



Southern Oregon University

Public Meeting Notice

February 23, 2015

TO: Board of Trustees of Southern Oregon University
FROM: Liz Shelby, SOU Chief of Staff
RE: **Notice of Finance Committee Meetings**

The Southern Oregon University Board of Trustees Finance Committee will hold two Finance Committee meetings in March as follows:

Monday, March 2nd, 2015

4:00pm to 6:00pm (or until business is concluded)

Hannon Library, DeBoer Boardroom, 3rd Floor, Room #303

Information meeting to learn and understand the budgeting process, the tuition setting process, and how Enrollment projections are made.

Tuesday, March 17, 2015

4:00pm to 6:00pm (or until business is concluded)

Hannon Library, DeBoer Boardroom, 3rd Floor, Room #303

Review the Administration's tuition and fee proposal process in preparation for the full board meeting.

The Hannon Library is located at 1290 Ashland Street, on the campus of Southern Oregon University. **If special accommodations are required, please contact Jennifer Athanas at (541) 552-6111 at least 72 hours in advance.**

Board of Trustees

1250 Siskiyou Boulevard, Ashland, OR 97520 T (541) 552-6111 sou.edu/governance

**Southern Oregon University Board of Trustees
Finance & Administration Committee
Monday, March 2, 2015
DeBoer Boardroom, Hannon Library, 3rd Floor, #303
4:00pm – 6:00pm (or until business is concluded)**

Agenda

Call to Order – Paul Nicholson, Chair 4:00PM

Roll Call

Welcome & Introductions - Paul Nicholson, Chair

- 1. Overview of Today’s Agenda 4:05PM
Craig Morris, VP for Finance and Administration**
- 2. Budget Process & Timeline 4:10PM
Mark Denney, AVP for Budget and Planning**
- 3. Periodic Management Report 4:30PM
Steve Larvick, Director of Business Services**
- 4. Enrollment Report 4:45PM
Chris Stanek, Director of Institutional Research**
- 5. Process for Determining Tuition for 2015-2016 5:15PM
Mark Denney, AVP for Budget and Planning**
- 6. Outcomes Funding Model Update 5:30PM
Craig Morris, VP for Finance and Administration**

Adjourn



Periodic Management Report

As of January 31, 2015
Fiscal Year Ended June 30, 2015

Budget Forecast

(in thousands except enrollment)	FY2014 Final Results	FY2015 Initial Budget	% Change	FY2015 Forecast Budget	Variance from Initial Budget	% Variance from Initial Budget	Notes
EDUCATION & GENERAL							
State General Fund	\$ 13,762	\$ 16,779	22%	\$ 16,986	\$ 207	1%	(1)
Tuition & Resource Fees, net of Remissions	33,278	31,974	-4%	33,108	1,134	4%	(2)
Other	3,008	2,101	-30%	2,051	(50)	-2%	
Total Revenues	\$ 50,048	\$ 50,854	2%	\$ 52,145	\$ 1,291	3%	
Personnel Services	\$ 43,948	\$ 43,794	0%	\$ 42,886	\$ (908)	-2%	(3)
Supplies & Services & Capital Outlay	7,229	7,231	0%	8,276	1,045	14%	(4)
Total Expenditures	\$ 51,177	\$ 51,025	0%	\$ 51,162	\$ 137	0%	
Net from Operations	\$ (1,129)	\$ (171)		\$ 983	\$ 1,154		
Net Transfers	1,855	2,530	36%	1,593	(937)	-37%	(5)
Fund Additions/(Deductions)	0	0		0	0		
Change in Fund Balance	\$ 726	\$ 2,359		\$ 2,576	\$ 217		
Beginning Fund Balance	1,018	1,744		1,744	0		
Ending Fund Balance	\$ 1,744	\$ 4,103		\$ 4,320	\$ 217		
Ending FB as a % Operating Revenues	3.5%	8.1%		8.3%			
Student FTE Enrollment	4,421	4,306	-3%	4,386		2%	
AUXILIARY ENTERPRISES							
Enrollment Fees	\$ 5,125	\$ 5,521	8%	\$ 5,427	\$ (94)	-2%	
Sales & Services	12,725	11,483	-10%	11,124	(359)	-3%	(6)
Other	1,466	1,725	18%	1,664	(61)	-4%	
Total Revenues	\$ 19,316	\$ 18,729	-3%	\$ 18,215	\$ (514)	-3%	
Personnel Services	\$ 6,453	\$ 6,533	1%	\$ 6,399	\$ (134)	-2%	(7)
Supplies & Services & Capital Outlay	11,642	10,981	-6%	10,850	(131)	-1%	(8)
Total Expenditures	\$ 18,095	\$ 17,514	-3%	\$ 17,249	\$ (265)	-2%	
Net from Operations	\$ 1,221	\$ 1,215		\$ 966	\$ (249)		
Net Transfers	\$ (746)	\$ (3,135)	320%	\$ (1,938)	\$ 1,197	-38%	(5)
Additions/(Deductions) to Unrestricted Net Assets	227	(702)		(742)	(40)		
Change in Unrestricted Net Assets	\$ 702	\$ (2,622)		\$ (1,714)	\$ 908		
Beginning Fund Balance Available for Operations	3,109	3,811		3,811	0		
Ending Fund Balance Available for Operations	\$ 3,811	\$ 1,189		\$ 2,097	\$ 908		
Ending FB as a % Operating Revenues	19.7%	6.3%		11.5%			



