

To: Michael Schill, President
From: Jamie Moffitt, Vice President for Finance & Administration and CFO, TFAB Co-Chair, and Kevin Marbury, Vice President for Student Life, TFAB Co-Chair
Date: May 10th, 2019
Re: Follow Up Memo regarding recommendations of the FY2019 Tuition and Fee Advisory Board (TFAB) regarding Resident Tuition Rates
Cc: Jayanth Banavar, Senior Vice President and Provost

On February 6th, we sent you a memo regarding the Tuition and Fee Advisory Board (TFAB) composition, process and recommendations for all FY2020 tuition and fee rates with the exception of resident, undergraduate tuition rates. The Board of Trustees (Board) approved those rates (with a minor change in the Health Center Fee) at its March meeting. At that time, we did not provide recommendations to you regarding resident, undergraduate rates as the Board indicated that it wanted to wait to set those rates until its May meeting when the institution would have more information available to it regarding projected enrollment for next year and likely state appropriation. This memo provides you with that recommendation, plus background information on the TFAB's process and considerations as we made our recommendation. For detailed information about the entire TFAB process, please see Appendix 1 (Feb. 6th TFAB memo).

Budget Gap

At the March Board meeting, the Board discussed the significant E&G (Education and General Expenses) fund budget gap facing the institution. Specifically, the following factors create a gap between expected revenue and expected costs for FY2020:

• Existing FY2019 budget gap (as of Q2):	\$7.9 million
• FY2020 Cost Drivers	\$23.6 million
• Governor's Recommended Budget	-\$2.7 million
• Total Gap in Funding:	\$34.2 million

Actions Taken to Reduce Budget Gap

At the March Board meeting, and continuing into the spring, several actions have been taken that reduced the expected FY2020 budget gap. They include the following:

• 2.97% non-resident undergraduate rate increase approved	\$7.4 million
• President announced general fund budget cuts	\$11.6 million
• Co-Chairs of Ways & Means Committee Budget	\$2.9 million
• Value of Total Actions	\$21.9 million

After considering the impact of these actions, the institution was still left with a projected E&G fund gap of approximately \$12.3 million.

Sensitivity Analysis

The \$12.3 million projected funding gap assumes stable enrollment. While the institution has been investing in initiatives to increase enrollment, we are currently facing a significant decline in our international student population, which has dramatically impacted the budget. Over the last three years, the university's international student population has dropped by almost 1,000 students, which represents a loss of over \$30 million of recurring tuition revenue. Given the size of existing international student cohorts, the Office of Institutional Research is projecting that the number of international students on campus will continue to decline as larger cohorts of international students graduate and are replaced with smaller entering cohorts. The \$12.3 million estimated funding gap assumed that current recruitment initiatives will be capable of fully offsetting the impact of declining international student enrollment.

In April, TFAB members reviewed a sensitivity analysis that looked at various potential outcomes related to (1) legislative funding in the PUSF (Public University Support Fund), and (2) potential projected enrollment, to answer two questions:

- (1) What would the budget gap be after the institution implements the announced \$11.6 million of recurring budget cuts, *and* if resident tuition increases were held to under 5%?
- (2) What resident tuition rate increase would be necessary to balance the FY2020 budget *after* the \$11.6 million of budget cuts were taken into account?

Appendix 2 provides an overview of this sensitivity analysis.

At the time the analysis was conducted, there were several outstanding unknown factors that could affect the size of the projected funding gaps. These included:

- Q3 update to FY2019 budget gap
- Enrollment projections based on May student deposits
- Legislative process – expected PUSF funding

Q3 Update to FY2019 Budget Gap

As of Q2 (first six months of the fiscal year), the E&G fund was projected to be running a structural deficit of around \$7.9 million. While the finance team is still analyzing data from Q3, our preliminary review indicates that the projected structural deficit is likely to grow by an additional \$2-\$3 million, resulting in a total deficit of approximately \$9.9-\$10.9 million. As this recurring deficit will need to be addressed in future years, it adds to the size of the funding gap in the E&G fund.

Projected Enrollment

The enrollment management team has reported a successful recruiting season. The investments that have been made in additional recruiters, marketing, and scholarships appear to have been effective. Student deposits are higher than last year and although there is always the risk that summer "melt"

(i.e., students who make a tuition deposit but do not end up attending the institution) will be greater than expected, the enrollment management team is conservatively projecting that not only will we fully meet our enrollment targets but we will exceed those targets by approximately 150 resident students and 20 non-resident students. These additional students *should* generate approximately \$1.7 million in additional, unanticipated net tuition revenue.

Legislative PUSF Funding

In the Governor's initial recommended budget released in November, the PUSF was flat-funded, which would have resulted in a \$2.7 million cut to the University of Oregon's FY2020 state appropriation allocation. The more recent budget released by the co-chairs of the Ways and Means Committee increased PUSF funding to \$40.5 million, which would result in a \$200K year-over-year increase to the University of Oregon state allocation, beginning in FY2020. The final figure for the PUSF funding is not yet known. Although we would like to see at least \$120 million invested in the PUSF, the committee felt that such an increase was unlikely based on discussions with Libby Batlan and Hans Bernard, the UO's government relations staff. Rather, a more likely scenario is that final PUSF funding will fall somewhere between \$60 million and \$80 million. Below are the figures (calculated using the Higher Education Coordinating Commission's allocation model) for how much funding the UO would receive in FY2020 under various PUSF scenarios:

- | | |
|--------------------------|--|
| • PUSF at \$40.5 million | UO receives \$200K additional in FY2020 |
| • PUSF at \$60 million | UO receives \$2.0 million additional in FY2020 |
| • PUSF at \$80 million | UO receives \$3.9 million additional in FY2020 |
| • PUSF at \$100 million | UO receives \$6.0 million additional in FY2020 |
| • PUSF at \$120 million | UO receives \$8.0 million additional in FY2020 |

Scenario Analysis

Throughout the course of the year, the TFAB used a projections calculator to discuss a broad range of tuition and budget cut scenarios (see Appendix 3 –tuition calculator). The full list of scenarios reviewed on May 7 is included in this document as Appendix 4; previously considered scenarios are listed in Appendix 5 (meeting summaries) and Appendix 1 (February memo). In each case, we considered various scenarios, based on different assumptions, using seven variables: (1) the FY19 budget deficit, (2) PUSF funding, (3) cost drivers, (4) budget cuts, (5) enrollment growth, (6) resident tuition rate increases, and (7) non-resident tuition rate increases. While a number of variables are still unknown, the assumptions in the various scenarios changed throughout the year as more information became available (e.g., enrollment growth) and decisions were made (e.g., non-resident tuition) about each variable. It should be noted that at our final meeting, the PUSF was still unknown so we felt compelled to consider various scenarios rather than relying on actual numbers.

Recommended Resident, Undergraduate Tuition Rate

After much discussion, the TFAB is recommending that you consider a graduated tuition schedule that *assumes* \$70 million of additional funding in the PUSF. However, should the PUSF increase above this estimate (e.g., \$80 million), we are recommending that those additional PUSF funds should be used for

the purpose of reducing the resident tuition increase, according to the proposed tuition schedule below. Please note that several members representing ASUO leadership have indicated that they are not supportive of this proposed schedule and will instead be submitting an alternative proposal regarding tuition.

The advisory group also recommends that the university set aside additional support funds, beyond what is normally budgeted, to support low-income resident students not covered by the PathwayOregon program. The figures in the chart below assume that in addition to the normal 10% of tuition revenue that is set aside for fee remissions, that an additional 10% of net tuition revenue from the resident tuition increase will be set aside to help students according to needs-based criteria. These funds could be used in a number of different ways to support students who are not eligible for PathwayOregon but who have significant income needs (e.g., fully offset the proposed tuition increase, partially offset the proposed tuition increase, focus on keeping the impact of the tuition increase below 5%, creation of a new emergency fund, etc.). The group discussed the fact that creating additional support funds (whether scholarship or emergency funds) would impact the budget and could result in a slightly higher tuition increase. It was noted that many other schools provide much greater levels of scholarship support than the UO and that these fee remissions are often funded with a higher tuition rate (i.e., high tuition/high aid model). It also should be noted that while there was general support for considering additional support for existing students affected by tuition increases, a concern was expressed about instituting a new precedent regarding additional set aside dollars for student support without additional study. It is important to note that all students in the PathwayOregon program (2,360 low income resident students in FY2019) who remain eligible for the program will continue to have all tuition and fees fully covered by the university and will not be directly impacted by this tuition increase.

Proposed Tuition Increase Schedule:

PUSF Level	Resident Tuition Rate Increase	New Support Funds for Low Income Residents Not Covered by PathwayOregon	Announced Cuts	Remaining Gap
\$70 million	11.06%	\$830K	\$11.6 million	\$2.3 million
\$80 million	9.68%	\$727K	\$11.6 million	\$2.4 million
\$90 million	7.83%	\$589K	\$11.6 million	\$2.5 million
\$100 million	6.45%	\$486K	\$11.6 million	\$2.4 million
\$110 million	5.53%	\$417K	\$11.6 million	\$2.0 million
\$120 million	4.61%	\$348K	\$11.6 million	\$1.7 million

Finally, many members of the TFAB felt strongly that the university should consider strategies over the long term for increasing its fee remission budget for needs-based aid to resident Oregonians who are not eligible for the PathwayOregon program.

To: Michael Schill, President
From: ASUO Executive
Date: May 10, 2019
Re: Minority Report Memo regarding the FY2019 Tuition and Fee Advisory Board (TFAB)
recommended Resident Undergraduate Tuition Rates

This minority report memo will provide the ASUO Executive perspective on the FY2019 tuition-setting process, based on the participation of Maria Gallegos-Chacón (ASUO President), Imani Dorsey (ASUO Internal Vice President), and Odalis Aguilar-Aguilar (ASUO State Affairs Commissioner) as official members of the Tuition and Fee Advisory Board (TFAB), in collaboration with other members of our executive cabinet whom attended TFAB meetings over the course of the process. Additionally, this memo will provide our suggestions regarding the resident undergraduate tuition rate contextualized with our analysis of the University of Oregon budget structure, as a whole.

Participation on TFAB

The makeup and function of this FY2019 TFAB began in accordance with the requirements of HB 4141. In regards to ASUO representation, we can confidently say these implemented changes have improved the operation of the advisory board in pursuit of better student inclusion in the tuition-setting process. Although, it should be noted that the students ASUO was not responsible for appointing were not fully present; Tova Kruss and Aimée Marquez were the two members who did attend every meeting. The graduate student and the other undergraduate student did not attend regularly, but occasionally, ASUO members brought an additional student, which made up for absences in student representation. We encourage incoming ASUO leadership, TFAB co-chairs, and Debbie Sharp to continue to partner to build on the progress TFAB has made to be more accessible to the general campus population. Additionally, we are disappointed with the lack of advocacy on behalf of co-chair and VP Marbury in which he represents student life but seldom advocated for students, despite attempts President Gallegos-Chacón has made requesting his aide. It is critical that students are not the only ones advocating for students.

Legislative Budget Advocacy

ASUO officials have been in Salem multiple times a week, in partnership with the Libby Batlan, Hans Bernard, and other UO representatives, advocating that \$120 million be allocated to the PUSF. We brought updated knowledge from the legislature to the TFAB to get a better sense of the funding levels the UO would receive, in order to provide the TFAB with more certainty on how this could affect the budget hole. At this moment, it appears that the most likely funding scenarios for the PUSF will fall somewhere between \$60 million, with the UO receiving an

additional \$2 million, and \$80 million, with the UO receiving an additional \$3.9 million. We are doing our best to continue advocating for funds until the session is over.

Perspective on Budget and Actions Taken to Address the Budget

Recognizing the \$34.2 million E & G budget shortfall, we recommended the University make cuts and move money around to alleviate the burden students would take on through paying an increasing cost of education and ensure that money is most effectively spent in accordance with the purpose of a university, which is to provide a quality post-secondary education. We are most concerned about those students most susceptible to tuition increases, meaning low-income, Pell-eligible and non-Pell eligible students, first-generation, and students of marginalized backgrounds.

In response, the University is proposing \$11.6 million in strategic cuts, claiming to protect student success, affordability, campus safety, and revenue-generating areas of campus. As a result, we are seeing the financial well-being of our unionized workers on campus be threatened, despite the disproportionate amount of work they provide in comparison to their benefits and wages to keep this institution operating. The Labor and Education Research Center, the Jordan Schnitzer Museum of Art, the Oregon Bach Festival, demonstrate the devaluation of unions and the arts by this university. We cannot support cuts that hurt the learning environment. For example, this means protecting GEs and the critical work they do directly with students whether it be teaching, grading, or enriching the community with their research.

