



OFFICE OF THE BOARD OF TRUSTEES

Public Meeting Notice

May 9, 2019

TO: Southern Oregon University Board of Trustees
FROM: Sabrina Prud'homme, University Board Secretary
RE: Notice of Special Meeting of the Board of Trustees

The Southern Oregon University Board of Trustees will hold a special meeting on the date and at the location set forth below.

The board will take action on a tuition and mandatory fees recommendation for academic year 2019-20. There also will be a discussion on the fiscal year 2019-2020 budget.

The meeting will occur as follows:

Thursday, May 16, 2019

4:30 p.m. to 6:00 p.m. (or until business concludes)

Hannon Library, Room 303, DeBoer Board Room, 3rd Floor

If meeting attendance exceeds room capacity, members of the public also may view a live broadcast of the meeting from Room 206 on the 2nd floor of the Hannon Library.

Visit governance.sou.edu for meeting materials.

Visit sou.edu/video to stream the meeting proceedings at the time of the meeting.

The Hannon Library is located at 1290 Ashland Street, on the Ashland campus of Southern Oregon University. **To arrange special accommodations or to sign-up in advance for public comment, please contact Kathy Park at (541) 552-8055 at least 72 hours in advance.**



Board of Trustees
May 16, 2019

Call to Order / Roll / Declaration of a Quorum



Board of Trustees Special Meeting

Thursday, May 16, 2019

4:30 – 6:00 p.m. (or until business concludes)

DeBoer Room, Hannon Library

AGENDA

Persons wishing to participate during the public comment period shall sign up at the meeting.

Please note: times are approximate and items may be taken out of order.

- | | | | |
|---------|----------|---|---|
| | 1 | Call to Order/Roll/Declaration of a Quorum | Chair Lyn Hennion |
| | 1.1 | Welcome and Opening Remarks | |
| | 1.2 | Roll and Declaration of a Quorum | Sabrina Prud'homme,
SOU, Board Secretary |
| | 1.3 | Agenda Review | Chair Hennion |
| | 2 | Public Comment | |
| 5 min. | 3 | Consent Agenda | |
| | 3.1 | March 22, 2019 Meeting Minutes | Chair Hennion |
| | 4 | Action, Information and Discussion Items | |
| 60 min. | 4.1 | Tuition and Mandatory Fees for Academic Year 2019-20 (Action) | Dr. Linda Schott, SOU,
President |
| 15 min. | 4.2 | Fiscal Year 2019-20 Budget Information | Trustee Clough; Greg
Perkinson, SOU, Vice
President for Finance and
Administration |
| | 4.3 | Future Meetings | Chair Hennion |
| | 5 | Adjournment | Chair Hennion |

Public Comment



TO: Southern Oregon University Board of Trustees
RE: Letter of Support for Southern Oregon University
DATE: May 14, 2019

The Ashland Chamber of Commerce, currently representing over seven hundred businesses and organizations, has been deeply connected, supportive and involved as a strong community partner of Southern Oregon University (SOU) for over a century. As Ashland's largest employer and critical driver of our local and regional economy, SOU's impact on southern Oregon is undeniable. SOU has exceptional faculty providing quality, innovative experiences educating our future employees, business and community leaders.

The Ashland Chamber and SOU share a strong collaborative partnership that serves to efficiently provide several programs to the business sector and community at large. Through our partnership, we are able to reach a much broader audience in a cost-effective manner. A number of issues and educational offerings are provided for public benefit throughout the year such as:

- Regional forums on the dangers of wildfire and resiliency programs to mitigate the impacts of smoke
- Survey and analysis of the smoke impact to the visitor economy helping businesses navigate new marketing efforts
- Health and wellbeing research, analysis and program development to improve the health of Ashland's workforce
- Economic conferences on topics such as international business, technology, food and beverage manufacturing and health care
- Emergency Preparedness

These are just a few of the programs done in collaboration with SOU. The partnership goes far beyond co-sponsorship but has involved participation with faculty, students and administration working side-by-side in planning with business owners and civic leaders to tackle problems and showcase opportunities for business and community growth. In particular, we appreciate President Linda Schott's active participation on the Ashland Chamber Board and with the Ashland Coalition underscoring her commitment to community progress.

Sincerely,

Sandra Slattery
Executive Director
Ashland Chamber of Commerce

Ashland Chamber of Commerce and Visitor & Convention Bureau

PO Box 1360 • Ashland OR 97520 • 110 East Main St. • PO Box 1360 • Ashland OR 97520 • (541) 482-3486 • Fax: (541) 482-2350

ashlandchamber.com

Consent Agenda

**Board of Trustees of Southern Oregon University
Board of Trustees Meeting
Friday, March 22, 2019**

MINUTES

Call to Order/Roll/Declaration of a Quorum

Board Members:

Lyn Hennion	Present	Deborah Rosenberg	Present
Les AuCoin	Absent	Daniel Santos	Present
Jonathon Bullock	Present	Linda Schott (ex officio)	Present
Sheila Clough	Present	Barry Thalden	Present
Shaun Franks	Present	Bill Thorndike	Present
Megan Davis Lightman	Present	Steve Vincent	Absent
Paul Nicholson	Present	janelle wilson	Present
Shantzyn Nihipali	Present		

Chair Lyn Hennion called the meeting to order at 12:00 p.m. in the DeBoer Room of the Hannon Library. The Board Secretary recorded the roll and a quorum was verified.

In addition to some of the members of the President's Cabinet and individuals on the agenda, other attendees included: Joe Mosley, Marketing and Communications; Katie Pittman, Business, Communication and the Environment; Josh Lovern, Budget Office; Lee Ayers Preboski, Undergraduate Studies and HECC; Hart Wilson, Center for Instructional Support; Nicolle Aleman, Marketing and Communications; Ryan Schnobrich, Internal Audit; Chad Hamill, President's Office; John Stevenson, Information Technology; and Kathy Park, Office of the Board Secretary.

Public Comment

There was no public comment.

Consent Agenda

Trustee Franks moved approval of the consent agenda, as presented. Trustee Lightman seconded the motion and it passed unanimously.