Periodic Management Report

As of January 31, 2015
Fiscal Year Ended June 30, 2015

Budget Forecast

(in thousands except enrollment)	FY2014 Final Results	FY2015 Initial Budget	% Change	FY2015 Forecast Budget	Variance from Initial Budget	% Variance from Initial Budget	Notes
DESIGNATED OPERATIONS, SERVICE DEPARTMENTS, CLEARING FUNDS							
Enrollment Fees	\$ 721	\$ 1,078	50%	\$ 932	\$ (146)	-14%	(9)
Sales & Services	1,669	1,870	12%	1,965	95	5%	(10)
Other	1,534	1,847	20%	1,895	48	3%	
Total Revenues	<u>\$ 3,924</u>	<u>\$ 4,795</u>	22%	<u>\$ 4,792</u>	<u>\$ (3)</u>	0%	
Personnel Services	\$ 2,355	\$ 2,888	23%	\$ 2,751	\$ (137)	-5%	(11)
Supplies & Services & Capital Outlay	1,875	1,998	7%	2,362	364	18%	(12)
Total Expenditures	<u>\$ 4,230</u>	<u>\$ 4,886</u>	16%	<u>\$ 5,113</u>	<u>\$ 227</u>	5%	
Net from Operations	<u>\$ (306)</u>	<u>\$ (91)</u>		<u>\$ (321)</u>	<u>\$ (230)</u>		
Net Transfers	(115)	152	-232%	315	163	107%	(11)
Additions/(Deductions) to Unrestricted Net Assets	75	0		30	30		
Change in Unrestricted Net Assets	\$ (346)	\$ 61		\$ 24	\$ (37)		
Beginning Fund Balance Available for Operations	<u>872</u>	<u>526</u>		<u>526</u>	<u>0</u>		
Ending Fund Balance Available for Operations	<u>\$ 526</u>	<u>\$ 587</u>		<u>\$ 550</u>	<u>\$ (37)</u>		
Ending FB as a % Operating Revenues		12.2%		11.5%			
ALL CURRENT UNRESTRICTED FUNDS:							
Beginning Fund Balance Available for Daily Operations	\$ 4,999	\$ 6,081		\$ 6,081	\$ -		
Revenues	73,288	74,378	1%	75,152	774	1%	
Expenditures	73,502	73,425	0%	73,524	99	0%	
Transfers	994	(453)		(30)	423		
GL Additions & Deductions	<u>302</u>	<u>(702)</u>		<u>(712)</u>	<u>(10)</u>		
Ending Fund Balance Available for Daily Operations	<u>\$ 6,081</u>	<u>\$ 5,879</u>		<u>\$ 6,967</u>	<u>\$ 1,088</u>		
Ending FB as a % Operating Revenues	8.3%	7.9%		9.3%			

Notes

- (1) Difference in State funding as compared to last year, is tied to the tuition buy down plus the added costs associated with the University Shared Services Enterprise.
- (2) Initial budget anticipated a revenue decrease of about 2.6%. Actual student FTE is trending flat to last year, actual dollars are also up due to shifts in enrollment mix.
- (3) Savings partially from the restructuring of Academic Affairs, and less reliance on the use of adjunct instructors.
- (4) Projected increased utilities and legal costs.
- (5) Reduction in timing of the amount to be transferred from the North Campus Village Project (\$400k), and reduction of the transfer to come from other Housing operations (\$500k).
- (6) Lower than anticipated Day Care Center revenue, lower Housing revenues due to lower than budgeted occupancy, and increased Residence Hall fee remissions.
- (7) Savings in labor costs largely in Housing operations.
- (8) Savings also largely in Housing operations.
- (9) Growth primarily in Non-credit programs, but not to the levels initially budgeted.
- (10) Growth in support coming in from the JPR Foundation.
- (11) Growth in Non-credit programs, plus change in accounting for JPR General Fund support.
- (12) Growth in support coming in from the JPR Foundation.



Southern Oregon University Finance Committee
March 2, 2015

OVERVIEW OF FINANCIAL OPERATIONS AND BUDGETING



Financial Operations

Budgeted Operations

The primary operations for which the university exists. For SOU these are the Academic Instructional programs, Academic Support programs, and Administration and Finance. Includes the General Fund.

Designated Operations

These operations either support the primary academic mission of SOU or are complimentary to that mission. They are self supporting, meaning they generate revenue to cover all direct expenditures.

Auxiliary Operations

Operations performed outside of the primary role of the mission of the University, but in support of that primary role or mission. Examples include Student Activities, Intercollegiate Athletics, Housing/Dining, and Campus Parking.

Gift/Agency/Other Operations

Restricted funds existing for a specific purpose which cannot be used for any other purpose other than those expressly intended. Examples are Agency funds held by the University but belonging to an external entity, grants, or restricted gift funds.