We are highly concerned about the incongruence between the seemingly, highly-sensitive and unprotected E&G side of the budget compared to the, as described, “untouchable Other Funds” side of the budget, comprised of Grants and Contracts Revenue, Auxiliary Revenue, Student Center Revenue, Designated Operations Revenue, and Restricted Gifts. We understand this side of the budget is majority self-sustaining, contains money from non-tuition funded outside sources, and are protected by various legal contracts, but the priorities of this side are, in our opinion, targeted more towards providing a lavish experience at the UO, which is significantly less important than providing a quality, secure, and sound education. The claim that these construction projects and gifts from donors are integral to investing in this long-term financial well-being of the university in the face of disinvestment from the state, is relying on the status quo notion that increasing enrollment and growing campus will fix these budget problems. As we have seen with enrollment, it is constantly in flux and has hurt the university immensely. The campus is beautiful and we provide an illustrious non-educational experience, but students are not coming because it is too expensive in comparison to the quality. The strategy of investing, growing campus, and accepting frivolous gifts is not the concern of students today who risk being priced out.

It is not on student's backs to fix an unbalanced budget. ASUO groups are held accountable to every penny they spend and are vigilant when it comes to being fiscally responsible. We find it hard to believe the University is consistently in a deficit and instead of looking for transformative, creative, and sustainable budget solutions, we continue to raise tuition and cut employees as our only solution. We expect more from our university, and this fiscal irresponsibility has hurt us this legislative session in which legislators have been aware for years that UO has an issue with overspending as a result of poor priorities.

Further, last year, there was a transfer of approximately \$14 million from the E&G budget to Plant Funds on the "Other Funds" side of the budget. We recognize this is under the discretion of departments to work on capital projects they see necessary and we do not completely disagree with this. The point is, if money is able to move, and in these amounts, we believe it is imperative to explore options for flowing money from the "Other Funds" to E&G, especially in financial conditions as dire as these in an effort to bring our focus back to providing an affordable, accessible, and quality education as the number one priority.

Financial Aid

We are in agreeance with the suggestion from TFAB to allocate tuition to financial aid, and it should be noted that ASUO leadership have been pushing this kind of idea from the beginning.

From the FY2019 TFAB Undergraduate Resident Tuition Recommendation:

"The advisory group also recommends that the university set aside additional scholarship funds, beyond what is normally budgeted, to support low-income resident students not covered by the PathwayOregon program. The figures in the chart below assume that in addition to the normal 10% of tuition revenue that is set aside for fee remissions, that an additional 10% of net tuition revenue from the resident tuition increase will be set aside to help students according to needs-based criteria. In total we are recommending that 20% of tuition revenue is allocated for students who are likely most vulnerable to tuition hikes. These funds could be used in a number of different ways to support students who are not eligible for PathwayOregon but who have significant income needs (e.g., fully offset the proposed tuition increase, partially offset the proposed tuition increase, focus on keeping the impact of the tuition increase below 5%, creation of a new emergency fund, etc.). The group discussed the fact that creating additional support funds (whether scholarship or emergency funds) would impact the budget and could result in a slightly higher tuition increase. It was noted that many other schools provide much greater levels of scholarship support than the UO and that these fee remissions are often funded with a higher tuition rate (i.e., high tuition/high aid model). It is important to note that all students in the PathwayOregon program (2,360 low income resident students in FY19) who remain eligible for the program will continue to have all tuition and fees fully covered by the university and will not be directly impacted by this tuition increase."

In this meeting members also discussed that these funds should be consulted with student leadership from ASUO to get a sense of how the student body would be best served with this model of increased financial aid.

There is no doubt that the tuition setting process is difficult and that this year has had many challenges. With that being said, ASUO has found the suggestion of an 11.06% in state tuition

increase to be unfair and irrefutable towards students. Far too long students have had to carry the burden of funding public universities across the United States, and this burden is resulting in homelessness, hunger, and students being priced out or all together left out of a chance at a better life. It is the duty of the ASUO to protect and advocate for students which is why we have submitted this minority report today. Throughout the tuition setting process we have been left with several unanswered questions, namely; why some budgets are deemed as “untouchable” and therefore non transferable (athletics, housing, etc.) when other public universities use transfers to fill holes in times of deficit. The reliance on students and enrollment projections has proven time and again to be an irresponsible tactic. We encourage President Schill and the Board of Trustees to seriously consider putting in the extra work to restructure this budget to reflect this true priorities of the University of Oregon and ensure students are protected in pursuit of their education. Students are highly critical of these budget issues, but we also have many creative ideas for how to fix it. Listen to us. It may be strenuous to shift from the status quo, but it will be well worth it.

Appendix List

Appendix 1	February TFAB Recommendations Memo	p. 10
Appendix 2	Sensitivity Analysis	p. 22
Appendix 3	Tuition Calculator	p. 23
Appendix 4	Scenarios Reviewed by the TFAB at May 7, 2019 Meeting	p. 24
Appendix 5	TFAB Meeting Summaries	p. 25
Appendix 6	Summary of HB 4141 Requirements for Documents Submitted to the President	p. 46
Appendix 6a	Plan for How the Governing Board and Administration are Managing Costs	p. 47

Appendix 1 - February TFAB Recommendations Memo

To: Michael Schill, President
From: Jamie Moffitt, Vice President for Finance & Administration and CFO, TFAB Co-Chair, and Kevin Marbury, Vice President for Student Life, TFAB Co-Chair
Date: February 6, 2019
Re: Recommendations of the FY2019 Tuition and Fee Advisory Board (TFAB)
Cc: Jayanth Banavar, Senior Vice President and Provost

This year the Tuition and Fee Advisory Board (TFAB) included five students (one graduate student and four undergraduate students, including the ASUO president and ASUO internal vice president), faculty, deans, vice presidents, vice provosts, and administrative staff engaged in budgeting, institutional research, and financial aid. A list of TFAB members is included at the end of this memo.

The TFAB met nine times, October 2018 through February 2019. All meetings were open to the public. We consistently had guests join our discussions including several students and reporters from the *Daily Emerald*. Fall meetings focused on historical and comparative information, the university budget, mechanisms by which moneys are appropriated by the Legislative Assembly to the Higher Education Coordinating Commission (HECC) for allocation to public universities, campus growth and undergraduate enrollment, cost drivers, a plan for cost management, tuition and fee information, and preliminary planning for the January student forum. Winter meetings covered the Governor's Recommended Budget (GRB), specific proposals for graduate tuition, course fees, mandatory fees, and housing fees, as well planning for and feedback from the student forum. The TFAB also spent significant time discussing various budget and tuition scenarios for FY2020 before developing a recommendation for non-resident undergraduate tuition rates. We will be bringing a recommendation to the university president regarding resident tuition rates in May, once more information is available related to student enrollment and the legislative process.

In addition to nine TFAB meetings, the ASUO and the TFAB hosted a well-attended student forum (approximately 120 people participated) on the tuition-setting process in mid-January. The forum included a presentation that covered a broad range of topics including the university's financial position, decreased levels of state appropriation, FY2020 cost drivers, the Governor's Recommended Budget, and plans for campus growth. Following the presentation, students participated in small group discussions at each table, facilitated by TFAB members and senior staff. Questions and feedback from the small group discussions were compiled, shared, and discussed at subsequent TFAB meetings. A second student forum—hosted by the university president—is being planned for early February.

University Communications staff have been updating the university's tuition website (<https://uoregon.edu/tuition>) throughout the process, uploading documents after every TFAB meeting. The website provides information about the university's budget, including the Education and General (E&G) fund for FY2019, major anticipated cost drivers for FY2020, information on the tuition-setting process, and historical information on tuition and fees. The website also provides the schedule of TFAB meetings, with links to agendas and all relevant documents and data that the TFAB considered during deliberations. Meeting notes from each TFAB session are also posted.

Non-Resident Undergraduate Tuition

In the current fiscal year, FY2019, the E&G fund, which covers the majority of the operations of the academic and administrative functions of the university, is projected to be in deficit, with projected revenues unable to cover projected expenditures by approximately \$5.6 million. The TFAB took the projected deficit into account when analyzing the financial position of the institution for the next year, FY2020. The TFAB also considered the anticipated FY2020 cost drivers (below), as well as projected enrollment and state appropriation levels.

The TFAB analysis of the university's financial position was discussed in the context of historical UO tuition increases and comparisons to tuition and fee costs and structures at peer public institutions.

For FY2020, the following major cost increases are projected in the E&G fund:

Cost Driver	Estimated FY2020 Cost Increase
Faculty, Staff, and Graduate Employee Salaries and Wages	\$10.6 million
Medical Insurance Costs	\$1.9 million
Retirement Costs	\$7.6 million
Institutional Expenses	\$1.0 million
Strategic Investments	\$2.0 million
Minimum Wage Increase	\$1.0 million
Total Projected Cost Increases	\$24.1 million

The total projected cost driver increases for FY2020 are higher than last year (\$16.7 million) due to the fact that the university is subject to significant Public Employees Retirement System (PERS) increases this coming year. The \$24.1 million projected increase represents a 4.45% increase on the overall E&G budget.

There were four high-level issues that the TFAB spent considerable time discussing related to undergraduate tuition rates. They included:

- (1) How much of the projected net revenue from the campus growth plan to assume when recommending tuition rates for next year;
- (2) What level of state appropriation to assume when setting tuition rates;
- (3) Options to effectively cover the anticipated FY2020 funding gap, while taking into consideration the burden on students;
- (4) An acceptable level of funding gap to assume would be covered by cost cutting and other sources of revenue (e.g., increased F&A return, increased graduate tuition revenue)

Campus Growth: The University has made significant investments in recruiting and the number of students applying to the UO has grown this year. However, it remains to be seen how many of these applications will translate into a commitment to attend (via payment of a deposit), which would indicate increased enrollment. If successful, campus growth initiatives could contribute as much as \$7.0 million to \$8.0 million towards closing the institution's FY2020 budget gap. However, before May, when deposit data is available, it is difficult to know how much of this revenue to count on. Seeing significant application growth, last year's TFAB recommendation was counting on approximately \$4.0 million of incremental growth revenue, which did not end up materializing. This year, however, the institution has invested additional resources in recruiting and scholarships to help with this initiative.

State Budget Allocation: Unfortunately, the public universities were "flat-funded" in the Governor's Recommended Budget that was released in November. Due to the way that state funding is allocated over the biennium (49% in year one / 51% in year two), flat-funding actually results in a cut to the UO of approximately \$2.7 million in FY2020. However, the governor also recommended an investment budget in which the universities would receive significant additional funding. If the full investment budget were to be put in place, it is estimated that instead of a cut, the UO would see an increase of approximately \$8.0 million in FY2020. The swing between these two outcomes is \$10.7 million and has the ability to significantly impact the institution's FY2020 budget gap.

Burden on Students: TFAB members spent time discussing the increasing cost of higher education and the burden this places on students. While inflation is a factor that affects pricing costs across most of our economy, it is nevertheless a growing strain on students and their families. The TFAB spent time hearing from students on the committee and at the student tuition forum on this issue and also discussing the fact that many students enter university unaware that they should realistically expect tuition to increase every year. Students expressed there is not enough education done about this reality and it can be very challenging for students, particularly if they are not preparing for it. The TFAB also discussed the fact that rising tuition places a growing strain on students and families, particularly those students who do not receive additional financial aid and must work multiple jobs, in addition to pursuing their academic studies. For such students, even small incremental increases in tuition run the risk of pricing them out of school.

Funding Gap: TFAB members agreed it is not reasonable to expect that tuition increases alone will alleviate the funding gap left by the current shortfall and the projected cost increases for FY2020. Retirement costs account for \$7.6 million of the projected cost increases, and many TFAB members hope that successful lobbying efforts in Salem will help generate increased state support that can be used to offset these cost increases. However, even if the institution were to be successful with both the campus growth initiative and lobbying in Salem, it is likely that there will still be a significant gap that needs to be addressed through other means, including cost cutting. TFAB members discussed the impact that cost cutting efforts have had on campus in the past (e.g., the number of NTTF who lost jobs in prior cuts) and the fact that, while necessary, it is very difficult and ends up impacting people,

programming and services. It was also shared that making additional cuts each year gets more and more difficult as the impact of cumulative cuts means that there are fewer positions to cut in the future that don't risk significantly affecting service levels.

Given all of these uncertainties, the TFAB reviewed and discussed a broad range of scenarios to understand how the level at which non-resident tuition is set might affect other factors (e.g., resident tuition, the gap needing to be covered through cost cutting). Below is a list of some of the scenarios reviewed and discussed.