Reports

President's Report

President Linda Schott provided highlights of the town-gown relationship with Ashland leaders and the partnership between SOU and the city. She informed trustees of the HECC commissioners who will visit SOU and attend at least one of the May meetings. President Schott, Jeanne Stallman, and Greg Perkinson have been visiting legislators. She mentioned some of the federal issues with higher education, including the executive order regarding free speech on campuses as well as proposed budget cuts to Supplemental Educational Opportunity Grants and the federal work study program.

President Schott and Dr. Chad Hamill conducted visits to the Siletz, Grand Ronde and Cow Creek tribes. Future visits are planned to the Klamath and Warm Springs tribes. Dr. Hamill added that state universities have a role to play in these relationships. He is helping SOU establish good foundational relationships that it can continue.

Vice President Janet Fratella provided a fundraising update and said that, including pending gifts, gift revenue is at \$2.5 million of the \$3.2 million goal. She mentioned new gifts, pledges, scholarships, the SOU fund match, OLLI's fundraising efforts, volunteer leadership giving, and Raider Rendezvous. The SOU Foundation welcomed employees Jennifer Niedermeyer, Cristina Sanz and Mike McKelvey.

Committee Reports

Executive and Audit Committee – Chair Hennion said Ryan Schnobrich gave an internal audit update identifying risks and reported that there have been no new allegations since his last report. Tom Battaglia discussed cybersecurity as well as the need to protect the university and ourselves; he also discussed risks to the university. The committee reviewed proposed changes to four board policies.

Finance and Administration Committee – Trustee Clough said Dr. Lee Ayers, a HECC commissioner, attended the meeting. The committee reviewed the financial dashboard and received a legislative update. Using a risk heat map, the committee had a robust discussion on risk management. Penny Burgess participated in the review of the endowment investment policy. The committee talked about preparing for the budget approval, including the tuition- and fee-setting processes, and the engagement activities to keep students and employees informed. The committee reviewed the pro forma and discussed an acceptable fund balance.

Academic and Student Affairs Committee – Trustee Santos said Drs. Karen Stone and Matt Stillman gave a presentation on Navigate, Education Advisory Board's student success software program. The committee received updates on various topics, including the Tuition Advisory Council (TAC); efforts to fill various positions; Retention Summit; Google search engine optimization; financial aid leveraging project; Enrollment Management Council; and student usage at the Student Health and Wellness Center. The Digital Cinema Program is in the final stages of approval by the HECC. The Provosts' Council is continuing its work to revise the program approval process. Trustee Wilson gave an informative presentation on SOU Social Justice and Service Programs; there was discussion on the existing peer-to-peer mentoring program and on ideas for potential community-based mentoring programs. President Schott provided an update on the Southern Oregon Higher Education Consortium. Dr. Jeff Gayton provided an update on the open educational resources program.

Student Leadership Report

Alexis Phillips was unable to attend the meeting but provided a written report for the Board Secretary to read. ASSOU has focused on concluding its student fee process; it identified issues with the process which will require a bylaws revision and changes to the process. The Speaker of the Senate has been leading efforts on the ban on blood drives; ASSOU will hold a panel discussion with representatives from the Red Cross, Student Life, and selected SOU faculty and students. ASSOU will begin elections, with a goal of completing the process by week 5 or 6 of the spring term. ASSOU has been making changes to and creating rules for its textbook sharing program.

Faculty Senate Report

Andrew Gay said Faculty Senate has approved eight new courses, two academic policies and two new bylaws amendments. It has received reports from the Inter-institutional

Faculty Senate and Association of Oregon Faculties, primarily about legislative issues. The Association for the Advancement of Science considered holding the 100th annual meeting of the Pacific division at SOU. Faculty Senate also discussed contributions of professional-track faculty to shared governance and how to track professional activities each year. Faculty Senate has invited new programs to report back on their progress.

Responding to trustees' inquiries, Mr. Gay said Faculty Senate has discussed and supports open educational resources. Faculty have mixed reactions to Navigate. There is buy in from faculty on the strategic plan and, in particular, strategic direction 1; faculty feel strongly about ownership of curriculum and are excited and ready to move on the general education component. President Schott mentioned the Professional Learning Community Expo on April 26.

Action, Information, and Discussion Items

Governance Work Group: Work Plan and Update

Vice Chair Paul Nicholson said the governance work group has been reviewing the role of the board and he reviewed the work plan included in the meeting materials.

Update on New Programs

Dr. Susan Walsh provided updates on the bachelors of fine arts in creative writing, certificate in wine business, BA/BS in healthcare administration and master of outdoor adventure and expedition leadership, as included in the meeting materials. Regarding the BA/BS in healthcare administration, Dr. Walsh said gerontology may be added as a fourth concentration.

Phyllis Hauptfeld from Academic Partnerships provided highlights on the partnership with SOU, including having a shared vision, focusing on inclusion and access, meeting the needs of adult learners, and enterprise partners. One of the unique aspects of the partnership with SOU is that SOU created a project manager, Hart Wilson; Academic Partnerships now presents that as a best practice to its new partners.

Prospective student inquiries come from all across the country but most of the enrollments come from Oregon, California and Washington. Academic Partnerships studies the market of the non-traditional student population to help its partner institutions create a strategy for adult learners. At this early point, SOU's statistics for converting applications to enrollments are very positive, exceeding Academic Partnerships' averages.

The vast majority of non-traditional undergraduate students are looking for classes in the business, education and healthcare areas of study. Academic Partnerships encourages its partners to build a foundation in one of those areas then add additional concentrations, which would increase enrollment in each area. SOU launched four programs in December 2017 and one in January 2019; four additional programs will be launched in fall 2019 and possibly two more at a later date.

Academic Partnerships provides a fully-integrated marketing team. Because of the existing connections SOU has with the community, Academic Partnerships created a field representative position. Tiffany Mays, an SOU alumna, fills that position and cultivates relationships with various local entities.

Enrollment Update

Dr. Neil Woolf was unable to attend the meeting so Dr. Walsh reported that confirmations are up over last year although applications are down. President Schott pointed out that the confirmed post-baccalaureate/graduate number is significantly, due in large part to the Academic Partnerships programs. Discussion ensued on prospective student visits to campus and recruitment ideas Dr. Woolf has.