Primary Sources of Funds

Tuition and Fees

- 63% of FY15 budgeted operations revenue
- Drivers: Tuition rates, enrollment, student mix (resident vs. non-resident)
- Specific review and approval process

State Appropriations

- 33% of FY15 budgeted operations revenue
- Drivers: State budget, enrollment by funded student category, student outcomes
- State budgeting/allocation process

Other Revenue

- 4% of FY15 budgeted operations revenue
- Drivers: Varies by type of revenue: Cost recovery, gifts, sales, misc. fees, internal sales, other



Budget Process

Focus on FY15 current process and timelines

July – January: Planning

January – February: Development

March: Review and approve Proposed Tuition and Fees for FY16

- Published in OUS Fee Book final time for FY16 – deadline: April 10

April: Review and approve Auxiliary Budgets

- Student Activities
- Intercollegiate Athletics
- Housing
- Student Health and Wellness Center
- Parking

May: Review and approve revenue projections

June: Review and approve expenditure projections, budget roll up

Questions?



Mandatory Fee Comparison 2010-11 through 2014-15

	2010-11	2011-12	2012-13	2013-14	2014-15
Southern Oregon University	\$ 400	\$ 524	\$ 446	\$ 465	\$ 471
Eastern Oregon University	\$ 453	\$ 475	\$ 440	\$ 442	\$ 473
Western Oregon University	\$ 303	\$ 436	\$ 483	\$ 503	\$ 534
Oregon Institute of Technology	\$ 368	\$ 436	\$ 490	\$ 490	\$ 495
Oregon State University	\$ 410	\$ 484	\$ 492	\$ 482	\$ 491
Portland State University	\$ 389	\$ 484	\$ 421	\$ 424	\$ 423
University of Oregon	\$ 408	\$ 407	\$ 433	\$ 494	\$ 576

Southern Oregon University

Building Fee	\$ 33	\$ 39	\$ 45	\$ 45	\$ 45
Incidental F	202	307	263	301	307
Health Fee	165	178	138	119	119
Recreation	-	-	-	-	-
Technology	-	-	-	-	-
Student Un	-	-	-	-	-
Total Fees	\$ 400	\$ 524	\$ 446	\$ 465	\$ 471

Eastern Oregon University

Building Fee	\$ 33	\$ 39	\$ 45	\$ 45	\$ 45
Incidental F	240	245	245	247	250
Health Fee	180	191	150	150	150
Recreation	-	-	-	-	28
Technology	-	-	-	-	-
Student Un	-	-	-	-	-
Total Fees	\$ 453	\$ 475	\$ 440	\$ 442	\$ 473

Western Oregon University

Building Fee	\$ 33	\$ 39	\$ 45	\$ 45	\$ 45
Incidental F	110	219	301	306	322
Health Fee	160	178	95	110	125
Recreation	-	-	42	42	42
Technology	-	-	-	-	-
Student Un	-	-	-	-	-
Total Fees	\$ 303	\$ 436	\$ 483	\$ 503	\$ 534

Oregon Institute of Technology

Building Fee	\$ 33	\$ 39	\$ 45	\$ 45	\$ 45
Incidental F	152	195	295	295	300
Health Fee	183	202	150	150	150
Recreation	-	-	-	-	-
Technology	-	-	-	-	-
Student Un	-	-	-	-	-
Total Fees	\$ 368	\$ 436	\$ 490	\$ 490	\$ 495

Oregon State University

Building Fee	\$ 33	\$ 39	\$ 45	\$ 45	\$ 45
Incidental F	242	310	323	313	320
Health Fee	135	136	124	124	125
Recreation	-	-	-	-	-
Technology	-	-	-	-	-
Student Un	-	-	-	-	-
Total Fees	\$ 410	\$ 484	\$ 492	\$ 482	\$ 491

University of Oregon

Building Fee	\$ 33	\$ 39	\$ 45	\$ 45	\$ 45
Incidental F	191	178	192	208	215
Health Fee	141	145	150	154	155
Recreation	43	45	46	87	94
Technology	-	-	-	-	-
Student Un	-	-	-	-	67
Total Fees	\$ 408	\$ 407	\$ 433	\$ 494	\$ 576

Portland State University

Building Fee	\$ 33	\$ 39	\$ 45	\$ 45	\$ 45
Incidental F	125	174	216	219	218
Health Fee	190	230	119	119	119
Recreation	41	41	41	41	41
Technology	-	-	-	-	-
Student Un	-	-	-	-	-
Total Fees	\$ 389	\$ 484	\$ 421	\$ 424	\$ 423

PRELIMINARY Funding Level Comparisons - Updated with 1/14/15 Co-Chairs' Budget Framework

Appropriation Category (General Fund and Lottery Funds)	2007-09		2013-15		2015-17 Proposals			Public University Presidents - Consensus Funding Level
	Original Appropriation (SB 5515)	Legislatively Approved Budget (LAB) as of April 2014 *	HECC Agency Request Budget (ARB)	Governor's Recommended Budget (GRB)	CO-CHAIRS' ESTIMATED AMOUNTS			
					Changes from GRB	Co-Chairs' Budget Framework	Public University Presidents - Consensus Funding Level	
Public University Support Fund (PUSF)	\$ 646,608,631	\$ 480,545,512	\$ 532,244,762	\$ 527,202,630			\$ 650,255,918	
2013-15 Tuition Buy Down and Continuation (a)	-	40,000,000	61,755,238	61,755,238			61,755,238	
Total Public University Support Fund	646,608,631	520,545,512	594,000,000	588,957,868	46,042,132 (1)	635,000,000 (2)	712,011,156	
State Programs	8,460,165	11,280,651	10,596,516	10,597,135	-	10,597,135 (3)	13,000,000	
ETIC	37,280,000	14,225,106	24,451,274	24,451,274	-	24,451,274 (b)	29,988,844 (b)	
"Education & General" Subtotal	692,348,796	546,051,269	629,047,790	624,006,277	46,042,132	670,048,409 (c)	755,000,000 (c)	
Statewide Public Services	110,208,278	101,155,580	104,493,713	104,493,713	-	104,493,713 (4)	125,000,000	
Sports Lottery (d)	12,683,423	8,000,000	11,397,647	-	8,000,000	8,000,000 (5)	11,397,647	
Debt Service (General Fund and Lottery)	52,678,582	114,736,795	162,033,060	161,369,516	-	161,369,516 (6)	162,033,060	
Grand Total	\$ 867,919,079	\$ 769,943,644	\$ 906,972,210	\$ 889,869,506	\$ 54,042,132	\$ 943,911,638	\$ 1,053,430,707	