Existing FY2019 E&G Fund Budget Deficit	FY2020 Projected Cost Drivers	FY2020 Change in State Appropriation	Incremental Funding – Growth Initiative	Resident Tuition Rate Increase	Non-Resident Tuition Rate Increase	Remaining Gap (to be covered by cost cutting and other revenue)
\$5.6 million	\$24.1 million	(\$2.7 million)	\$0	0.0% (\$0 per credit)	0.0% (\$0 per credit)	\$32.4 million
\$5.6 million	\$24.1 million	(\$2.7 million)	\$0	4.15% (\$9 per credit)	2.97% (\$22 per credit)	\$21.9 million
\$5.6 million	\$24.1 million	\$8.0 million	\$8.0 million	4.15% (\$9 per credit)	2.97% (\$22 per credit)	\$3.2 million
\$5.6 million	\$24.1 million	\$3.7 million	\$5.0 million	4.15% (\$9 per credit)	2.02% (\$15 per credit)	\$12.8 million
\$5.6 million	\$24.1 million	\$8.0 million	\$8.0 million	4.15% (\$9 per credit)	2.02% (\$15 per credit)	\$5.5 million
\$5.6 million	\$24.1 million	\$8.0 million	\$5.0 million	4.15% (\$9 per credit)	2.02% (\$15 per credit)	\$8.5 million
\$5.6 million	\$24.1 million	\$3.0 million	\$5.0 million	5.07% (\$11 per credit)	3.51% (\$26 per credit)	\$9.1 million
\$5.6 million	\$24.1 million	\$2.1 million	\$4.0 million	11.98% (\$26 per credit)	3.51% (\$26 per credit)	\$5.9 million
\$5.6 million	\$24.1 million	\$2.1 million	\$4.0 million	11.98% (\$26 per credit)	3.37% (\$25 per credit)	\$ 6.2 million
\$5.6 million	\$24.1 million	\$2.1 million	\$4.0 million	11.98% (\$26 per credit)	2.97% (\$22 per credit)	\$ 7.2 million
\$5.6 million	\$24.1 million	\$2.1 million	\$4.0 million	11.98% (\$26 per credit)	3.1% (\$23 per credit)	\$ 6.8 million
\$5.6 million	\$24.1 million	\$2.1 million	\$4.0 million	11.06% (\$24 per credit)	3.24% (\$24 per credit)	\$ 7.2 million

\$5.6 million	\$24.1 million	\$2.1 million	\$4.0 million	11.52% (\$25 per credit)	3.37% (\$25 per credit)	\$ 6.5 million
\$5.6 million	\$24.1 million	\$2.1 million	\$4.0 million	11.06% (\$25 per credit)	3.24% (\$24 per credit)	\$ 6.8 million
\$5.6 million	\$24.1 million	\$2.1 million	\$4.0 million	11.06% (\$25 per credit)	3.1 % (\$23 per credit)	\$ 7.2 million
\$5.6 million	\$24.1 million	\$2.1 million	\$4.0 million	11.06% (\$25 per credit)	2.97% (\$22 per credit)	\$ 7.5 million
\$5.6 million	\$24.1 million	\$8.0 million	\$4.0 million	5.07% (\$11 per credit)	2.97% (\$22 per credit)	\$ 6.4 million
\$5.6 million	\$24.1 million	\$2.1 million	\$4.0 million	5.07% (\$11 per credit)	2.97% (\$22 per credit)	\$ 12.4 million

Proposed Non-Resident Tuition Increase

With these issues in mind, the TFAB is recommending the following non-resident undergraduate tuition increase:

- \$22 per student credit hour (SCH) increase (2.97%) from \$741 per SCH to \$763 per SCH.
Increases tuition on a full time annual basis to \$34,335 (\$990 increase)

This tuition increase proposal, setting aside 10% of new revenue for fee remissions as is our standard practice, is expected to generate approximately \$7.4 million of incremental revenue. It is important to note that incremental tuition revenue from campus growth is not included in this figure, but the figure does assume steady enrollment from FY2019 to FY2020. It also does include an approximation of increased revenue generated by summer tuition.

In selecting the 2.97% increase for non-resident undergraduates, the TFAB is balancing the need to keep tuition increases as low as possible for students, while generating enough revenue to contribute to next year's upcoming budget gap. The committee felt that higher non-resident rate increases could make the growth initiative, particularly recruitment of new non-resident students, more difficult.

Graduate Tuition

The deans were asked to provide their recommendations for graduate tuition in FY2020. Those increases were reviewed and discussed by the TFAB. With the exception of programs in the College of Design and the School of Law, proposed graduate tuition increases range from 0% to 5.4%.

The College of Design proposed resident tuition increases of between 4.9% and 15%, with some programs' non-resident tuition seeing no proposed increase. The 15% proposed increase for the Architecture, Landscape Architecture, and Historic Preservation programs will make the tuition rates

more reflective of the actual cost of the programs and will only affect incoming resident students who start their programs in fall 2019, all of whom will receive a tuition guarantee. The proposed tuition rate increases will not affect current students whose tuition is already guaranteed to not increase. The requested 7.1% increase in the Sports Product Design program is proposed to cover labor contract and PERS increases as well as to initiate a tuition guarantee for this program, while the 8% Planning, Public Policy and Management program increase will cover cost drivers and a new support staff position. TFAB members were generally supportive of the graduate tuition proposals in the College of Design, discussing the benefit to students of a tuition guarantee while understanding the high risk such a system poses to the university.

The School of Law is proposing a 7% increase for resident and non-resident students in their Juris Doctorate (JD), master's in law (LLM), and Conflict and Dispute Resolution master's programs. The proposed increases bring the programs more in line with market rates while still maintaining the tuition price for students at a lower rate than comparator schools. PERS is the largest cost driver for the tuition increase proposals, alongside increased student need for career development services. The law school also pays \$4,000 for each graduating JD student to complete a bar review course which, in addition to the improved career development services, assists students with employment success after graduation. Like many other public law schools in the current market environment, the UO offers scholarships that cover approximately 50% of tuition, on average, for incoming law students. Challenging market dynamics for law schools and the substantial scholarships given out by law schools have put considerable pressure on the School of Law budget in recent years. Even after the proposed tuition increases, the UO law school will continue to offer the highest ranked law program in the state for the lowest cost.

The TFAB is forwarding these increases to you for your consideration and recommends that they be adopted. The graduate tuition increases are detailed in the attached spreadsheet.

Fee Increases for Existing Mandatory Fees

The TFAB reviewed all of the proposals for mandatory institutional fees, with the exception of the Incidental Fee (which runs through the ASUO process).

Mandatory institutional fee recommendations are as follows:

- Building Fee: no increase
- Health Service Fee: \$35 increase per term from \$198 to \$233 (17.68%)
- Rec Center Bond Fee: no increase
- Rec Center Fee: \$2 increase per term from \$62.50 to \$64.50 (3.2%)
- EMU Fee: \$3 increase per term from \$67 to \$70 (4.48%)
- Technology Fee: no increase

The only significant mandatory fee increase that was proposed is the Health Service Fee. This is in direct response to a large increase in the number of students seeking help for mental and physical health concerns. The proposed fee increase was endorsed by the Student Health Advisory Committee and the Counseling Center's Student Advisory Board. The increased Health Service Fee aims to alleviate waiting periods at the University Health Center and University Counseling Center, ensuring services are more responsive to growing student health needs. This includes funding to fill crucial vacancies at the University Health Center, including staffing to work on all types of dietary needs, including food insecurity. Many members of TFAB endorsed the need for this fee in order to improve services to students.

The Incidental Fee proposal is developed by ASUO and does not run through TFAB review. ASUO leadership has shared that they are proposing that the Incidental Fee increase \$8.75 per term from \$250.50 per term to \$259.25 per term (3.5%).

Other Costs of Education Reviewed

The TFAB reviewed major changes to proposed course fees, as well as projections on housing costs for FY2020. The group discussed a few specific course fees for which concerns existed and this feedback will be incorporated into the Special Fees, Fines and Penalties process for consideration.

Additionally, in FY2020, a fee of \$25 per credit hour on fully online courses is proposed to provide improved quality and consistency of support for student success in these courses. Carol Gering, associate vice provost of online and distance education, presented to the TFAB about how the fee would work and the overall benefits. These include content designed to support the accessibility needs of diverse students, a call/chat center for single point of contact assistance for online students, expanded help desk hours (particularly nights and weekends), expanded access to exam proctoring, support for media-rich content in online courses, flexible delivery of high-demand online courses that support timely degree completion, and consistent student support around technology, processes, and procedures for all UO online classes. TFAB members were generally supportive of this new fee as (1) it will only be applied to students who choose to take online courses, and (2) the investments in online infrastructure will enable the institution to significantly expand and improve online course offerings, which in particular will help non-traditional students and employed students by providing them with more scheduling flexibility.

University Housing presented its proposed room and board rates for FY2020 to the TFAB. They are proposing moderate (average of 4%) rate increases to cover staff and student employee labor and maintenance cost increases. Even with these increases, University Housing plans to continue to offer 54 triple-occupancy room spaces, with full meal plans, for under \$10,000 and 2,300 double-occupancy spaces, with full meal plans, at price points below \$10,400 per year. TFAB members raised concerns about the overall cost of living impact of on-campus housing, particularly for first-year students who

are required to live on campus. The TFAB discussion focused heavily on the live-on requirement for students and the concern that this requirement increases the total financial burden on students. While Housing shared that its comparative data for on-campus vs. off-campus housing costs demonstrate that they are competitive, many students on the TFAB shared that their personal experience was not consistent with this data. They believe that off-campus options, particularly shared apartments, are less expensive. The TFAB spent time discussing these issues, including the goal of the live-on requirement, which is to increase retention and improve academic success for students by helping them to build community and better transition to college life. The fact that students can petition for a waiver of the live-on requirement due to cost pressures was also discussed, but many TFAB members felt that this option was not widely known by incoming students.

Members of the 2018–2019 Tuition and Fee Advisory Board

Aimée C. Marquez	Undergraduate student
Chris Murray	Professor, Special Education and Clinical Sciences
Doneka Scott	Vice Provost for Undergraduate Education and Student Success
Erica Daley	Associate Dean of Finance and Operations, Law School
Imani Dorsey	ASUO Internal Vice President; undergraduate student
Jamie Moffitt	Vice President for Finance and Administration & CFO; co-chair
Janelle Stevenson	Graduate student
Janet Woodruff-Borden	Vice Provost and Dean of the Graduate School
Jim Brooks	Director of Financial Aid
JP Monroe	Director of Institutional Research
Kathie Stanley	Associate Vice President and Chief of Staff, Division of Student Life
Kevin Marbury	Vice President for Student Life; co-chair
Laura Leete	Associate Professor, PPPM; Senate Budget Committee member
Maria Alejandra Gallegos-Chacón	ASUO President; undergraduate student
Philip Scher	Divisional Dean for Social Sciences, College of Arts and Sciences
Sarah Nutter	Dean of the Lundquist College of Business
Stuart Laing	Director of Budget and Resource Planning
Tova Kruss	Undergraduate student

Guests at TFAB meetings October 2018–February 2019

Odalis Aguilar	Student
Debra Beck	Executive Director, University Health Center
Marcilynn Burke	Dean of the Law School,
Ivan Chen	ASUO External Vice President
Donna Chittenden	Program Manager, Budget and Resource Planning
Zack Demars	Student, reporter for the Daily Emerald
Chaucie Edwards	Student
Lizzy Elkins	ASUO Tuition Insecurity Coordinator
Carol Gering	Associate Vice Provost of Online and Distance Education
Becky Girvan	Director, Student Government Engagement and Success
Michael Griffel	Assistant Vice President and Director of University Housing
Emily Halnon	Communications Specialist
Ryan Nguyen	Student, reporter for the Daily Emerald
Semeredin Kundin	Student
Rocco Luiere	Associate Dean of Finance, College of Design
Montse Mendez Higuera	Student
Tan Perkins	ASUO Chief of Staff
Hunter Rowe	Student
Roger Thompson	Vice President for Student Services and Enrollment Management

2018-20 ACADEMIC YEAR TUITION AND FEE INCREASES

ACADEMIC YEAR

	<i>2018-19 Tuition</i>	<i>2019-20 Tuition</i>	<i>Tuition Pct Increase</i>
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GRADUATE (annual tuition and fees at the plateau rate)