SOU Perception Survey

President Schott provided background information on the need to conduct a general perception survey, which is a fairly standard practice at many universities.

SimpsonScarborough was selected to conduct the survey of SOU's primary market of Southern Oregon and Northern California, and secondary markets from Washington to San Francisco. In 2008, the firm did a similar study for SOU and provided SOU a copy of that study. President Schott described the detailed methodology and plan.

Discussion ensued on highlights of the final results of the survey, which were included in the meeting materials. Trustees noted the frequent connection to the Oregon Shakespeare Festival; one-third of the prospects thought SOU was an academically excellent university; art, music and theater were selected as the best-known programs, with business being selected next; SOU was recognized as affordable compared to other universities; and diversity on campus was listed as a strength. Of concern, trustees noted the top stop-out reason was the cost of living in Ashland and discussion ensued on that issue. Other concerns included a lack of visibility and name recognition; lack of online programming; and the contradiction between being recognized for academic excellence and a low rating for having qualified faculty.

President Schott said SOU's next steps would include looking for new markets; emphasizing the high quality of programs in business, education and the sciences; leveraging SOU's recognition as a center of creativity; increasing communication methods preferred by students; acknowledging Ashland's high cost of living but balancing that with an emphasis on the cultural and recreational amenities available; more career preparation and engagement with employers; investing in search engine optimization; developing more specialized marketing; and more alumni engagement.

Nicolle Aleman added that SOU marketing messages are now resonating with its targeted audiences. A big takeaway is that talking about affordability is good but must be done the right way. SOU needs to develop a new theme to replace the current, "You're Home." Vice Chair Nicholson mentioned the importance of the creative industry, which should be an SOU focus. Discussion ensued on local employer needs, how SOU can meet those needs, and marketing strategies to reach targeted audiences.

Legislative Update

Jeanne Stallman said the universities are tracking 770 bills of a couple of thousand bills overall, and 125 five are top priorities. She highlighted several bills, most of which were referenced in the meeting materials, including those that affect SOU as an employer or that regulate business operations as well as those that legislate who, what and how SOU teaches. Ten bills address free or in-state tuition for certain groups in addition to Oregon Student Association's tuition freeze bill. On SOU's behalf, Representative Pam Marsh introduced two bills: one regarding competency-based

education and one regarding the Southern Oregon Higher Education Consortium.

Turning to state budget issues, Ms. Stallman mentioned legislative visits during which, the universities focused on accountability and transparency, rather than asking for money. Legislators are concerned about the sustainability of funding in this biennium and subsequent biennia. The Ways and Means Committee holds public hearings around the state; two SOU alumni testified at the hearing in Redmond.

There are upcoming meetings regarding the PUSF and statewide programs as well as a public input day.

State Funding and Budget Update

Greg Perkinson said the challenge is to determine the potential impacts of state funding on SOU's financial health. He reviewed a comparative analysis of having an 8 and a 5 percent primary reserve, showing optimistic, pessimistic and realistic scenarios for each based on funding using the co-chairs' budget and different levels of enrollment and cost cutting measures. Summarizing the discussion in the Finance and Administration Committee, he said a 5 percent ending fund balance was unacceptable.

Mr. Perkinson said he discussed financial health issues with Jim Pinkard, [Director of the Office of Postsecondary Finance and Capital] at the HECC. Mr. Pinkard said the HECC views financial health as unique to each institution.

Discussion ensued on marketing messages for tuition increases (dollar amount vs. percentage), the benefits of attending SOU and the value of higher education.

Tuition Advisory Council Update

Dr. Susan Walsh said the TAC has discussed affordability; cutting costs; and the need to discuss dollar amounts not just percentages for potential tuition increases. The TAC has been meeting weekly but will not meet the week of finals or spring break. Dr. Walsh mentioned the TAC website, which includes minutes, training on budget issues, and checklists, among other information. She reviewed the strategic communication plan for outreach to key stakeholders. Discussion ensued on Oregon's and the nation's disinvestment in higher education, thus increasing the costs to students. Dr. Walsh said the TAC's recommendation will probably include several alternatives for President Schott to consider, along with a minority report if there is one.

Mr. Perkinson mentioned the checklists that were created to ensure compliance with House Bill 4141 and the HECC's tuition increase criteria. With input from Dr. Ayers-Preboski, discussion ensued on the previous process the HECC followed when evaluating tuition increases over 5 percent and this year's process.

Future Meetings

The board will hold a special meeting on May 16 to set tuition rates. The next regularly scheduled meeting of the board will take place on June 21, at which the board will discuss a new contract for President Schott.

Adjournment

Chair Hennion adjourned the meeting at 4:43 p.m.

Tuition and Mandatory Fees for Academic Year 2019-20 (Action)

Stage-Setting for Read-ahead Material

- This read-ahead file includes extensive background information intended to remind trustees of discussions from October 2018 to present.
- Provides insight to members of the public about the tuition and fees process and decision-shaping discussions to date
- The background section will be summarized, additional engagement information to be discussed

Tuition and Fees Discussion

-Background

- Purpose: remind the Board of all they have seen and learned in the last few months
 - Examples provided in read-ahead file, removed in presentation file
- Information on PERS and SOU's liability
- Changes in State proportion of higher education and SOU funding
- Information on Governor's and Co-chairs' proposed budgets and their impact on SOU
- Information on tuition costs at other Oregon Public Universities
- Information on financial aid and student loan debt
- Information on student fee setting process and scenarios
- Information on cost drivers for FY20
- Regular review of pro forma and possible scenarios related to budget and tuition setting
- Demographic changes and long-term outlook for enrollment

Road Map

[From Oct 2018 Finance and Administration Committee (FAC) Meeting]

- Dashboard
- Organizational Update
- Campus Cellular Antenna Update
- FY 2017 – 2018 Year-End Analysis

2018 -19 Budget Calendar

(From Oct 2018 FAC Meeting)

