%  
87%  
86%  
87%  
85%  
84%

### Ethnicity

- American Indian or Alaska Native
- Asian
- Black or African American
- Hispanic or Latino
- Native Hawaiian or Other Pacific Islander
- White

### Gender (Legal Sex)

Female

Male

Minimum count of 10 students. Sensitive data for University of Oregon internal business use only.



## Student Diversity

Graduation Rates by Cohort

### Cohort Type

First Time Full Time

Transfer Full Time

### First Generation

No

Yes

### Pell Eligible

No

Yes

### Residency

Non Resident

Resident

### College, Department

- Arts & Sciences, College of
- Business, Lundquist College of
- Design, College of
- Education, College of
- Journalism and Communication
- Music and Dance, School of

2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021

### Graduation Rates

4 years  5 years  6 years

100%  
73%  
70%

50%  
56%  
58%

0%  
73%  
72%  
74%  
72%  
74%  
74%  
75%  
76%  
74%  
75%  
76%  
77%

### Ethnicity

- American Indian or Alaska Native
- Asian
- Black or African American
- Hispanic or Latino
- Native Hawaiian or Other Pacific Islander
- White

### Gender (Legal Sex)

Female

Male

3 years 4 years 5 years 6 years

### Comparison Group

4 years  5 years  6 years

100%  
64%  
70%

50%  
43%  
44%

0%  
64%  
70%  
67%  
71%  
68%  
72%  
70%  
71%  
69%  
70%  
69%

### Ethnicity

- American Indian or Alaska Native
- Asian
- Black or African American
- Hispanic or Latino
- Native Hawaiian or Other Pacific Islander
- White

### Gender (Legal Sex)

Female

Male

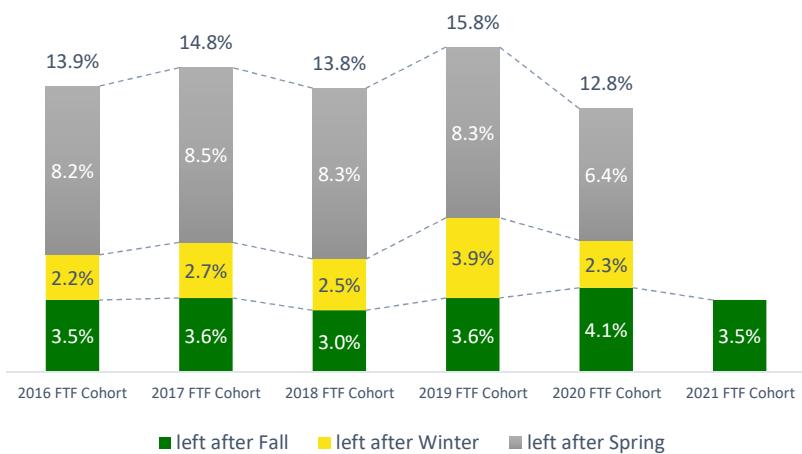
Minimum count of 10 students. Sensitive data for University of Oregon internal business use only.





# Retention and Graduation Contexts

## When Did First-Year FTF Separate? *Focus on Retention*



## Other Considerations for Fall 2020 Cohort

*Focus on Retention*

### Demographics

- Higher proportion of resident students
- Lower proportion of first-generation students

### First-Year Grades

- Lower proportion receiving D, F, or N grades
- Policy changes

### Finances

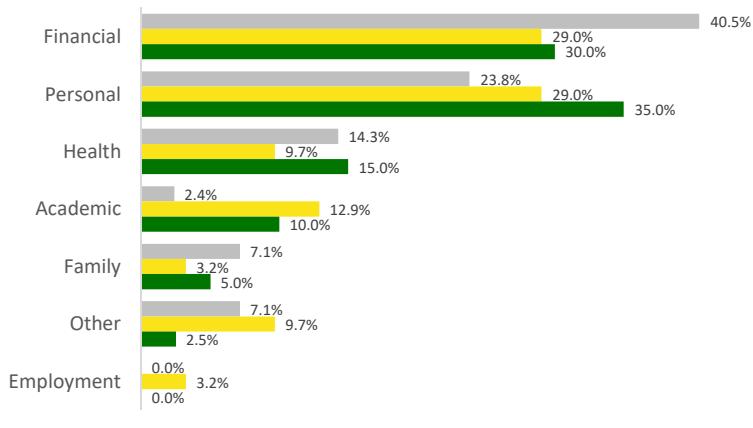
- More students receiving more aid
- Higher Education Emergency Relief Fund



## Exit Survey: Why FTF Left the UO After 1<sup>st</sup> Term

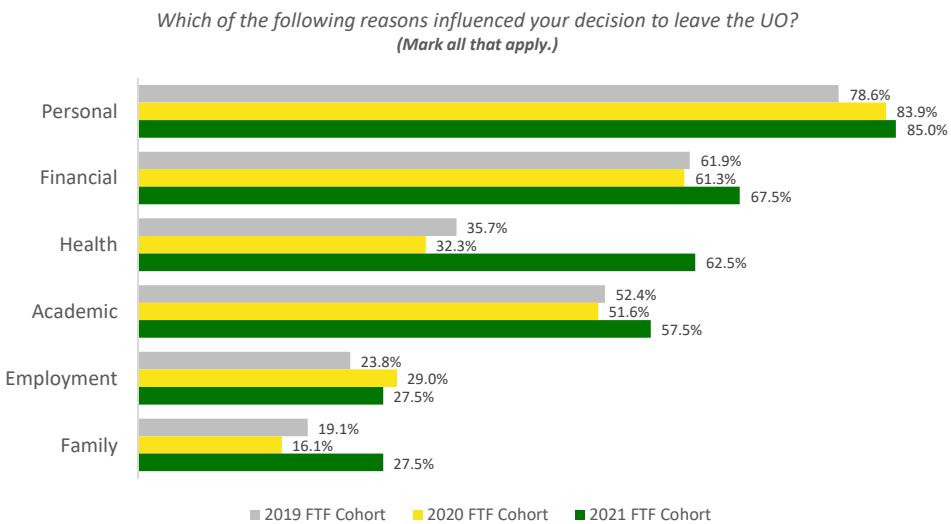
*Focus on Retention*

*What is the single most important factor in your decision to leave the UO?*



## Exit Survey: Why FTF Left the UO After 1<sup>st</sup> Term

*Focus on Retention*



## Predictive Analytics

*Focus on Graduation*

- Predictive analytics using in-house machine learning
- Identify at-risk students based on pre-college and early college characteristics
- Predict on-time completion for students in their junior year
- Determining how predictions changed for the Fall 2019 cohort, which was significantly impacted by pandemic
- Implementation in targeted advising and microgrant disbursement



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# Questions?

Sung-Woo Cho: [swcho@uoregon.edu](mailto:swcho@uoregon.edu)  
Kimberly Johnson: [johnskim@uoregon.edu](mailto:johnskim@uoregon.edu)  
Claire Matese: [cmatese@uoregon.edu](mailto:cmatese@uoregon.edu)

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## **Agenda Item #11**

### **Board Chair Transition**

**THERE ARE NO MATERIALS FOR THIS SECTION**

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