COLLEGE OF DESIGN

<i>Architecture & Interior Architecture</i>			
Resident	20,295.00	23,334.00	15.0%
Nonresident	33,984.00	33,984.00	0.0%
<i>Landscape Architecture</i>			
Resident	16,296.00	18,735.00	15.0%
Nonresident	29,985.00	29,985.00	0.0%
<i>Historic Preservation</i>			
Resident	15,297.00	17,586.00	15.0%
Nonresident	28,986.00	28,986.00	0.0%
<i>Art</i>			
Resident	16,431.00	17,241.00	4.9%
Nonresident	17,970.00	18,861.00	5.0%
<i>Sports Product Design</i> ¹			
Resident	32,424.00	34,719.00	7.1%
Nonresident	32,424.00	34,719.00	7.1%
<i>Planning, Public Policy, & Management</i>			
Resident	16,383.00	17,697.00	8.0%
Nonresident	25,884.00	27,960.00	8.0%
<i>History of Art and Architecture</i>			
Resident	15,897.00	16,698.00	5.0%
Nonresident	25,128.00	26,391.00	5.0%

COLLEGE OF ARTS AND SCIENCES

<i>MA/Phd</i>			
Resident	14,526.00	14,958.00	3.0%
Nonresident	26,028.00	26,811.00	3.0%

COLLEGE OF EDUCATION

<i>Base</i>			
Resident	17,514.00	18,243.00	4.2%
Nonresident	24,858.00	26,127.00	5.1%
<i>Supervision</i>			
Resident	18,867.00	19,650.00	4.2%
Nonresident	26,184.00	27,534.00	5.2%
<i>Clinical</i>			
Resident	20,535.00	21,399.00	4.2%
Nonresident	27,771.00	29,202.00	5.2%
<i>DEd</i>			
Resident	17,514.00	18,243.00	4.2%
Nonresident	24,858.00	26,127.00	5.1%

SCHOOL OF JOURNALISM AND COMMUNICATION

<i>MA/PhD</i>			
Resident	15,552.00	16,011.00	3.0%
Nonresident	25,164.00	25,164.00	0.0%
<i>Strategic Communication</i>			
Resident	16,983.00	17,739.00	4.5%
Nonresident	24,435.00	24,435.00	0.0%
<i>Multimedia</i>			
Resident	16,983.00	17,739.00	4.5%
Nonresident	24,435.00	24,435.00	0.0%

Advertising and Brand Management

Resident	15,552.00	16,011.00	3.0%
Nonresident	25,164.00	25,164.00	0.0%

SCHOOL OF LAW*JD*

Resident	33,282.00	35,604.00	7.0%
Nonresident	41,886.00	44,820.00	7.0%

LLM

Resident	41,346.00	44,244.00	7.0%
Nonresident	41,346.00	44,244.00	7.0%

CRES

Resident	20,466.00	21,897.00	7.0%
Nonresident	27,648.00	29,592.00	7.0%

COLLEGE OF BUSINESS*PhD*

Resident	14,364.00	14,364.00	0.0%
Nonresident	24,057.00	24,057.00	0.0%

MBA

Resident	28,377.00	29,235.00	3.0%
Nonresident	39,273.00	40,461.00	3.0%

Accounting

Resident	19,527.00	19,527.00	0.0%
Nonresident	27,627.00	27,627.00	0.0%

*Finance*²

Resident	24,117.00	24,840.00	3.0%
Nonresident	31,617.00	32,565.00	3.0%

*Oregon Executive MBA*³

Resident	38,418.00	40,500.00	5.4%
Nonresident	38,418.00	40,500.00	5.4%

*Sports Product Management*⁴

Resident	37,917.00	39,000.00	2.9%
Nonresident	43,917.00	45,000.00	2.5%

Sports Product Management (ONLINE)

Resident	NEW	31,416.00	
Nonresident		36,417.00	

SCHOOL OF MUSIC AND DANCE*MA/PhD*

Resident	14,382.00	14,808.00	3.0%
Nonresident	22,371.00	23,490.00	5.0%

KNIGHT CAMPUS*Industrial Internship Program*⁵

Resident	19,440.00	19,980.00	2.8%
Nonresident	19,440.00	19,980.00	2.8%

Notes:

(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. AY19 costs are 3.9% higher than AY18.

(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. No cost increase over AY18.

(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.

Source: UO Office of Institutional Research.For additional information, please contact J.P. Monroe (jpmoneoe@uoregon.edu) at 541-346-2085.

Appendix 2 - Sensitivity Analysis

Public University Support Fund (PUSF) and Growth Scenarios

DRAFT ESTIMATES

Question: How much of a recurring budget gap would exist if the resident undergraduate tuition increase were limited to 5%?

- Assumes \$11.6 million of budget cuts implemented in FY20

	\$40.5 million increase to PUSF (co-chairs budget)	\$60 million increase to PUSF	\$80 million increase to PUSF	\$120 million increase to PUSF
90% Success on Non-Resident Growth Target (+163 NR)	(\$15.3 million)	(\$13.5 million)	(\$11.6 million)	(\$7.5 million)
95% Success on Non-Resident Growth Target (+277 NR)	(\$11.9 million)	(\$10.1 million)	(\$8.2 million)	(\$4.1 million)
100% Success on Non-Resident Growth Target (+390NR)	(\$8.4 million)	(\$6.6 million)	(\$4.7 million)	(\$0.6 million)

Question: What would it take to balance remaining FY20 budget gap solely through resident undergraduate tuition increases?

- Assumes \$11.6 million of budget cuts implemented in FY20

	\$40.5 million increase to PUSF (co-chairs budget)	\$60 million increase to PUSF	\$80 million increase to PUSF	\$120 million increase to PUSF
90% Success on Non-Resident Growth Target (+163 NR)	22.5%	20.5%	17.5%	13.5%
95% Success on Non-Resident Growth Target (+277 NR)	18.5%	16.5%	14.0%	9.0%
100% Success on Non-Resident Growth Target (+390 NR)	15.0%	12.5%	10.0%	5.0%

NOTE: A 1% tuition increase on resident undergraduate tuition generates approximately \$750,000. The FY20 PERS increase is estimated at \$7.1M. Thus, the PERS increase alone would equal a 9.47% increase in resident undergraduate tuition if that cost were to be borne entirely by this means.

Appendix 3 - Tuition Calculator

Tuition per SCH

	Resident	Nonresident
2018-19 Tuition	\$ 217	\$ 741
Possible Tuition Increase	\$ 24	\$ 22
Increase as %	11.06%	2.97%
New Tuition per SCH	\$ 241	\$ 763

AY Revenue Estimate

	Resident	Nonresident
FY19 Estimate*	\$ 65,200,000	\$ 241,300,000
FY20 Est w/o growth*	\$ 72,411,060	\$ 248,464,103
Total Est Rev w summer*	\$ 341,100,891	
Total Est Tuition INCREASE*	\$ 15,700,891	

* After Remissions

Full Time Tuition

	Resident	Nonresident
New Full Time (45 SCH)	\$ 10,845	\$ 34,335
Increase in Full Time	\$ 1,080	\$ 990

Summer 2018	\$ 18,900,000
Est New Sum Rev	\$ 1,325,728

\$ (23,600,000)	Cost Drivers
\$ (10,400,000)	Current Shortfall
\$ 15,700,891	New Tuition Rev
\$ 3,000,000	New State Appr
\$ 11,600,000	Announced Cuts
\$ (3,699,109)	Net
\$ 9,200,000	Growth Estimate
\$ (7,000,000)	Decline - Intl Students
\$ 830,089	Extra Financial Aid
\$ (2,329,198)	Net with growth

Appendix 4: Scenarios Reviewed by the TFAB at May 7, 2019 Meeting

Assumptions:

- Updated FY2019 E&G fund projected budget deficit: \$10.4 million
- Updated FY2020 projected cost drivers: \$23.6 million
- Announced cuts to UO budget: \$11.6 million
- Incremental funding – growth initiative: \$ 9.2 million
- Projected decline in international students: - \$ 7.0 million
- Non-resident tuition increase of 2.97% (approved by the Board)

NB: Initial scenarios reviewed by TFAB did not consider additional support funds. Later scenarios considered the idea of new support funds for low-income residents not covered by PathwayOregon. This is shown in the bottom part of the table below.

Public University Support Fund (PUSF) level	Anticipated UO funding from PUSF (using HECC allocation model)	Resident Tuition Rate Increase: %	Resident Tuition Rate Increase: \$ per SCH	New Resident Tuition for Full Time (45 SCH)	New Support Funds for Low Income Residents not Covered by PathwayOregon	Remaining Gap
\$70 million	\$3.0 million	4.61%	\$10	\$10,215	-	\$6.3 million
\$80 million	\$3.9 million	4.61%	\$10	\$10,215	-	\$5.4 million
\$70 million	\$3.0 million	7.83%	\$17	\$10,530	-	\$3.9 million
\$70 million	\$3.0 million	8.29%	\$18	\$10,575	-	\$3.6 million
\$70 million	\$3.0 million	9.68%	\$21	\$10,710	-	\$2.5 million
\$70 million	\$3.0 million	12.9%	\$28	\$11,075	-	\$123K
\$70 million	\$3.0 million	5.07%	\$11	\$10,260	-	\$6.0 million
\$70 million	\$3.0 million	3.23%	\$7	\$10,080	-	\$7.3 million
\$120 million	\$8.0 million	4.61%	\$10	\$10,215	-	\$1.3 million
\$80 million	\$3.9 million	4.61%	\$10	\$10,215	-	\$5.4 million
\$60 million	\$2.0 million	12.44%	\$27	\$10,980	-	\$1.5 million
\$100 million	\$6.0 million	6.45%	\$14	\$10,395	-	\$1.9 million
\$110 million	\$7.0 million	5.53%	\$12	\$10,305	-	\$1.6 million
\$90 million	\$5.0 million	7.35%	\$16	\$10,485	-	\$2.3 million
\$80 million	\$3.9 million	9.68%	\$21	\$10,710	-	\$1.6 million
\$60 million	\$2.0 million	12.9%	\$28	\$11,025	-	\$1.1 million
\$70 million	\$3.0 million	9.68%	\$21	\$10,710	\$727K	\$3.3 million
\$60 million	\$2.0 million	9.68%	\$21	\$10,710	\$727K	\$4.3 million
\$60 million	\$2.0 million	11.52%	\$25	\$10,890	\$864K	\$3.0 million
\$70 million	\$3.0 million	11.06%	\$24	\$10,845	\$830K	\$2.3 million
\$80 million	\$3.9 million	9.68%	\$21	\$10,710	\$727K	\$2.4 million
\$90 million	\$5.0 million	7.83%	\$17	\$10,530	\$589K	\$2.5 million
\$100 million	\$6.0 million	6.45%	\$14	\$10,395	\$486K	\$2.4 million
\$110 million	\$7.0 million	5.53%	\$12	\$10,305	\$417K	\$2.0 million
\$120 million	\$8.0 million	4.61%	\$10	\$10,215	\$348K	\$1.7 million

Appendix 5 - TFAB Meeting Summaries

Tuition and Fee Advisory Board of the University of Oregon Meeting Summary | October 9, 2018

The 2018–2019 Tuition and Fee Advisory Board (TFAB) of the University of Oregon met at the Miller Room (107) in the Erb Memorial Union on the UO's Eugene campus on October 9, 2018. Below is a summary of the meeting; documents reviewed during the meeting are available [online](#).

Attending: Odalis Aguilar (guest), Jim Brooks, Imani Dorsey, Maria Alejandra Gallegos-Chacon, Emily Halnon (guest), Tova Kruss, Stuart Laing, Kevin Marbury (co-chair), Jamie Moffitt (co-chair), J.P. Monroe, Chris Murray, Ryan Nguyen (guest), Sarah Nutter, Philip Scher, Doneka Scott, Kathie Stanley, Janelle Stevenson, Janet Woodruff-Borden

Staff: Debbie Sharp (Office of the VPFA)

Welcome and introductions. Co-chair Kevin Marbury, vice president for student life, welcomed the group and invited all participants to introduce themselves. The 2018–2019 TFAB membership list is available [online](#); all meetings are open to non-members.

Charge. Co-chair Jamie Moffitt, vice president for finance and administration/chief financial officer, walked the group through the [TFAB Guiding Principles document](#). She provided the charge to the group, explaining that TFAB is an advisory group to the president, who makes recommendations to the Board of Trustees, which is responsible for decisions regarding tuition. If the Board decides to raise undergraduate, resident tuition by more than 5%, this decision would need to be approved by the Higher Education Coordinating Committee (HECC). Moffitt explained that TFAB reviews all proposals for graduate tuition increases, mandatory fee increases, housing cost increases, and major course fee increases. The advisory group is also responsible for generating a recommendation on undergraduate tuition rates.