* 2013-15 LAB does not include subsequent one-time appropriations received through May and September Emergency Board actions
(a) Tuition Buy Downs were implemented in phases in 2013-15; continuation in 2015-17 is at full biennial amount
(b) Amount in consensus funding considered to be ETIC related is calculated as original ETIC appropriation for 2013-15 plus general inflation factor of 3.3%.
(c) Funding level referenced in Joint universities presidents' letter to HECC
(d) In addition to total cap of \$8M for 2013-15, OSU and UO were limited to \$1M each for the biennium; The HECC ARB and President Consensus funding levels restored Sports Lottery to the statutory 1% of lottery revenues but the GRB eliminated Sports Lottery and transferred funding to the Oregon Opportunity Grant
(e) Inflation adjusted to 2008 using the Higher Education Price Index (HEPI)

Co-Chairs' Budget Framework Notes:
1) Some portion, amount not identified or available, of the increase to the Public University Support Fund represents "funding required to pay the costs of Shared Services."
2) Amount for PUSF is explicitly stated, although rounded to millions; if additional resources become available, an additional \$15M for the PUSF is one of the co-chairs' priority enhancements.
3) State Programs amount is not explicitly stated, but assumed to be a GRB level because the framework "maintains current program levels."
4) Statewide Public Services amount is not explicitly stated, but assumed to be a GRB level because the framework "maintains current program levels."
5) Sports Lottery amount is not explicitly stated, but assumed to be at 2013-15 levels (with caps for OSU and UO continued) because the framework "continues... the funding, adjusted in a similar manner as in our current budget, to sustain athletics programs at each of our universities."
6) The framework includes resources "to meet anticipated debt service needs for state-issued debt for projects at ... Public Universities."

HECC 10-Year "Stair Step" to 40-40-20: Under Development



Revenue and Expenditure Development Processes

For Budget Development



Revenue Process - Enrollment

- Enrollment Projections
 - Managed by Departments of Institutional Research and Enrollment and Retention
 - Currently aligned with Retrenchment Plan
 - Historical trends



Revenue Process – Tuition Rates

- Tuition Advisory Committee
 - Make up: Students, faculty, administration
 - Review possible options, make recommendation to Budget Committee
- Budget Committee
 - Receives recommendation
 - Gets input from other University stakeholders: UPB & students
 - Approves rates
- Fee Book



Revenue Process – Mandatory Fees

Student Incidental Fee

Student Fee process

Recreation Center Fee

Student Fee process

Health Fee

Presented by Director, Student Health and Wellness Center

Budget Committee process

Room and Board Rates

Presented by Director, Housing

Budget Committee process

Building Fee

Set in statute



Revenue Process – State Appropriations

- Funding by campus determined by Higher Education Coordinating Commission
- Allocation currently based on enrollment



Revenue Process – Other Revenue

- Historical trends
- Known changes
- Reminder of components of Other Revenue:
 - Cost recovery (grants, financial aid, Veterans Admin, etc.) 14%
 - Interest income 40%
 - External sales (vending machine, postage, etc.) 2%
 - Misc. fines/fees (library fines, transcript fees, event ticket sales) 13%
 - Rental/leases (facilities use) 5%
 - Misc. other (includes internal sales) 26%



Expenditure Process - Labor

- Position Control
 - Only approved positions are budgeted
 - All approved positions are budgeted at 100%
- Benefits
 - Budgeted based on known rates at budget development
- Pooled Labor
 - Students, part time, etc.
 - Determined by budget assumptions and budget initiatives



Expenditure Process – Supplies and Services

- Budget Assumptions
 - Discretionary Spending
 - Guidance outlines in the budget assumptions
 - Examples: Admin/instructional supplies, travel
 - Non-Discretionary
 - Based on known rate changes and anticipated consumption
 - Examples: Utilities, debt service

Questions?