	Subject	Audience	Action
October 2018	<ul style="list-style-type: none"> - Review Prior Year Results - Present 1Q Actuals and Forecast - Present Student Success and Completion Model (SSCM) 	Committee Board	For Your Information (FYI) FYI FYI
January 2019	<ul style="list-style-type: none"> - Brief Budget Assumptions and Baselines - Announce Tuition Advisory Council (TAC) membership 	Committee	FYI, Review and Discussion
February 2019	<ul style="list-style-type: none"> - Present Preliminary Tuition and Fee analysis - Update Budget Baselines (Education & General; Student Life; Auxiliaries) and Pro forma 	Committee	Review and Discuss
March 2019	<ul style="list-style-type: none"> - Provide Student Fee Proposal - Present Tuition and Mandatory Fees - Discuss SSCM Impacts and Way-ahead 	Committee Board	Review, Approve and forward to Board
April 2019	<ul style="list-style-type: none"> - Complete All Baseline Budgets - Revisit Tuition and Fees rates (if not final) 	Committee Board	Review and Provide Feedback
May 2019	<ul style="list-style-type: none"> - Present Draft Budget 	Committee	Review and Approve
June 2019	<ul style="list-style-type: none"> - Approve and Adopt Budget 	Committee Board	Review; Approve and Adopt Budget

Pro Forma – Current Service Level (CSL) provided

(From Oct 2018 FAC Meeting)

- Key revenue drivers:
 - To maintain CSL, + \$130M (equates to 8.2% increase)
 - Still models tuition at 5%
- Expense drivers:
 - Same as previous chart
- Intended to shift burden from Students to State
- Closer to legacy 10% goal; but still requires sound financial management in out-years

Education and General (in thousands of dollars)	2017-19 Biennium			2019-21 Biennium		2021-23 Biennium	
	2017-18 Actual (000's)	2018-19 Prop Budget (000's)	2018-19 FORECAST (000's)	2019-20 FORECAST (000's)	2020-21 FORECAST (000's)	2021-22 FORECAST (000's)	2022-23 FORECAST (000's)
Revenue							
State Appropriations (SSCM)	20,840	21,150	21,270	23,391	24,334	25,621	26,655
State Appropriations: ETIC/SELP	433	428	381	381	381	381	381
One-time Funding			32				
Total State Funding	21,273	21,578	21,683	23,771	24,715	26,002	27,036
Tuition	37,758	42,701	37,671	40,845	42,295	43,748	45,291
Fees	3,244	3,256	3,783	3,989	4,160	4,364	4,615
Remissions	(4,242)	(4,142)	(3,767)	(4,064)	(4,229)	(4,375)	(4,529)
Tuition, net of Remissions	36,760	41,814	37,686	40,570	42,225	43,738	45,376
Misc. Other Revenue	2,811	2,100	2,100	2,243	2,247	2,219	2,442
Total Revenues	60,844	65,491	61,469	66,584	69,187	71,959	74,854
Personnel Services							
Faculty	(14,989)	(15,660)	(15,213)	(15,934)	(16,301)	(16,690)	(17,357)
Admin	(8,909)	(9,364)	(9,043)	(9,792)	(10,075)	(10,366)	(10,632)
Classified	(6,436)	(6,665)	(6,532)	(7,031)	(7,418)	(7,826)	(8,257)
Student (& Other)	(1,430)	(1,576)	(1,576)	(1,650)	(1,760)	(1,871)	(1,982)
Labor	(31,763)	(33,265)	(32,364)	(34,408)	(35,555)	(36,754)	(38,228)
OPE	(17,012)	(18,463)	(18,460)	(19,893)	(20,687)	(21,493)	(22,441)
Net Personnel	(48,775)	(51,728)	(50,824)	(54,300)	(56,242)	(58,247)	(60,669)
Supplies & Services	(9,287)	(10,892)	(10,849)	(11,137)	(11,388)	(11,644)	(11,906)
Total Supplies and Services	(9,287)	(10,892)	(10,849)	(11,137)	(11,388)	(11,644)	(11,906)
Total Expenditures	(58,062)	(62,620)	(61,673)	(65,437)	(67,629)	(69,891)	(72,574)
Net from Operations Before Transfers	2,782	2,872	(205)	1,147	1,558	2,068	2,280
Net Transfers	(2,481)	(2,591)	(1,591)	(2,680)	(2,776)	(2,869)	(2,989)
Change in Fund Balance	301	281	(1,796)	(1,533)	(1,217)	(801)	(709)
Beginning Fund Balance	6,844	7,138	7,138	5,342	3,809	2,592	1,791
Ending Fund Balance	7,145	7,419	5,342	3,809	2,592	1,791	1,082
% Operating Revenues	11.7%	11.3%	8.7%	5.7%	3.7%	2.5%	1.4%

Pro Forma – Key Take-aways

(From Oct 2018 FAC Meeting)

- Without Current Service Level (CSL) funding (+ \$130M); can't sustain low tuition rates
- Current enrollment decline strains our “healthy” fund balance;
 - Can weather the storm, but requires focused effort on enrollment recovery
- Staff developing mitigation plans to control discretionary cost

Note: initiated first of two parts...reviewed the Student Success and Completion Model with the full Board of Trustees

Road Map

(From January 2019 FAC Meeting)

- Dashboard
- HECC Update
- Tuition Advisory Council Update
- Capital Projects Update
- Audit Update
- Organizational Update
- Student Fee Collection Update

Road Map

(From January 2019 FAC Meeting)

- Vice President's Report
 - Dashboard
 - Strategic Planning and Budget Forums
 - HECC Update

- Information, Discussion and Action Items
 - Update on Student Incidental Fees
 - Tuition Advisory Council Process and Progress
 - State Funding Update
 - Update on Baseline Budgets and Pro Forma

Tuition Advisory Council Update

(February 2019)

High-Level Outline of TAC Status

- TAC was formed in Dec 2018 and has met four times
- Internal Auditor assessing TAC process against HB 4141
- Still focused on building a basic foundation
 - Revenue
 - Income
 - State funding (and GRB)
- What's next? Working with the pro forma to understand levers (what variables we can influence to drive/improve stability)