Calendar. Moffitt discussed the [anticipated TFAB meeting calendar](#) for the year, explaining that the October and November meetings will focus on background budget and cost information, and will also provide members with time to prepare for the student forum(s). Moffitt guided TFAB members through the rest of the calendar, including weekly meetings in January and early February for the student forum(s) and reviewing fee proposals.

Moffitt noted that the President has made a change to the tuition proposal schedule for this year given the significant uncertainty facing the institution. This coming year will be a challenging year as PERS rates are going up significantly and many important revenue and cost factors including state appropriation, enrollment projections, as well as several labor contracts will not be complete when tuition needs to be set. For this reason, and to avoid having to set a very large initial resident undergraduate tuition rate, the President has asked that TFAB wait to provide him with a recommendation about resident undergraduate tuition rates until early May, when better information should be available about (1) May enrollment deposits / projected enrollment, and (2) likely state appropriation levels. See [President Schill's September 21, 2018 memo to the Board of Trustees](#) for more details.

In early February, TFAB will make recommendations to the President related to graduate tuition, mandatory fees, housing costs, significant course fees, and non-resident, undergraduate tuition rates. The advisory board will continue to meet in March, April, and May and—using enrollment and other information available during that time period—will develop recommendations for the president regarding resident undergraduate tuition in early May. The President will then go through normal campus processes to review the advice and counsel of TFAB, receive feedback from the campus community, and provide the Board with a recommendation related to undergraduate resident tuition rates in early June.

Historical and comparative information. J.P. Monroe, director of institutional research, Office of Institutional Research, provided an overview of the historical and comparative data regarding the relationship between the amount of resident tuition and mandatory enrollment fees charged by the UO and the amount of state appropriation that the Higher Education Coordinating Commission (HECC) allocates to the UO. He also provided other detailed historic and comparative data for the advisory board. This information is available [online](#).

Budget information. Moffitt gave a brief overview of the UO budget structure, explaining the distinction between the education and general (E&G) funds and other funds. The overview is available [online](#).

Adjournment. The meeting adjourned at 1:30 p.m.

Tuition and Fee Advisory Board of the University of Oregon Meeting Summary | October 30, 2018

The 2018–2019 Tuition and Fee Advisory Board (TFAB) of the University of Oregon met at the Miller Room (107) in the Erb Memorial Union on the UO’s Eugene campus on October 30, 2018. Below is a summary of the meeting; documents reviewed during the meeting are available [online](#).

Attending: Odalis Aguilar (guest), Jim Brooks, Imani Dorsey, Maria Alejandra Gallegos-Chacon, Emily Halnon (guest), Tova Kruss, Stuart Laing, Kevin Marbury (co-chair), Jamie Moffitt (co-chair), J.P. Monroe, Chris Murray, Philip Scher, Kathie Stanley, Janelle Stevenson

Staff: Debbie Sharp (Office of the VPFA)

Welcome and introductions. Co-chair Kevin Marbury, vice president for student life, welcomed the group and invited all participants to introduce themselves.

Budget information. Co-chair Jamie Moffitt, vice president for finance and administration/chief financial officer gave an overview of the budget of the University of Oregon. Key points discussed included the increase in tuition costs for students as a result of decreased funding from the state; the increasing dependence on non-resident tuition; and the projected rise in costs associated with funding PERS (Public Employees Retirement System). Participants discussed the way the UO PERS costs are calculated; how Oregon compares to other states with underfunded public employee retirement plans; and how long PERS increases are anticipated to continue.

PUSF and funding mechanisms. Moffitt provided an overview of the Public University Support Fund (PUSF), explaining the mechanisms by which moneys are appropriated by the Legislative Assembly to the Higher Education Coordinating Commission for allocation to public universities. Participants discussed the three components of the PUSF at length: activity-based funding, outcomes-based funding, and mission differentiation funding. Other operating funds outside of the PUSF were also discussed, including state programs, statewide public service programs, and Oregon sports lottery funding. Dialogue focused on working collectively to increase the size of the funding pool and encouraging reviews of the cost-weighting factors and Student Success Completion Model.

Adjournment. The meeting adjourned at 1:15 p.m.

Tuition and Fee Advisory Board of the University of Oregon
Meeting Summary | November 9, 2018

The 2018–2019 Tuition and Fee Advisory Board (TFAB) of the University of Oregon met in the Johnson Hall Conference Room at 8:30am on the UO’s Eugene campus on November 9, 2018. Below is a summary of the meeting; documents reviewed during the meeting are available [online](#).

Attending: Odalis Aguilar (guest), Ivan Chen (guest), Erica Daley, Lizzy Elkins (proxy for Imani Dorsey), Tova Kruss, Stuart Laing, Kevin Marbury (co-chair), Aimée C. Marquez, Montse Mendez (guest), Jamie Moffitt (co-chair), J.P. Monroe, Ryan Nguyen (guest), Sarah Nutter, Hunter Rowe (guest), Philip Scher, Janelle Stevenson, Janet Woodruff-Borden

Staff: Debbie Sharp (Office of the VPFA)

Welcome and introductions. Co-chair Kevin Marbury, vice president for student life, welcomed the group and invited all participants to introduce themselves.

Growth initiative. Co-chair Jamie Moffitt, vice president for finance and administration/chief financial officer, spent the majority of the meeting leading the group through a presentation and discussion of budget issues, including cost drivers, tuition revenue, and potential ways to close budgetary gaps, including campus growth. She shared with TFAB the Fall 2017 presentation that was made to the UO Board of Trustees regarding Campus Growth.

Cost drivers reviewed included faculty and staff salary and wages, GE salary and benefits, medical costs, the rising costs of PERS (Public Employees Retirement System), institutional expenses, and strategic investments and investments in tenure track faculty.

Discussions around revenue noted the increasing reliance on tuition—particularly nonresident tuition—in the face of declining state appropriations. Moffitt detailed various ways that the institution has been working to close the future projected budget gap, including launching new graduate programs, expanding online offerings, and instituting a number of cost cutting initiatives. However, while each of these efforts helps contribute to the financial stability of the institution, none of them is likely to be large enough to close the future funding gap created by expected PERS increases.

Finally, Moffitt discussed campus growth as another potential way to deal with budgetary issues. The current campus growth plan involves adding 3,000 students over a period of eight years, with required corollary investment in recruiting, a classroom and faculty office building, expanded residence hall capacity and additional faculty and staff. If successful, this plan would help close the projected budget gap. However, one of the issues that TFAB will need to discuss is the risk associated with counting on this growth plan. This is one of the reasons the decision was made to shift the timing of the undergraduate, resident tuition recommendation until information is available about student deposits and projected fall 2020 enrollment. The presentation is available [online](#).

Enrollment update. Moffitt gave an overview of undergraduate enrollment at the University of Oregon, sharing enrollment numbers for Fall 2016, Fall 2017, and Fall 2018. These numbers were discussed in terms of freshmen, transfers, continuing students, and total undergraduates. The data is available [online](#).

January–February 2019 meeting schedule. Moffitt shared the draft TFAB meeting schedule for January–early February 2019, which is available [online](#).

Adjournment. The meeting adjourned at 9:50am.

**Tuition and Fee Advisory Board of the University of Oregon
Meeting Summary | November 16, 2018**

The 2018–2019 Tuition and Fee Advisory Board (TFAB) of the University of Oregon met in the Johnson Hall Conference Room at 8:30am on the UO’s Eugene campus on November 16, 2018. Below is a summary of the meeting; documents reviewed during the meeting are available [online](#).

Attending: Jim Brooks, Erica Daley, Zack Demars (guest), Lizzy Elkins (guest), Emily Halnon (guest), Tova Kruss, Stuart Laing, Laura Leete, Sarah Nutter, Kevin Marbury (co-chair), Aimée C. Marquez, Jamie Moffitt (co-chair), J.P. Monroe, Chris Murray, Kathie Stanley, Janelle Stevenson, Janet Woodruff-Borden

Staff: Debbie Sharp (Office of the VPFA)

Welcome and introductions. Co-chair Jamie Moffitt, vice president for finance and administration/ chief financial officer, welcomed the group and invited all participants to introduce themselves.

Cost drivers analysis. Moffitt reviewed the major FY2020 Education and General (E&G) fund cost drivers, explaining that these figures do not include all costs that will increase at the university (e.g., decisions made by individual departments to invest in new projects), but rather the large known costs such as negotiated salary increases with labor unions and health care costs that generally increase each year. She reminded the group that the E&G Fund is supported by tuition and state appropriation and that in the current year (FY19) there is likely to be a gap between projected revenue and projected expenses. This increases financial pressure to either cut costs or find other ways to cover the gap because while the University can handle a deficit for a year or two, it cannot operate on an ongoing basis with a deficit. Moffitt explained that the projected cost increases for the E&G fund for FY20 total \$24.1 million, which is an overall percentage increase of 4.45%. She also noted that departments funded outside of the E&G fund (e.g., Housing, Athletics, EMU, etc.) will face this same set of cost drivers, but will be responsible for covering these increases with their own funds. Tuition funds will not be used to cover these increases. The FY2020 E&G Cost Driver presentation is available [online](#).

Cost management plan. Moffitt then provided participants a plan for how the governing board and UO leadership are managing costs on an ongoing basis, in accordance with House Bill 4141. The plan details five major efforts being made on an ongoing basis by the Board of Trustees and university administration. Explaining that the Board annually reviews projected expenditures for the upcoming fiscal year, Moffitt shared a [document](#) showing FY19 projected operating budget expenditures and revenues. Moffitt then provided the [FY18 E&G Fund Year in Review](#) and the [Finance Summary for Q4 FY2018](#), explaining that the Board of Trustees quarterly reviews financial projections against actual spending rates. TFAB members learned that the Board of Trustees receives benchmarking information comparing UO staffing levels to those of public peer institutions. Finally, Moffitt explained that the Board of Trustees and leadership regularly discuss cost-saving initiatives and review costs, including state-mandated costs such as PERS (Public Employees Retirement System) and PEBB (Public Employees Benefit Board). The cost management plan is available [online](#).

Undergraduate - tuition calculator. Moffitt provided an overview of an undergraduate tuition calculator that TFAB will be using extensively in discussions during future meetings. The calculator assumes stable enrollment patterns and provides TFAB members with the ability to assess how various combinations of assumptions (e.g., state appropriation levels, resident tuition rates, non-resident tuition rates, enrollment growth, etc.) affect the institution's overall financial position.

Planning for Student Forum(s). Finally, TFAB members started planning for the January student forum. The session will most likely be held one night during the second week of winter term to ensure that as many students as possible can attend. The purpose of the student forum is to provide students with information about the university budget, FY2020 costs drivers, and other tuition and fee related information, and to gather input from them. TFAB members spent time discussing what information would be most useful to share with students during this session.

Adjournment. The meeting adjourned at 10:00am.

**Tuition and Fee Advisory Board of the University of Oregon
Meeting Summary | January 11, 2019**

The 2018–2019 Tuition and Fee Advisory Board (TFAB) of the University of Oregon met in the Johnson Hall Conference Room at 4:00pm on the UO’s Eugene campus on January 11, 2019. Below is a summary of the meeting; documents reviewed during the meeting are available [online](#).

Attending: Odalis Aguilar (guest), Jim Brooks, Erica Daley (by phone), Zack Demars (guest), Imani Dorsey, Lizzy Elkins (guest), Maria Alejandra Gallegos-Chacón, Becky Girvan (guest), Tova Kruss, Stuart Laing, Laura Leete, Sarah Nutter, Kevin Marbury (co-chair), Aimée C. Marquez, Jamie Moffitt (co-chair), J.P. Monroe, Chris Murray, Tan Perkins (guest), Philip Scher, Doneka Scott, Kathie Stanley, Janelle Stevenson, Janet Woodruff-Borden

Staff: Debbie Sharp (Office of the VPFA)

Welcome and introductions. Co-chair Jamie Moffitt, vice president for finance and administration/ chief financial officer, welcomed the group and invited all participants to introduce themselves.

TFAB schedule in January and February. Moffitt reviewed the [revised draft January-February TFAB meeting schedule](#), emphasizing that agenda items are likely to shift during this period of weekly meetings. She gave an overview of the process, which involves five TFAB meetings in January and February and a Student Forum. At the end of January the TFAB co-chairs will draft a recommendation memo to the president regarding the topics discussed by TFAB. The Committee will have an opportunity to provide suggested edits to the memo to ensure that it accurately reflects the advisory group’s activities and discussion. Moffitt noted for the group that they will be under a tight timeline to review the memo given the Board of Trustees meeting schedule.