**Student Headcounts by Funnel Category
Fall 2010 Through Fall 2014**

Applications

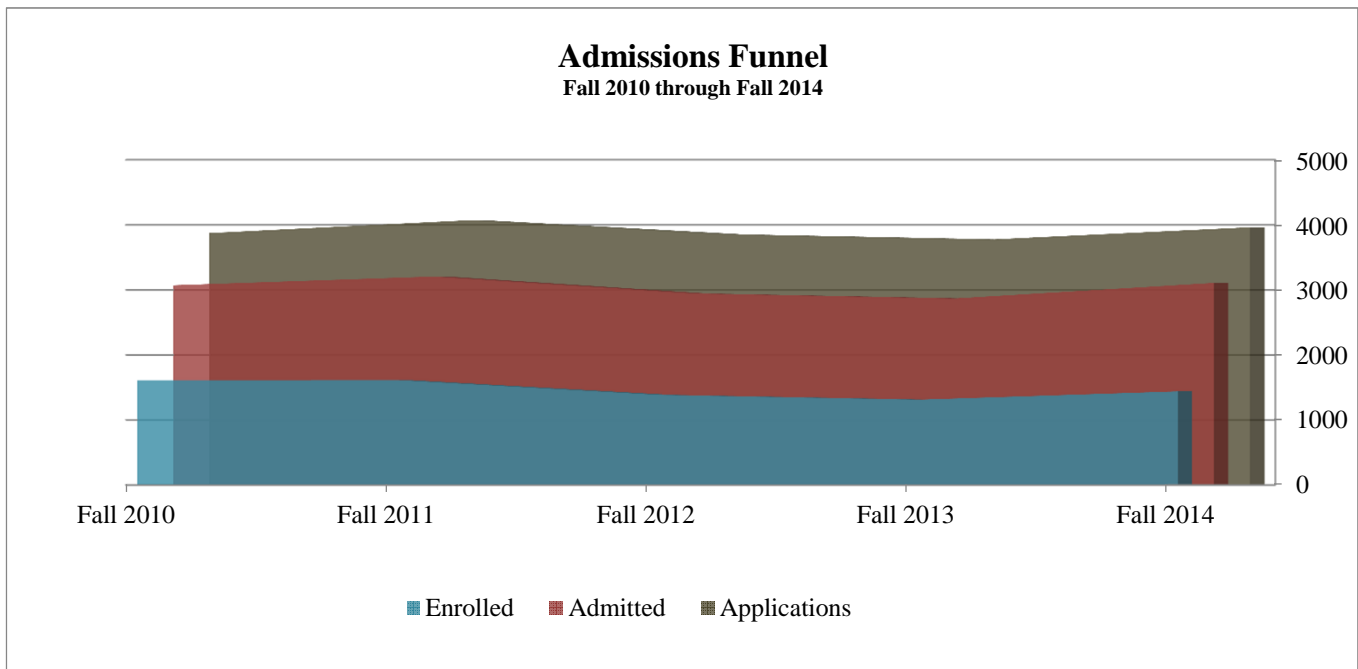
	Fall 2010	Fall 2011	Fall 2012	Fall 2013	Fall 2014
Freshmen - Resident	1,166	1,207	1,124	1,047	1,106
Freshmen - Nonresident	1,334	1,425	1,414	1,417	1,625
Transfer - Resident	570	620	500	472	502
Transfer - Nonresident	464	481	493	511	446
Postbacs/Grads	341	340	323	329	285
Total	3,875	4,073	3,854	3,776	3,964

Admitted

	Fall 2010	Fall 2011	Fall 2012	Fall 2013	Fall 2014
Freshmen - Resident	933	985	918	836	884
Freshmen - Nonresident	1,031	1,064	1,027	1,034	1,229
Transfer - Resident	490	550	436	408	444
Transfer - Nonresident	363	388	366	388	350
Postbacs/Grads	255	219	198	202	201
Total	3,072	3,206	2,945	2,868	3,108

Enrolled

	Fall 2010	Fall 2011	Fall 2012	Fall 2013	Fall 2014
Freshmen - Resident	500	507	436	401	367
Freshmen - Nonresident	290	279	273	247	348
Transfer - Resident	365	428	330	305	344
Transfer - Nonresident	250	236	204	219	223
Postbacs/Grads	205	162	142	138	157
Total	1,610	1,612	1,385	1,310	1,439



Headcounts within the funnel categories above are unduplicated meaning if a prospective student has applied multiple times for the Fall term they are only counted once.

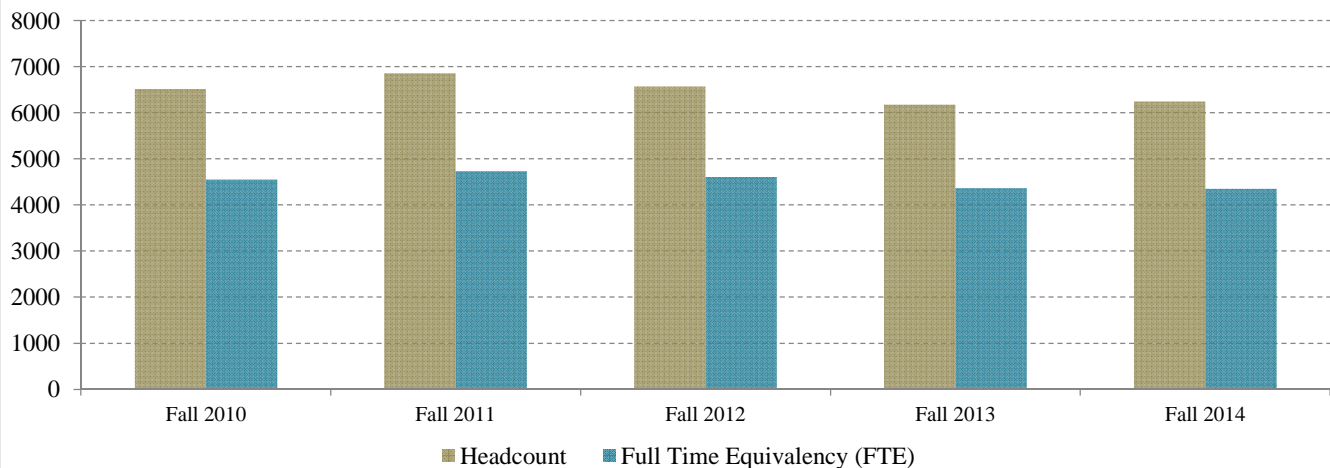
Headcounts within the admitted category are a subset of the applications, meaning that the individual has to apply before being admitted. Likewise the headcounts in the enrolled category is a subset of the admitted students meaning that the individual has to be admitted before they can be counted as enrolled.