BUDGET OVERVIEW

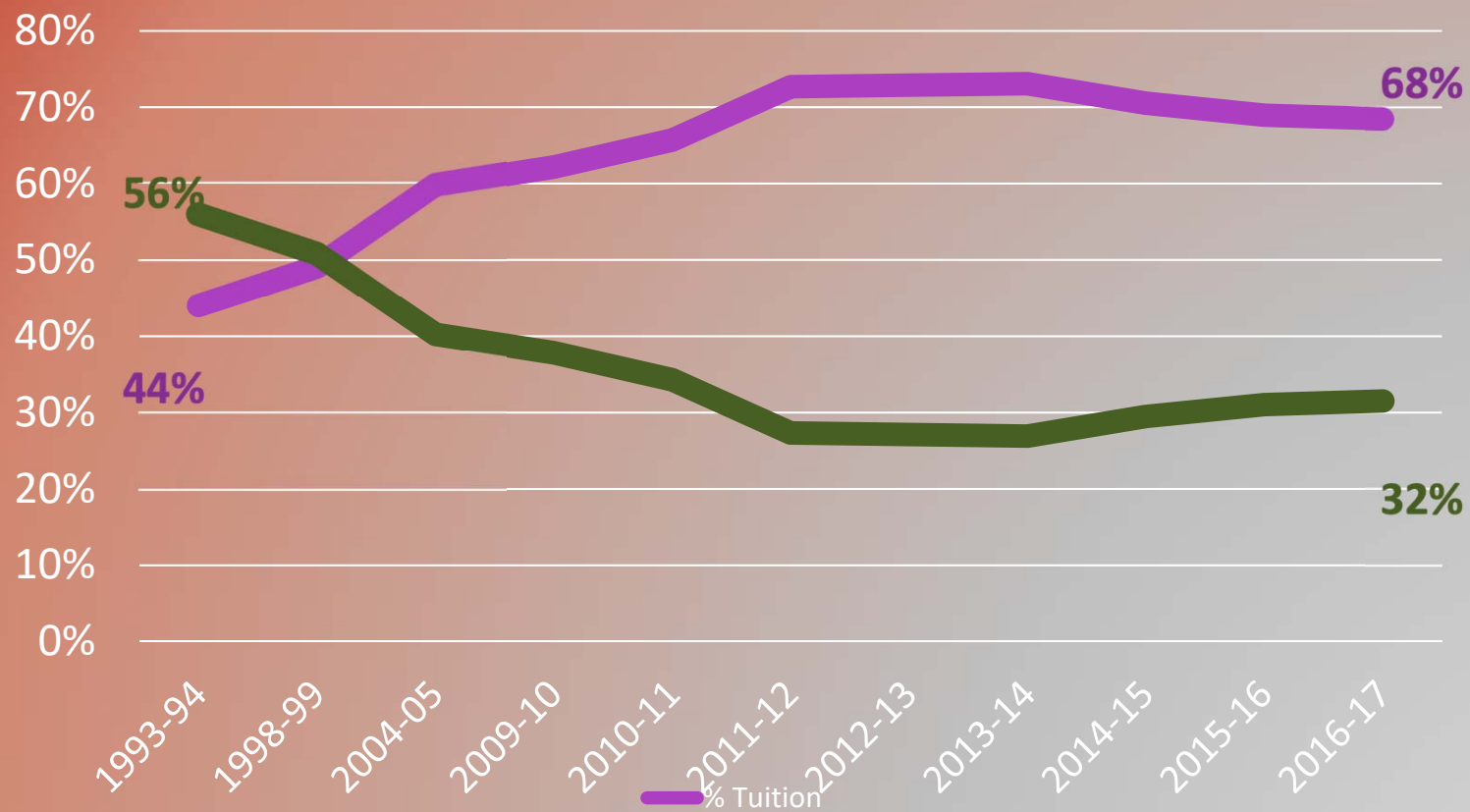
Southern
OREGON
UNIVERSITY

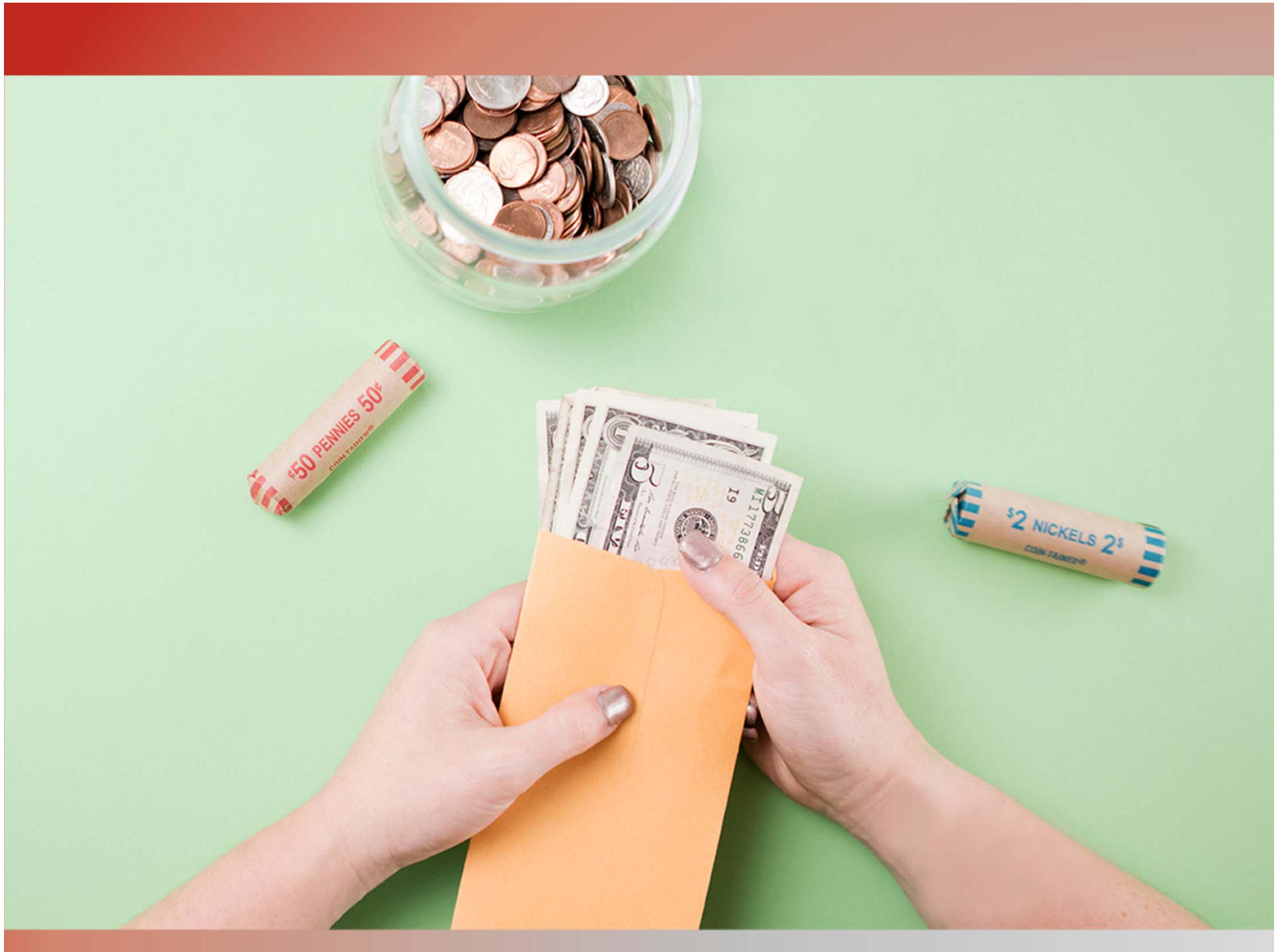
Ideally





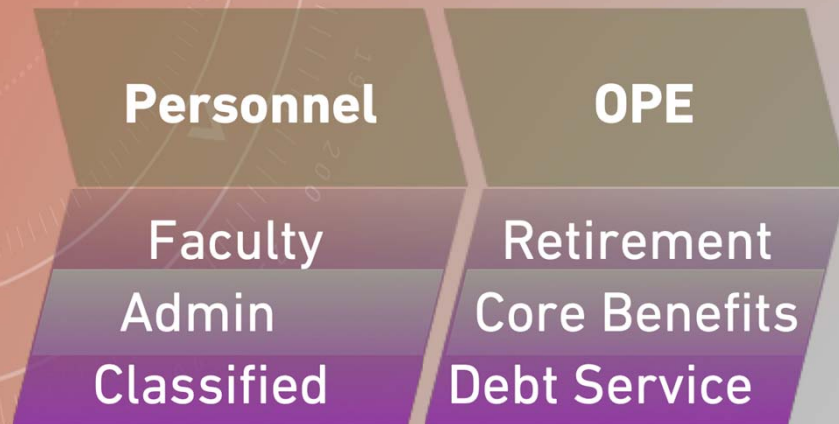