EMU fee proposal. Kevin Marbury, vice president for Student Life, presented the FY2020 fee projection proposal for the Erb Memorial Union (EMU), which is available [online](#). Marbury outlined the request, which is for a \$3.00 increase to help cover bond payments on the EMU facility. The balance of the anticipated shortfall will be covered by other revenue. Questions raised by TFAB members include how the EMU budget operates, what would happen to the increased EMU fee if enrollment dramatically increased, and how this increase compares to general increase requests to TFAB. Marbury explained that the EMU is not requesting funds to completely cover the shortfall and that reserve funds are being used to offset increases. Finally, Marbury reminded the group that the EMU did not request an increase last year.

Physical Education and Recreation fee proposal. Kevin Marbury went on to present the 2019–20 fee projection proposal for the Department of Physical Education and Recreation (PEREC), which is available [online](#). The department is requesting a \$2.00 increase to the Rec Center Fee, which will help to cover increases in staff wages, benefits, and overhead assessment rates. Similar to the EMU, PEREC did not request an increase last year. The department plans to cover some increases with operational reserves and increased self-generated revenue. TFAB members asked questions around student enrollment assumptions, use of the rec center related to enrollment, and whether it is feasible to target increased

funding (and use) of the facility by community members—in the latter case, Marbury explained that students are the first priority for the department.

Governor's recommended budget. Moffitt took some time to give an overview of the Governor's Recommended Budget (GRB) as well as a second "investment budget" that the governor proposed. She explained that in the GRB rather than receiving an increase, universities in Oregon were "flat funded," meaning that the funding level for FY20–FY21 would be the same as the funding level for FY18–FY19. This means that no increases were provided for cost drivers such as salary increases, PERS, or PEBB. Additionally, due to the way the funds are distributed in the GRB (49% in the first year of the biennium and 51% in the second year of the biennium), the university would actually see a cut of around \$2.7 million in state appropriation between this year and next year. She further noted that if the governor's investment budget passes, the PUSF (Public University Support Fund) would receive an estimated \$120 million more (for seven campuses for both years of the biennium), which would cover the increased PERS expenses. Moffitt noted that this situation leaves the UO with a lot of uncertainty and that in FY20, the university is looking at a funding gap of approximately \$32.4 million.

Planning for the Student Forum. For the remainder of the meeting, TFAB members focused on planning for the student forum, scheduled for Tuesday, January 15, 6pm–7:30pm in the Redwood Auditorium of the EMU. The group decided to open with a welcome and introductions, follow with a budget presentation, spend some time on table discussions noting students' feedback, and then end with a short information session on legislative advocacy.

Adjournment. The meeting adjourned at 5:30pm.

Tuition and Fee Advisory Board of the University of Oregon
Meeting Summary | January 18, 2019

The 2018–2019 Tuition and Fee Advisory Board (TFAB) of the University of Oregon met in the Johnson Hall Conference Room at 3:00pm on the UO’s Eugene campus on January 18, 2019. Below is a summary of the meeting; documents reviewed during the meeting are available [online](#).

Attending: Jim Brooks, Marcilynn Burke (guest), Erica Daley, Zack Demars (guest), Imani Dorsey, Lizzy Elkins (guest), Maria Alejandra Gallegos-Chacón, Emily Halnon (guest) Tova Kruss, Stuart Laing, Laura Leete, Rocco Luiere (guest), Sarah Nutter, Kevin Marbury (co-chair), Aimée C. Marquez, Jamie Moffitt (co-chair), Doneka Scott, Kathie Stanley, Janet Woodruff-Borden

Staff: Debbie Sharp (Office of the VPFA)

Welcome and introductions. Co-chair Kevin Marbury, vice president for student life, welcomed the group and invited all participants to introduce themselves.

Student Forum Feedback. Kevin Marbury thanked everyone for their participation as facilitators and notetakers during the January 15th student forum and asked for feedback on the event. Participants commented on the successful ASUO and Student Life outreach and coverage in *The Daily Emerald* in contributing to record student turnout for a TFAB student forum (approximately 120 people). Feedback on forum table discussions included: rumors concerning a potential 20% tuition increase; requests to improve the usability of the [TFAB website](#); finding ways to increase student understanding of the tuition-and-fee-setting process; FAQs linked to relevant cost drivers and tuition-related data; improved information on Pathway and scholarships; outline of the TFAB process online; and anticipating rising costs of attending university. A summary of Student Forum feedback is available [online](#).

Revised Meeting Schedule. Jamie Moffitt, vice president for finance and administration and CFO, went briefly through the revised TFAB meeting schedule, explaining that staff would do their best to get members relevant materials to review at least 24–48 hours in advance.

Graduate tuition summary. Moffitt briefly discussed the overview of graduate tuition proposals, which is available [online](#). She explained that unlike undergrad tuition, where there is one base schedule for residents and non-residents, the graduate programs each have their own tuition schedules as they operate in distinct markets and each program has its own cost structure. Moffitt noted that there are close to 50 different graduate tuition schedules. She shared a summary of all of the proposed tuition increases for the graduate programs and noted that representatives from the College of Design and Law School had been invited to speak to TFAB because their proposed rates were on the higher end of the spectrum of percentage increases.

College of Design. Rocco Luiere, Associate Dean of Finance in the College of Design, explained that there are seven different graduate programs in the College of Design, each with two different billing rates. Luiere shared that for Architecture, Landscape Architecture, and Historic Preservation, the proposed increase of 15% is for resident students only, will only affect students starting in Fall 2019—all of whom will have a tuition guarantee, and brings the program in line with market rates. It will not affect current students. He noted that the Sports Product Design program is asking for an increase of 7.1% to cover labor contract and PERS increases. Luiere explained that the PPPM program is requesting an 8% tuition increase to cover cost drivers and a staff position providing basic departmental support for faculty in the program.

Law School. Marcilynn Burke, Dean of the Law School, presented tuition increase proposals for the JD, LLM, and Conflict Resolution programs, noting that UO has the highest ranked law school in the state of Oregon and is providing the best law education at the lowest cost. She noted that PERS is the largest cost driver for the tuition increase proposals. She also explained that the Law School pays \$4,000 for each graduating JD student to complete a bar review course and that increased student needs require improved career development services—to increase assistance for students to find jobs after graduation. Dean Burke noted that even after the increase, the UO Law School residential tuition will still be less than comparative schools. Discussions ensued concerning market changes for law and the substantial scholarships given out by law schools—the UO discount rate covers about 50% of tuition on average. Moffitt also shared that the budget for the law school has been extremely challenging in recent years given market dynamics.

Moffitt asked TFAB members to review the summary of graduate tuition proposals in case members would like any other colleges or schools to present their proposals to TFAB. Janet Woodruff-Borden, Dean of the Graduate School, explained that of the 3,700 graduate students, many are graduate employees (GEs) and receive full tuition remissions. Moffitt further noted that in recent years graduate enrollment has not been very stable so graduate programs represent an unpredictable source of revenue for the university (i.e. in some years despite a graduate tuition rate increase, overall graduate tuition revenue did not rise). Moffitt then reiterated that TFAB is not responsible for formally approving graduate tuition proposals, however, any issues or concerns that TFAB members raise related to the proposals will be noted in the memo to the President. Members discussed the concept of a tuition guarantee, arguing that it helps students have some stability, but noted that it presents a very high risk to the university. All 2019–2020 graduate tuition proposals are available [online](#).

More Student Forum Feedback. The group returned to discussing feedback from the January 15th student forum, particularly regarding undergraduate non-resident tuition, which TFAB will make a recommendation on separately from undergraduate resident tuition. Also under discussion was the fact that most scholarships are awarded on a flat dollar amount basis, and that students may be unaware of increasing annual costs and the fact that many scholarships are not indexed to tuition.

Adjournment. The meeting adjourned at 4:32pm.

Tuition and Fee Advisory Board of the University of Oregon
Meeting Summary | January 23, 2019

The 2018–2019 Tuition and Fee Advisory Board (TFAB) of the University of Oregon met in the Johnson Hall Conference Room on the UO’s Eugene campus at 8:30am on January 23, 2019. Below is a summary of the meeting; documents reviewed during the meeting are available [online](#).

Attending: Odalis Aguilar (guest), Deb Beck (guest), Jim Brooks, Donna Chittenden (guest), Erica Daley, Zack Demars (guest), Imani Dorsey, Chaucie Edwards (guest), Lizzy Elkins (guest), Maria Alejandra Gallegos-Chacón, Carol Gering (guest) Michael Griffel (guest), Emily Halnon (guest), Tova Kruss, Kevin Marbury (co-chair), Aimée C. Marquez, Jamie Moffitt (co-chair), JP Monroe, Chris Murray, Tan Perkins (guest), Doneka Scott, Janelle Stevenson, Kathie Stanley, Roger Thompson (guest), Janet Woodruff-Borden

Staff: Debbie Sharp (Office of the VPFA)

Welcome and introductions. Co-chair Jamie Moffitt, vice president for finance and administration and CFO, welcomed the group and invited all participants to introduce themselves. She noted that the meeting would commence with a discussion of housing fees, which is not a mandatory fee but affects a large number of students. Moffitt suggested TFAB next consider the summary list of 2019–20 mandatory fees and proposals received and the Student Health Service Fee proposal. She then suggested TFAB review the special fees and fines, and course fees, leaving time for Carol Gering, associate vice president of online and distance education in the provost’s office, to explain and take questions on the proposed new online course fee. Finally, Moffitt noted that she hoped to reserve time for a discussion on undergraduate tuition.

Housing fee proposal. Roger Thompson, vice president for student services and enrollment management introduced the housing fee proposal, noting that across the division, not many fee increases were being proposed. He explained that during the last two years, 50% of the housing inventory has been held at the same rate, which has resulted in the UO having the lowest room and board rates in the Pac-12. He further noted that even after the proposed housing increase, they expect the UO rates to still be the lowest in the Pac-12. Michael Griffel, assistant vice president and director of university housing, gave an overview of the various room types and dining plan options, which aim to give students as many options as possible to meet their needs and ability to pay.

Questions raised by TFAB members included specifics about meal plans, a first-year student’s ability to use cost as a basis for petitioning to live off-campus, the student success rationale behind the on-campus residence requirement for freshmen, and the correlation between increasing housing rates and improved quality and availability of student housing. Thompson clarified that rates are increasing because 50% of the housing stock has had no increases for two years while there have been increases in labor costs for professional and student staff, as well as significant maintenance costs. Discussions ensued concerning market analysis comparisons regarding local housing costs and the importance of ensuring that UO housing remains competitive. Thompson explained that housing fees help pay for the maintenance costs of older buildings as well as the phased demolishing, updating, and rebuilding of

new buildings He noted that the unit is doing everything possible to keep costs down and to avoid significantly raising rates for students.

Concerns were raised by some TFAB members about differences between on-campus and off-campus housing costs. In particular, many students were concerned about the overall cost of on-campus housing, particularly given the live-on requirement for first year students. Discussion centered around the competitiveness of the rate structure of on-campus housing vs. off campus options. TFAB also discussed that while students can apply for a waiver to the live-on requirement based on cost considerations, this option is not well known. The [housing fee proposal](#) and supplemental documents are available [online](#).

Mandatory fees. Moffitt shared the 2019–20 Fee Increase Summary document (available [online](#)), explaining that the document shows the fee rate proposals received to date, including percentage and dollar changes. She reminded TFAB members that the School of Law is on a semester system (hence the larger per semester charges) and that the incidental fee is still being decided—through an ASUO process.

Health and counseling fee proposal. Thompson summarized the Student Health Service Fee proposal, explaining that the request is for \$35 per term and results directly from increasing concern around mental and physical health issues. He explained that more students are seeking help for mental health issues and that the ASUO concerns around physical and mental health were taken into consideration. Thompson noted that the Student Health Advisory Committee and Student Advisory Board endorsed the proposed fee increase. TFAB discussions noted the scales of charts used to depict health measures, the waiting period at the University Health Center, the need to be responsive to student demands, and the importance of intersectionality in health issues. The Student Health Fee proposal is [online](#).

Course fees. Moffitt explained that TFAB reviews a summary of the class-related fees for the 2019–20 academic year and 2020 summer session (available [online](#)). She noted that there are open public hearings on the full book of fees and that the Budget and Resource Planning unit provides the summary of class-related fees. Donna Chittenden, program manager with Budget and Resource Planning, gave an overview of the document, noting the cancelled fees, new fees, and amended fees. She highlighted one proposed fee: an \$80 fee proposed by International Studies to purchase a DNA genetic testing and analysis kit from *23andMe*. It was recommended that this fee not be approved because sale prices are often lower, allowing students to source the kit at lower prices. Following discussions, Moffitt summarized the group's recommendation, which was that if there are no quality issues, it is better to have people buy the kit directly rather than include the price as part of course fees. Chittenden shared information on the annual open forum to comment on proposed changes to course fees and non-instructional-related fees and fines cited in the Special Fees, Fines, Penalties and Service Charges Fee Book: February 18 from 9am and February 19 from 3pm—both in 260 Condon Hall.