There is an additional category of "non-admitted" students that are allowed to attend only part-time without going through the formal admissions application process. Those headcounts are not included above.

**Student Headcounts by Demographics
Fall 2010 Through Fall 2014**

	Fall 2010	Fall 2011	Fall 2012	Fall 2013	Fall 2014
New Freshmen	792	786	708	648	713
New Transfers	604	663	532	523	567
New PostBacs/Graduates	202	162	141	138	156
Subtotal - New Students	1,598	1,611	1,381	1,309	1,436
Students Continuing	3,340	3,617	3,654	3,515	3,310
Students Returning After Absense	80	51	48	46	118
Non-Admitted Students	1,497	1,580	1,490	1,307	1,381
Grand Total - Headcount	6,515	6,859	6,573	6,177	6,245
Grand Total - FTE	4,551	4,729	4,607	4,362	4,353
Resident	4,989	5,203	4,908	4,493	4,460
Non-Resident	1,526	1,656	1,665	1,684	1,785
International	117	139	135	157	155
American Indian/Alaskan Native	105	92	83	74	63
Asian	178	136	119	95	99
African American	111	110	105	107	115
Hispanic	351	435	439	467	485
Pacific Islander	44	34	27	18	23
Multiple				288	360
White	4,163	4,045	3,758	3,397	3,279
Unknown/Other	1,563	2,007	2,042	1,574	1,666
Alaska	108	92	104	94	75
California	809	936	971	954	1,019
Hawaii	132	117	101	87	104
Idaho	28	40	33	24	27
Washington	158	144	148	152	162
All Other States	210	206	210	249	266

**Headcount & Full Time Equivalency (FTE)
Fall 2010 through Fall 2014**



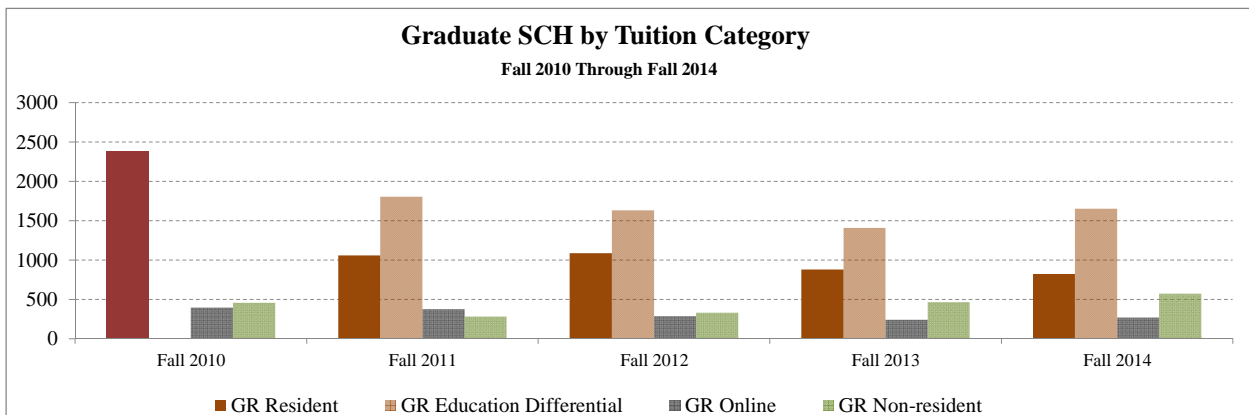
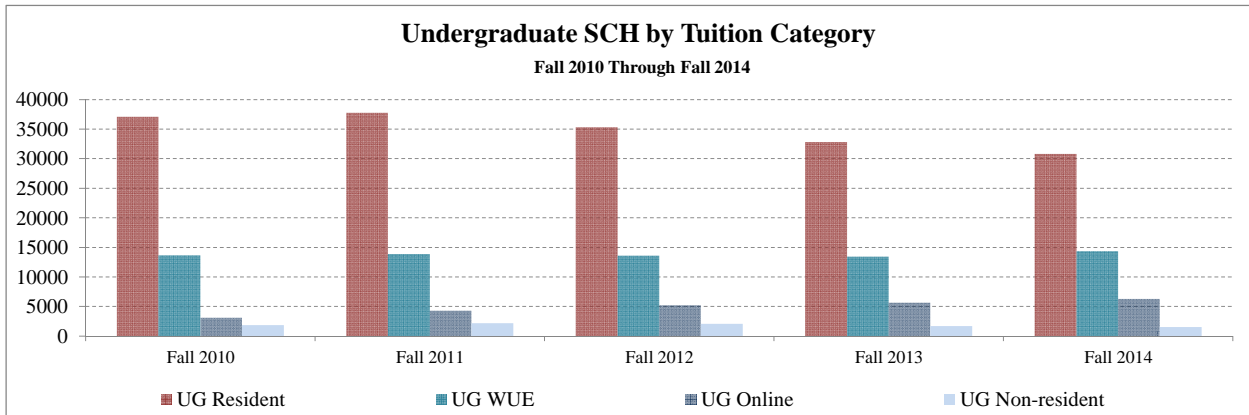
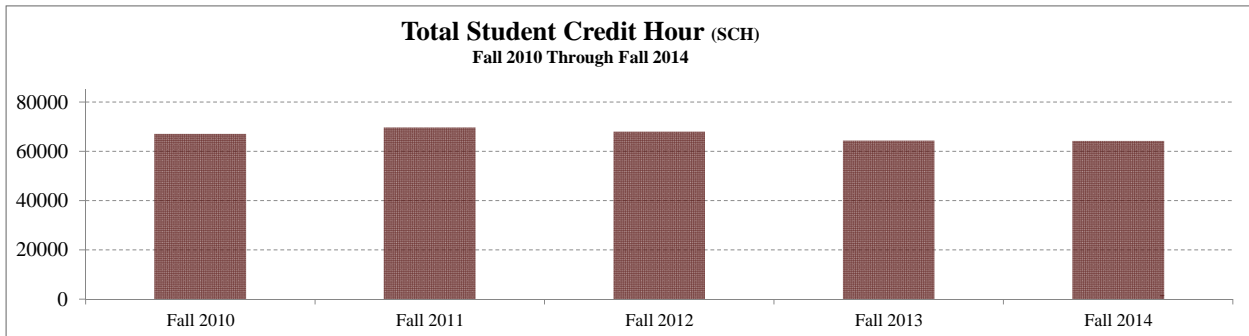
An FTE or full time equivalency is a calculated value that describes the number of students enrolled in classes if every student was taking enough credits to keep them on track for a timely completion of their degree program.