Revenues: State Support vs. Tuition



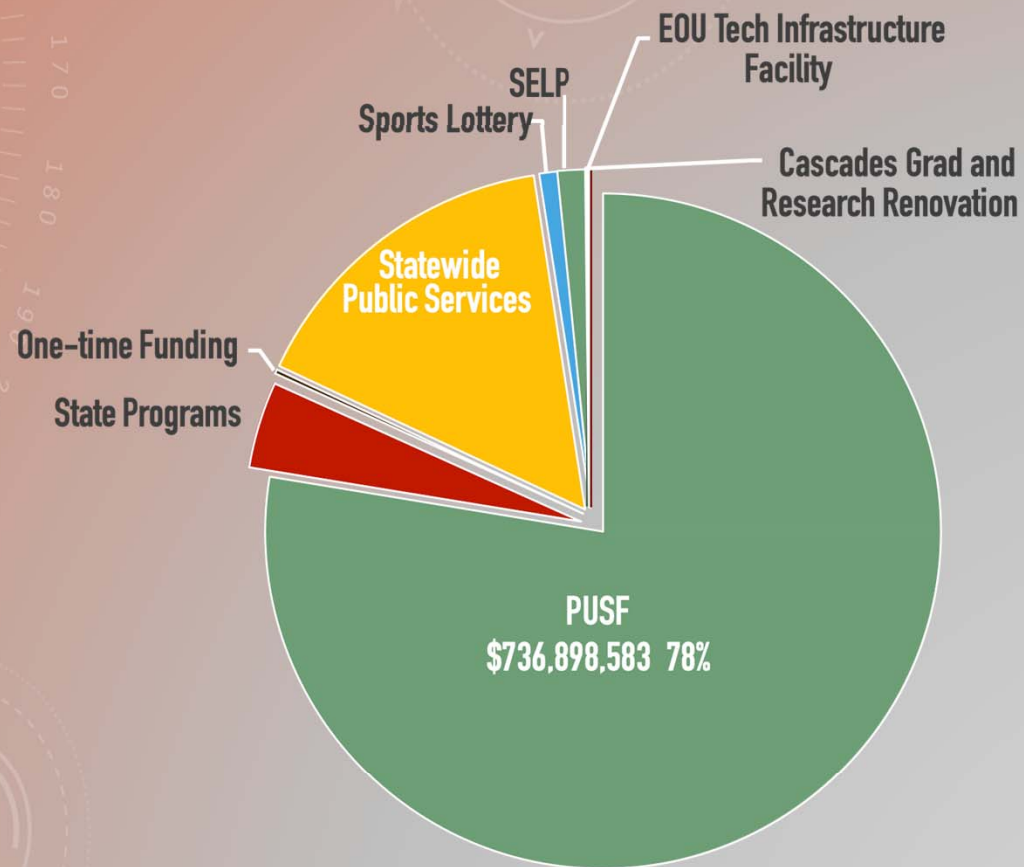




Expenses	Revenues
Personnel	State Allocations
Other Personnel Expenses (OPE)	Tuition Revenue
Supplies and Services	Fees