Online Course Fee. Moffitt explained that in previous years the UO has had a decentralized approach to online education and has lacked a holistic strategy across the institution. She shared that the University has hired Carol Gering, associate vice provost of online and distance education, to develop a more cost effective and streamlined approach to online and education across the institution. Gering shared plans

to add online courses to offer scheduling flexibility, increase timely graduation, and provide consistent student support around the technology, processes, and procedures for all UO online classes. The memo on the proposed online course fee is available [online](#). Discussions focused on the positive impacts that online courses have on students in terms of scheduling flexibility and recruiting non-traditional students. Members also discussed the importance of ensuring students have the choice of in-person as well as online courses, analyzing how online courses affect student success, focusing online course availability in lower division classes to help alleviate bottlenecks, and offering students value in terms of increased flexibility and options.

Undergraduate tuition. Moffitt noted that there was not enough meeting time remaining in the meeting to discuss undergraduate tuition. She urged the group to spend time using the tuition calculator to explore scenarios for non-resident tuition rates because TFAB needs to make recommendations by the end of next week. Moffitt noted that the group should consider growth assumptions and options for state appropriations, and bring preliminary ideas to the next meeting (1/30). She also reminded members that the funding gap figures indicate the level of other revenue increases and cost cutting that would be necessary to balance the budget.

Adjournment. The meeting adjourned at 9:58am.

**Tuition and Fee Advisory Board of the University of Oregon
Meeting Summary | January 30, 2019**

The 2018–2019 Tuition and Fee Advisory Board (TFAB) of the University of Oregon met in the Johnson Hall Conference Room on the UO's Eugene campus at 8:30am on January 30, 2019. Below is a summary of the meeting.

Attending: Odalis Aguilar (guest), Erica Daley, Zack Demars (guest), Imani Dorsey, Lizzy Elkins (guest), Maria Alejandra Gallegos-Chacón, Emily Halnon (guest), Tova Kruss, Stuart Laing, Kevin Marbury (co-chair), Aimée Marquez, Jamie Moffitt (co-chair), JP Monroe, Chris Murray, Sarah Nutter, Tan Perkins (guest), Philip Scher, Kathie Stanley, Janet Woodruff-Borden

Staff: Debbie Sharp (Office of the VPFA)

Welcome and introductions. Co-chair Jamie Moffitt, vice president of finance and administration and CFO welcomed the group and invited all participants to introduce themselves.

Undergraduate Tuition. Moffitt provided an overview of the meeting plan, which focused on examining various scenarios to help the group come up with recommendations for non-resident undergraduate tuition. She also noted the tight timeline for the coming week: the draft memo should go out from the co-chairs to TFAB on Friday night or Saturday morning; suggested edits should be submitted by midday on Monday; the next draft will go out on Monday night and any other comments should be submitted to co-chairs on Tuesday. Moffitt explained that ideally the memo should go to the president on Wednesday, giving Communications enough time to circulate the memo and notify campus of the President's Tuition Forum.

Kevin Marbury, vice president for student life, noted that the President's Tuition Forum is scheduled for 6pm on Monday, February 11 in the Redwood Auditorium and is an opportunity for the president to receive feedback on the TFAB memo before he makes his tuition recommendations to campus and to the Board. Moffitt explained that the president's recommendations will go online later that week, allowing campus time to give feedback before the president makes his final decision on recommendations to the Board of Trustees (BOT). She noted that the BOT meets on March 4th and 5th, during which the president's recommendations on tuition will be reviewed. When asked how closely the President and Board tend to follow TFAB's recommendations, Moffitt shared that the TFAB recommendations are usually followed quite closely. However, she emphasized that TFAB's recommendations are advisory to the president and the president's recommendations are advisory to the board; the president and the board each have the authority to consider relevant advice and feedback and are not required to approve the recommendations that they are given.

Returning to the topic of TFAB's memo to the president, Moffitt noted that TFAB co-chairs will do their best to incorporate the suggested edits of TFAB members into the memo. She shared that there is also the option for any TFAB members to submit a second memo to the president if they'd like to express their views directly.

Tan Perkins, chief of staff of the ASUO, provided an overview of the ASUO process to set the Incidental fee (I-Fee), which covers the cost of running the student government and also provides support to student groups who submit budget requests. Tan noted that the ASUO is looking at an operating deficit this year and therefore anticipates using the student reserve to ensure the I-Fee increase is under 5%.

Examining tuition scenarios. Before looking at specific tuition scenarios, Moffitt explained how the tuition calculator works, with the anticipated cost drivers and current budget shortfall accounted for, and allowing for various scenarios based on different assumptions regarding potential growth and state appropriations, and resident and non-resident tuition. She also noted that the model assumes that the student population is stable, whereas it has been decreasing in the last few years. Moffitt explained that in most years there has been a remaining gap that needs to be covered through increases in other revenue and/or cost cutting. When asked, Moffitt explained that in the past, TFAB members often ended up with figures that resulted in a gap range of \$3 - \$6 million but generally not higher than that. TFAB members discussed the likelihood of whether the full investment budget would be implemented and all of the things that would need to occur for this to be possible (e.g., more revenue identified, higher education included in the investment budget, etc.). Moffitt reiterated that there is a great deal of uncertainty this Spring related to the institution's budget. TFAB members discussed the fact that UO non-resident undergraduate tuition is currently priced on par with other schools and raising it too much could affect enrollment.

TFAB members discussed various scenarios, as summarized below, all assuming a \$5.6 million current year E&G fund deficit.

Existing FY2019 E&G Fund Budget Deficit	FY2020 Projected Cost Drivers	FY2020 Change in State Appropriation	Incremental Funding – Growth Initiative	Resident Tuition Rate Increase	Non-Resident Tuition Rate Increase	Remaining Gap (to be covered by cost cutting and other revenue)
\$5.6 million	\$24.1 million	(\$2.7 million)	\$0	0.0% (\$0 per credit)	0.0% (\$0 per credit)	\$32.4 million
\$5.6 million	\$24.1 million	(\$2.7 million)	\$0	4.15% (\$9 per credit)	2.97% (\$22 per credit)	\$21.9 million
\$5.6 million	\$24.1 million	\$3.7 million	\$5.0 million	4.15% (\$9 per credit)	2.02% (\$15 per credit)	\$12.8 million
\$5.6 million	\$24.1 million	\$8.0 million	\$5.0 million	4.15% (\$9 per credit)	2.02% (\$15 per credit)	\$8.5 million
\$5.6 million	\$24.1 million	\$3.0 million	\$5.0 million	5.07% (\$11 per credit)	3.51% (\$26 per credit)	\$9.1 million
\$5.6million	\$2.4 million	\$3.7 million	\$5.0 million	0.0% (\$0 per credit)	2.02% (\$15 per credit)	\$15.9 million

TFAB members discussed a number of issues, including the increase in applications, the possibility of reducing tuition and trying to make up the resulting very large budget deficit with more students, how long the UO could run a deficit if the funding gap were not closed, and options for cutting costs. Other factors discussed include the impact of the Knight Campus, the use of the application fee by Enrollment Management, the impact of recent administrative cost-cutting measures, the importance of preserving the educational mission of the UO, and the value of offering recurring scholarships to ensure students and parents have cost predictability. TFAB members also discussed the fact that the large size of the funding gap means that tuition alone cannot be expected to cover it all, and that cost cutting measures can also not possibly make up the entire difference without seriously affecting programs offered at the UO.

Members spent a lot of time considering the perspectives of resident and non-resident students adversely impacted by increasing costs in higher education. This was discussed in relation to cost and educational quality comparisons with AAU public and Pac-12 schools, and the potential for students being priced out of school in the middle of their educational journey. Some participants encouraged TFAB not to raise non-resident tuition by more than 3%. The perspectives of vulnerable in-state students were also discussed, including the importance of finding more scholarships for juniors and seniors to help with retention rates.

Adjournment. The meeting adjourned at 9:57am.

**Tuition and Fee Advisory Board of the University of Oregon
Meeting Summary | February 1, 2019**

The 2018–2019 Tuition and Fee Advisory Board (TFAB) of the University of Oregon met in the Johnson Hall Conference Room on the UO’s Eugene campus at 8:30am on February 1, 2019. Below is a brief summary of the meeting.

Attending: Jim Brooks, Erica Daley, Zack Demars (guest), Imani Dorsey, Lizzy Elkins (guest), Maria Alejandra Gallegos-Chacón, Emily Halnon (guest), Tova Kruss, Semeredin Kundin (guest), Stuart Laing, Laura Leete, Kevin Marbury (co-chair), Montse Mendez Higuera (guest), Jamie Moffitt (co-chair), JP Monroe, Sarah Nutter, Tan Perkins (guest), Philip Scher, Doneka Scott, Kathy Stanley, Janet Woodruff-Borden

Staff: Debbie Sharp (Office of the VPFA)

Welcome and introductions. Co-chair Jamie Moffitt, vice president of finance and administration and CFO, welcomed the group and invited all participants to introduce themselves.

Undergraduate tuition. Moffitt opened the discussion by acknowledging the difficulty of budget, tuition, and cost cutting discussions, and how all decisions would affect people and their families. She shared a number of factual elements to provide context and information. These included the average gross increase for non-resident tuition at the AAU public institutions (average of 3.5% over the last five years; range of 2.5% to 4.4% per year). The group also discussed the fact that after much discussion, last year’s TFAB assumed \$4.0 million of enrollment growth, but unfortunately, none of this was realized in FY19. She reminded the group that the other unknown factor is state appropriation. The Governor’s Recommended Budget would result in a cut of \$2.7 million to the UO’s E&G fund budget. If the state were to increase investment in the PUSF by \$60 million (50% of the \$120 million being requested in the investment budget), the UO would likely see an increase in its appropriation of a little over \$2 million. The full investment budget would result in an \$8.0 million increase to UO’s E&G fund budget. Moffitt noted that it is possible that TFAB will have more information on where the state budget might realistically land later in the Spring.

The Tuition and Fee Advisory Board spent the rest of the meeting reviewing and discussing a broad range of scenarios to understand how the level at which non-resident tuition is set might affect other factors (e.g., resident tuition, the gap needing to be covered through cost cutting and other revenue streams). Please see the final [TFAB recommendations memo to the president](#) for more information.

Adjournment. The meeting adjourned at 9:57am.

**Tuition and Fee Advisory Board of the University of Oregon
Meeting Summary | March 8, 2019**

The 2018–2019 Tuition and Fee Advisory Board (TFAB) of the University of Oregon met in the Johnson Hall Conference Room on the UO’s Eugene campus at 3:00pm on March 8, 2019. Below is a summary of the meeting.

Attending: Jim Brooks, Erica Daley, Imani Dorsey, Maria Alejandra Gallegos-Chacón, Tova Kruss, Stuart Laing, Laura Leete, Kevin Marbury (co-chair), Aimée Marquez, Jamie Moffitt (co-chair), JP Monroe, Sarah Nutter, Philip Scher, Kathy Stanley, Janelle Stevenson

Staff: Debbie Sharp (Office of the VPFA)

Welcome and introductions. Co-chair Jamie Moffitt, vice president of finance and administration and CFO, welcomed the group and invited all participants to introduce themselves.

Updates. Moffitt updated the TFAB on a number of events that had taken place since the February 1, 2019 meeting. First, she thanked the group for their work on their February [recommendations to President Schill](#). Moffitt noted that the president [invited comment on TFAB's recommendations](#) in person at the February 11th student tuition forum and that his recommendations to the board were later posted online for comment. She also explained that the president accepted the recommendations and only made one minor change in his proposal to the Board: he added 25 cents to the Health Center fee so that students would be billed in whole dollars, reducing the administrative accounts receivable burden of following up with students and families who inadvertently did not pay their entire bill. Moffitt shared that the UO Board of Trustees [approved the proposed tuition rates](#) for nonresident undergraduate and graduate students as well as the proposed mandatory institutional fees.

Moffitt then briefed the TFAB on [updated FY2020 Education and General Fund cost drivers](#), noting that the projections for increased retirement costs had decreased from \$7.6 million to \$7.1 million. She then shared the [FY2019 Q2 short form](#) and the [updated second quarter FY2019 E&G projection](#), which shows a current estimated shortfall of \$7.9 million, up from the \$5.5 million shortfall forecasted in the first quarter. She also discussed President Schill’s March 5th [message to the University of Oregon campus community](#), which noted the need for more state support, the unpredictability of student enrollment, the substantial drop in international enrollment in the past three years, and the need to reduce annual operating costs by up to \$11 million annually. Moffitt noted that the president has been meeting with campus leaders, including the ASUO, leadership from faculty and staff labor unions, senate leadership, the senate budget committee and deans, about ways to handle the budget cuts strategically. She emphasized the president understands that next year’s budget shortfall is too large to be covered by tuition increases alone and that he is trying to move quickly and effectively to address the issue.