Undergraduate FTE is calculated by adding all UG students' credit hours within the term and dividing by 15 representing 4 years needed to finish a bachelor's degree program. Graduate FTE is calculated by adding all GR students' credit hours within the term and dividing by 12 representing the 3-4 quarters needed to finish a master's degree program.

Enrolled FTE should not be confused with a students' full-time vs. part-time status. Generally a full-time undergraduate is one taking 12 or more hours per term and a full-time graduate is one taking 9 or more hours per term. This full-time vs. part-time status is most commonly used for financial aid awarding and athletic eligibility rules.

**Student Credit Hours by Tuition Category
Fall 2010 Through Fall 2014**

	Fall 2010	Fall 2011	Fall 2012	Fall 2013	Fall 2014
UG WUE	13,636	13,855	13,614	13,457	14,381
UG Resident	37,088	37,782	35,312	32,789	30,818
UG Non-resident	1,829	2,176	2,085	1,673	1,538
UG Online	3,109	4,315	5,209	5,656	6,315
Subtotal - Undergraduates	55,663	58,128	56,220	53,575	53,052
GR Resident	2,379	1,058	1,087	877	823
GR Non-resident	454	280	328	464	575
GR Online	396	373	285	238	270
GR Education Differential		1,807	1,629	1,407	1,651
Subtotal - Graduates	3,228	3,518	3,329	2,986	3,319
Staff Rates (incl EdDept Co-Pays)	737	721	627	618	800
Waived Tuition	647	722	644	800	781
Course Based Tuition	1,097	851	609	826	709
Advanced Southern Credit	5,473	5,693	6,477	5,556	5,590
Early Entry HS	191	48	79	41	26
Grand Total - SCH	67,037	69,681	67,985	64,402	64,277



An SCH or student credit hour is the base unit for student enrollment and defines the number of hours a student is registered for in their courses. If a student is taking three 4 credit classes that will equate to 12 SCH (3*4=12). Students pay tuition based on the number of SCH in which they enroll.