2017–19 *Public University Funding*



*Revenue Source:
State Allocation*

Legislature Allocates
Funds to PUSF



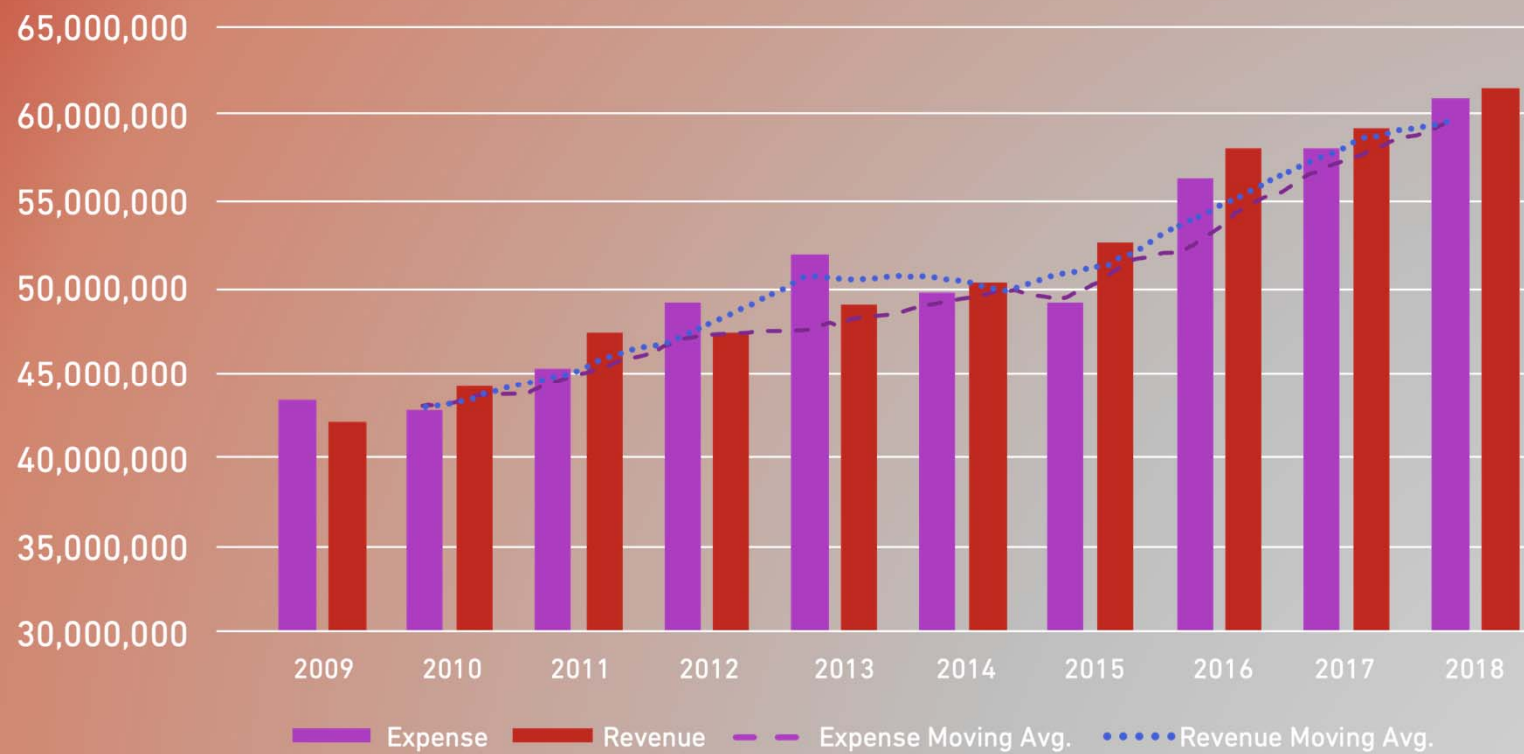
**SO Southern OREGON
U UNIVERSITY**

SOU State
Funding Based
on SSCM

**HIGHER
EDUCATION**
COORDINATING
COMMISSION