Moffitt informed the TFAB that the co-chairs of the joint Committee on Ways & Means had released their recommended budget for the 2019-2021 biennium (see impact summary by [Government & Community Relations](#)). She noted that the co-chair’s budget represents a \$200,000 increase in operating funding for the university, which is an improvement on the \$2.7 million decrease in funding included in the Governor’s Recommended Budget. ASUO student members explained they had been actively lobbying in Salem for increased higher education funding in the investment budget.

Undergraduate tuition. Moffitt noted that the TFAB will be discussing resident, undergraduate tuition rates and needs to make recommendations to the president in May. She shared a revised tuition calculator, including updated cost drivers, new projected shortfall, revised state appropriations, cost cutting figures, estimated student growth, and impact of declining international enrollment.

TFAB members discussed the impact of declining international student numbers—as the graduating international seniors leave the university—and how this may neutralize the positive impact of increased student recruitment. Members also deliberated the possibility of carrying part of the budget gap into the next financial year, the importance of student retention, and how much of the cost cutting will be complete in FY2020. The group considered the fact that Oregon's seven public universities need a collective \$120 million increase in operating funds to keep resident undergraduate tuition increases under 5%. Dean Nutter thanked student members for the work they are doing on behalf of the university, including lobbying in Salem.

Below is a list of a few of the scenarios that TFAB reviewed during the meeting using the tuition calculator tool:

Updated FY2019 E&G Fund Projected Budget Deficit	Updated FY2020 Projected Cost Drivers	Updated FY2020 Change in State Appropriation	Announced Cuts to UO Budget	Incremental Funding – Growth Initiative	Projected Decline in Int'l Students	Resident Tuition Rate Increase	Non-Resident Tuition Rate Increase (approved by Board)	Remaining Gap (to be covered by cost cutting and other revenue)
\$7.9 million	\$23.6 million	\$200,000	\$11 million	\$7.5 million	\$7 million	4.61% (\$10 per credit)	2.97% (\$22 per credit)	\$8.9 million
\$7.9 million	\$23.6 million	\$200,000	\$11 million	\$5 million	\$7 million	19.82% (\$43 per credit)	2.97% (\$22 per credit)	\$62,934
\$7.9 million	\$23.6 million	\$8 million	\$11 million	\$7.5 million	\$7 million	4.61% (\$10 per credit)	2.97% (\$22 per credit)	\$1.1 million

Adjournment. The meeting adjourned at 4:10pm.

Tuition and Fee Advisory Board of the University of Oregon
Meeting Summary | April 19, 2019

The 2018–2019 Tuition and Fee Advisory Board (TFAB) of the University of Oregon met in the Johnson Hall Conference Room on the UO’s Eugene campus at 10:30am on April 19, 2019. Below is a summary of the meeting.

Attending: Odalis Aguilar (guest), Jim Brooks, Erica Daley, Zack Demars (guest), Imani Dorsey, Maria Alejandra Gallegos-Chacón, Bill Harbaugh (guest), Tova Kruss, Stuart Laing, Kevin Marbury (co-chair), Aimée Marquez, Jamie Moffitt (co-chair), JP Monroe, Chris Murray, Sabinna Estephania Pierre (guest), Vanessa Robles (guest), Philip Scher, Kathy Stanley, Janet Woodruff-Borden.

Staff: Debbie Sharp (Office of the VPFA)

Welcome and introductions. Co-chair Jamie Moffitt, vice president of finance and administration and CFO, welcomed the group and invited all participants to introduce themselves. Moffitt explained that in preparation for the May 7th TFAB meeting (5:30–7:30pm, JHCR) which will focus on specific recommendations for resident undergraduate tuition, today’s discussion would focus on a few topics, including more information about the resident student class. She also asked that everyone please try to attend the May 7th meeting as the group will need to develop final recommendations to the president on that date.

Resident class data. Jim Brooks, assistant vice president for student services and enrollment management and director of student financial aid and scholarships, presented data on resident students and the [PathwayOregon program](#).

Brooks shared information on the current undergrad resident population (10,425 students as of fall 2018) and PathwayOregon, which is a [scholarship support program](#) that covers full tuition and fees for resident Oregonians who are academically qualified and Federal Pell Grant eligible. PathwayOregon funds make up the difference between the student’s tuition and fees, and any federal and state aid that they are receiving. Discussing the demographics of PathwayOregon students, Brooks explained that there has been a growth in Latinx recipients (to 24.4%) and some growth in Black or African American recipients (to 4.2%), acknowledging that there is more progress to be made. He noted that 56% of Pathway students are first generation college students, as compared with 19% of non-Pathway UO resident students. Brooks shared some statistics concerning student debt, noting that this is a concern for the university and the TFAB. He explained that of the 387 PathwayOregon students in the 2018 class, 82 of them graduated with no debt. By comparison, 44.1% of resident students and 56.4% of all undergraduates in the 2018 graduating class had no debt. The average debt for resident seniors in 2018 was \$24,076, as compared with the average debt for all graduating seniors, which was \$26,164.

TFAB members asked a number of questions about the PathwayOregon program, graduation data, and student debt. For example, members were particularly concerned about Pell-eligible residents who are not covered by the Pathway program, commenting that they probably carry the highest debt burden compared to other resident students. The group discussed the challenges faced by students who do not qualify for federal or state grants and struggle to pay higher education costs, the lack of funding for low-income transfer and non-Pathway eligible students, and financial issues faced by Pathway students who struggle to pay for housing and books, even though the program pays for tuition and fees.

TFAB members noted that while Pathway students are protected from tuition increases, there are a number of other resident students who will be significantly impacted by large increases in resident tuition and mandatory enrollment fees.

Budget cut updates. Moffitt updated the TFAB on progress with UO budget cuts, confirming that the university plans to cut a total of \$11.6 million recurring from the general fund budget. She explained the president decided to protect some functions at the UO including recent investments in student advisors and counselors, Title IX and public safety functions, and positions such as front line recruiting and fundraising that generate income for the institution. He also instructed the provost and vice presidents to make strategic cuts that minimize the impact on the [university mission](#) while recognizing that any cuts adversely affect people. Moffitt noted that administrative units face larger percentage cuts on average than academic units, and that there will be fewer tenure-track faculty (TTF) hired through the [Institutional Hiring Plan](#) next year. TFAB members discussed how schools and colleges have to manage to their budgets and noted that deferred maintenance money from the state does not begin to cover the university's infrastructural maintenance needs.

Sensitivity Analysis. Moffitt presented a sensitivity analysis that looked at various potential outcomes related to (1) legislative funding in the PUSF, and (2) potential projected enrollment. For each scenario, the analysis provided information on two key questions:

- (1) If resident tuition were kept under 5%, how much of a budget gap would remain after the institution implements the announced \$11.6 million of recurring budget cuts?
- (2) If after the \$11.6 million of budget cuts were implemented the institution were to balance the FY2020 budget by increasing resident, undergraduate tuition to fill the remaining budget gap, what tuition rate increase would be necessary?

The analysis looked at PUSF (Public University Support Funding) funding scenarios that ranged from +\$40.5 million to +\$120 million and projected enrollment that ranged from 90% to 100% of non-resident growth targets. It's important to note that this analysis was based on the existing \$7.9 million FY2019 budget gap (Q2 estimate) and the assumption that the President's announced \$11.6 million of budget cuts are fully implemented.

TFAB members discussed university tolerance for maintaining a budget gap, other universities' enrollment experiences, and positive indications for student enrollment at the UO in the coming year. The group noted that deposit information should be available before the May 7 meeting, which should help inform TFAB's recommendation to the president about resident undergraduate tuition.

Adjournment. The meeting adjourned at 11:33am.

Appendix 6 - Summary of HB 4141 Requirements for Documents Submitted to the President by the Tuition and Fee Advisory Board (TFAB)

HB4141 requires the advisory body provide	Location of documentation
A written report to the president of the university that sets forth the recommendations, deliberations and observations of the advisory body regarding resident tuition and mandatory enrollment fees for the upcoming academic year. The report must include the following:	<ul style="list-style-type: none">• May 2019 memo (resident undergraduate tuition) submitted to President Schill on May 10, 2019.• February 2019 memo (non-resident and graduate tuition and fees) submitted to President Schill on February 6, 2019 (see Appendix 1).
<ul style="list-style-type: none">• Any minority report requested by a member of the advisory body	<ul style="list-style-type: none">• Submitted to President Schill on May 10, 2019.
<ul style="list-style-type: none">• A plan for how the governing board and the public university's administration are managing costs on an ongoing basis.	<ul style="list-style-type: none">• Discussed during November 16, 2018 TFAB meeting. Available at https://ir.uoregon.edu/files/Cost_Management_Plan_11-16-18.pdf and in Appendix 6a.
<ul style="list-style-type: none">• A plan for how resident tuition and mandatory enrollment fees could be decreased if the public university receives more moneys from the state than anticipated.	<ul style="list-style-type: none">• Discussed during May 7, 2019 TFAB meeting. Outlined on page four of the May 10, 2019 memo to President Schill.
<ul style="list-style-type: none">• Documented consideration of the impact of resident tuition and mandatory enrollment fees that the advisory body intends to recommend to the president on:<ul style="list-style-type: none">○ Students at the public university, with an emphasis on historically underserved students, as defined by the public university.	<ul style="list-style-type: none">• Discussed during the following TFAB meetings: (see Appendix 5)<ul style="list-style-type: none">○ January 18, 2019 TFAB tuition forum: feedback from TFAB student forum about impact of tuition increases on students○ January 23, 2019: impact of online course fees and positive impacts of online courses on students, particularly non-traditional students.○ January 30, 2019: perspectives of students being priced out of higher education, vulnerable in-state students, etc.○ April 29, 2019: discussion of resident student demographics, challenges faced by low-income transfer and non-PathwayOregon-eligible students, non-tuition/fee financial pressures on Pathway Oregon students, etc.
<ul style="list-style-type: none">○ The mission of the public university, as described by the mission statement adopted under ORS 352.089.	<ul style="list-style-type: none">• Discussed during TFAB meetings on January 30, 2019 and April 19, 2019. Meeting summaries available in Appendix 5.
<ul style="list-style-type: none">○ Alternative scenarios that involve smaller increases in resident tuition and mandatory enrollment fees than the advisory body intends to recommend to the president of the public university.	<ul style="list-style-type: none">• Discussed during May 7, 2019 TFAB meeting and outlined on page four of the May 10, 2019 memo to President Schill.

Appendix 6a - Plan for How the Governing Board and Administration are Managing Costs

Language for Section 4(a) of HB 4141-B

Enrolled House Bill 4141-B (2018) establishes certain requirements for the process that must be used by Oregon's public universities in setting undergraduate, resident tuition. Section 4(a) stipulates that the UO must provide the Tuition and Fee Advisory Board (TFAB) with a "plan for how the governing board and the public university's administration are managing costs on an ongoing basis".

Managing both short- and long-term costs is an enduring concern of the university's administration and governing board. The Board of Trustees, along with university leadership, accepts full responsibility for the management of costs of the University, recognizing that this is a fundamental duty of the governing board. University leadership believes it is an obligation to appropriately and responsibly manage costs, particularly since so much of the institution's education and general budget comes from tuition or taxpayer dollars.

To help ensure cost management happens on an "ongoing basis" as required by both the law and sound fiscal management,

1. The Board of Trustees annually reviews projected expenditures for the upcoming fiscal year. This helps ensure expenditures align with institutional priorities, as well as projected revenue.
2. The Board of Trustees reviews, quarterly, financial projections against actual spending rates. This helps ensure costs are in line with approved budgets, that treasury and financial decisions are rooted in data, and that any irregularities are quickly caught and analyzed.
3. The Board of Trustees receives benchmarking information, comparing the UO's staffing levels (which account for approximately 80% of the education and general budget) to those of public peer institutions. This information helps UO Leadership to better understand how UO staffing compares to peers and how comparative staffing levels affect our labor costs.
4. The Board of Trustees will annually discuss measures taken by the institution toward specific savings initiatives. Administration leadership will provide updates on cost-saving endeavors that will realize one-time savings, recurring savings, or a combination of both.
5. The Board of Trustees and University leadership regularly discuss and review all university costs, including state mandated costs such as PERS and PEBB, and supports efforts, including those in coordination with the other universities, to address such costs.