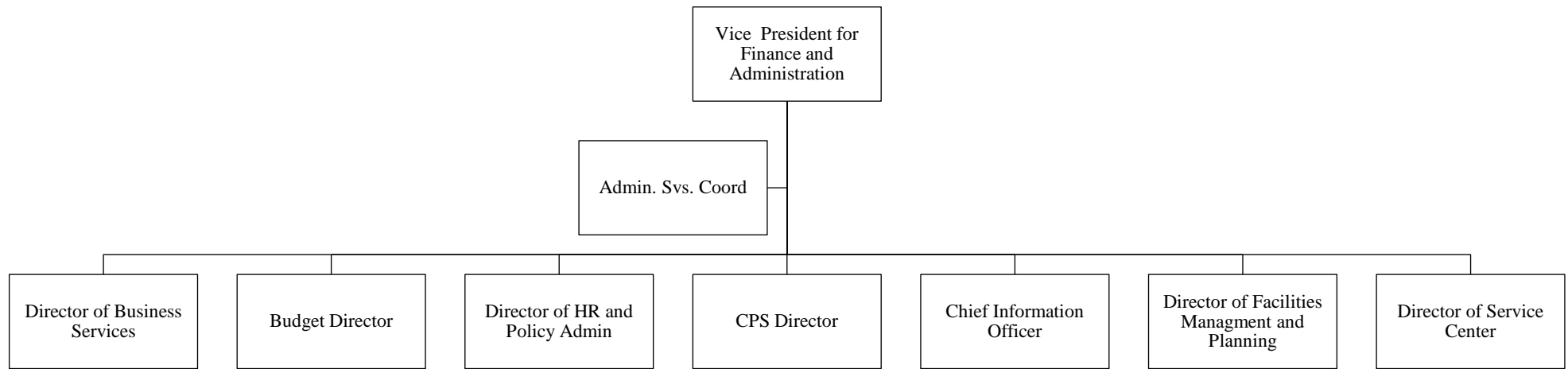


Tuition Comparison 2010-11 through 2014-15

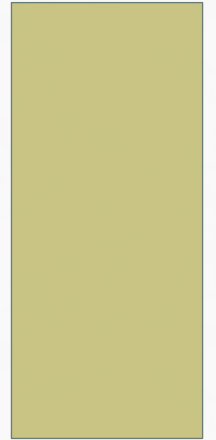
<u>Southern Oregon University Tuition Rates</u>	2010-11		2011-12		2012-13		2013-14		Tuition Buy Back	
				% Change		% Change		% Change	2014-15	% Change
Resident Undergraduate	\$ 117.00	\$ 125.00		6.84%	\$ 137.40	9.92%	\$ 142.20	3.49%	\$ 140.15	-1.44%
Non-Resident Undergraduate	\$ 420.00	\$ 420.00		0.00%	\$ 420.00	0.00%	\$ 441.84	5.20%	\$ 441.84	0.00%
Undergraduate Online	\$ 182.00	\$ 190.00		4.40%	\$ 202.40	6.53%	\$ 209.54	3.53%	\$ 209.54	0.00%
Western Undergraduate Exchange	\$ 175.50	\$ 187.50		6.84%	\$ 206.10	9.92%	\$ 213.30	3.49%	\$ 210.23	-1.44%
Resident Graduate	350, with slide	\$ 350.00			\$ 360.00	2.86%	\$ 378.72	5.20%	\$ 378.72	0.00%
Non-Resident Graduate	350, with slide	\$ 450.00			\$ 450.00	0.00%	\$ 473.40	5.20%	\$ 473.40	0.00%
Graduate Online	Resident + \$65	\$ 415.00			\$ 425.00	2.41%	\$ 443.72	4.40%	\$ 443.72	0.00%
<u>SOU comparison * to other Oregon Public Universities</u>										
<i>* Resident Undergraduate only</i>										
Eastern Oregon University	\$ 118.00	\$ 124.50		5.51%	\$ 131.50	5.62%	\$ 136.00	3.42%	\$ 134.00	-1.47% Note 2
Southern Oregon University	\$ 117.00	\$ 125.00		6.84%	\$ 137.40	9.92%	\$ 142.20	3.49%	\$ 140.15	-1.44%
Oregon Tech - Klamath Falls	\$ 130.00	\$ 141.70		9.00%	\$ 151.95	7.23%	\$ 157.30	3.52%	\$ 155.00	-1.46%
Oregon Tech - Wilsonville	\$ 130.00	\$ 141.70		9.00%	\$ 151.95	7.23%	\$ 157.30	3.52%	\$ 155.00	-1.46%
Western Oregon University	\$ 141.00 Note 1	\$ 148.00		4.96%	\$ 150.00	1.35%	\$ 155.00	3.33%	\$ 153.00	-1.29%
Oregon State University	\$ 160.00	\$ 173.00		8.13%	\$ 185.00	6.94%	\$ 191.00	3.24%	\$ 189.00	-1.05%
Portland State University	\$ 125.00	\$ 136.00		8.80%	\$ 142.00	4.41%	\$ 147.00	3.52%	\$ 145.00	-1.36%
University of Oregon	\$ 154.00	\$ 167.00		8.44%	\$ 178.00	6.59%	\$ 184.00	3.37%	\$ 182.00	-1.09%

Note 1: Western Oregon University implemented the "Western Promise", tuition increases have grown steadily, and the program is now being eliminated
 Note 2: Eastern Oregon University is implementing the "Eastern Advantage", tuition rates for qualifying incoming freshmen are expected to increase by 10%

Finance and Administration
Organizational Chart



OUTCOMES-BASED FUNDING MODEL



E&G STATE FUNDING

- 2007-09 ... \$692M
- 2013-15 ... \$546M
- HECC ... \$629M
- GRB ... \$624M
- Co-Chairs ... \$670M
- Presidents ... \$755M

COMPONENTS

- Base Funding
- Activity Funding
- Outcomes Funding

OUTCOMES

- UG Residents Degrees
- Lower Weighting for Graduate Degrees
- “Bonuses” for:
 - Pell Eligible
 - First Generation
 - Minorities
 - Veterans
 - STEM Degrees
 - Bilingual Education Degrees
 - Health Degrees

MOST RECENT PROPOSED DISTRIBUTION OF INCREASE

- EOU ... 4.3%
- OIT ... 6.9%
- OSU ... 11.3%
- PSU ... 17.1%
- SOU ... 4.3%
- OU ... 11.2%
- WOU ... 11.7%