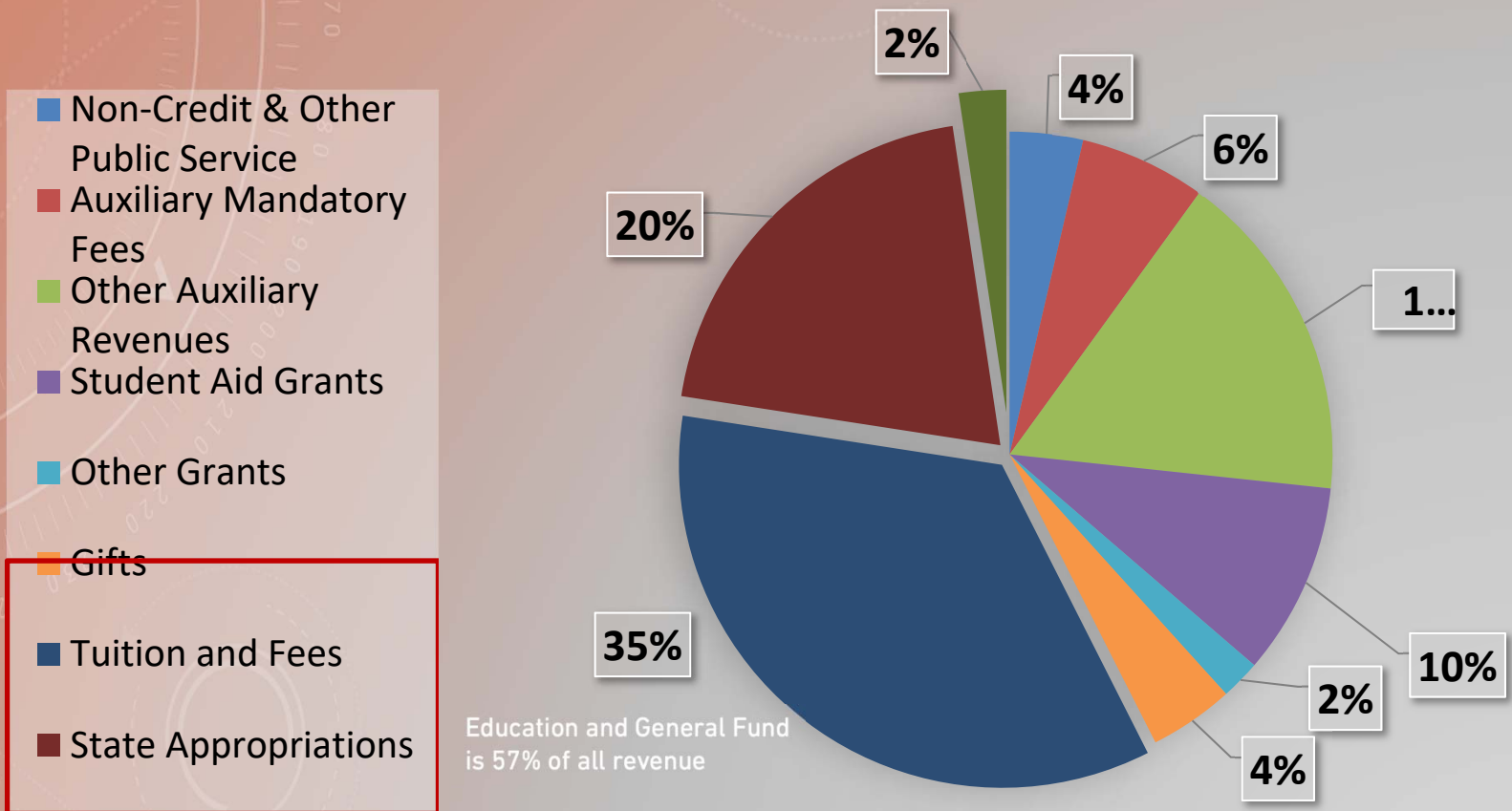


Revenue and Expense with Moving Average





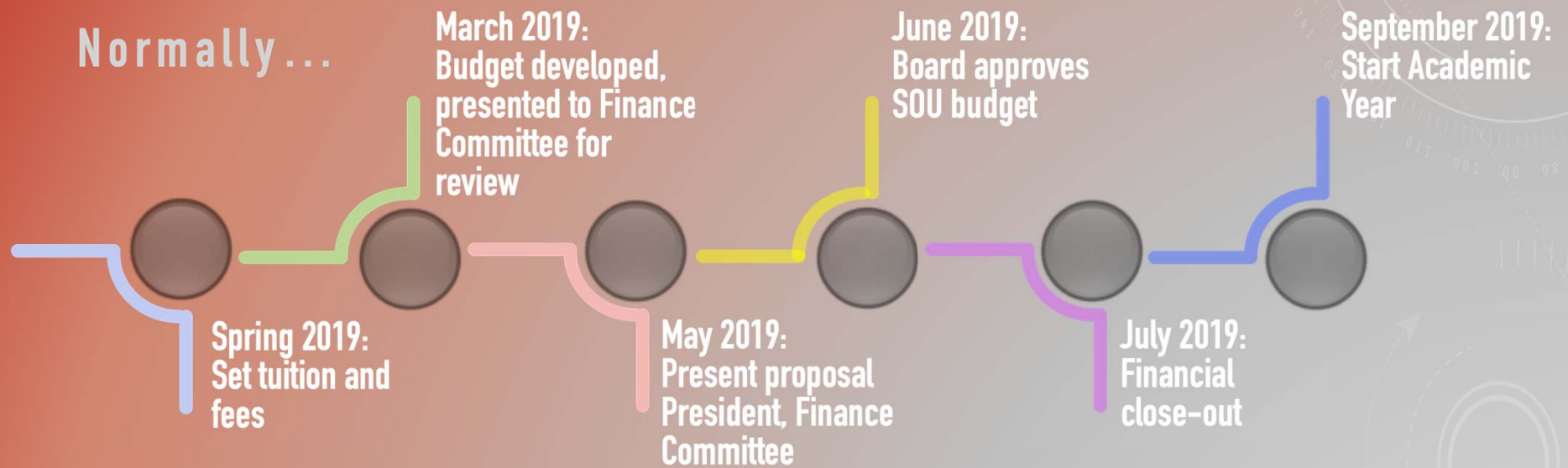
All Sources of Revenue—2018



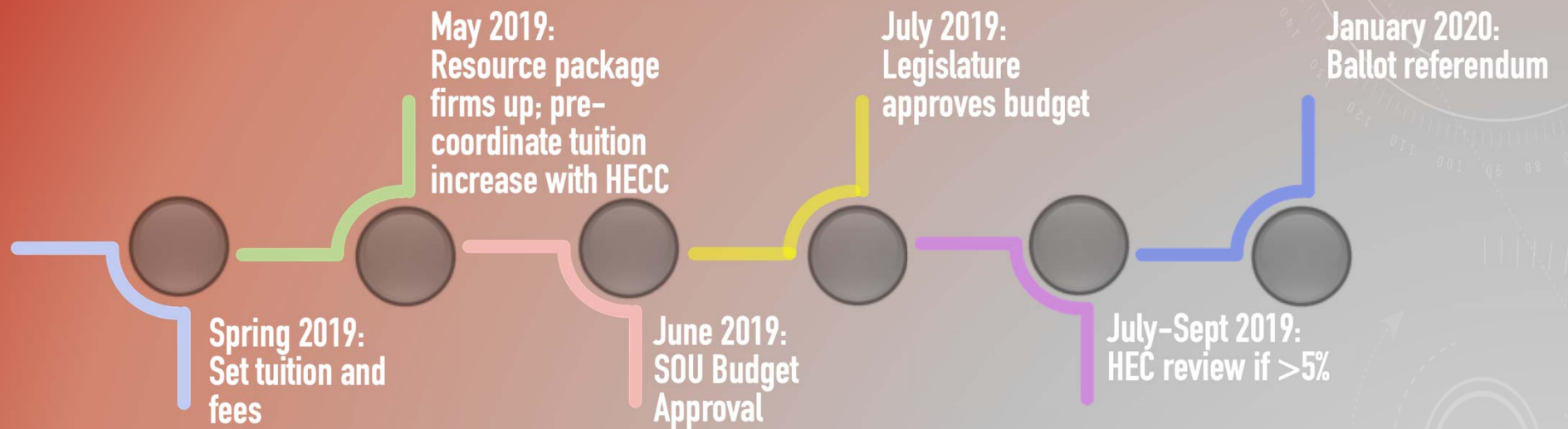


What's Next?

Normally ...



Timing is a Challenge





Education



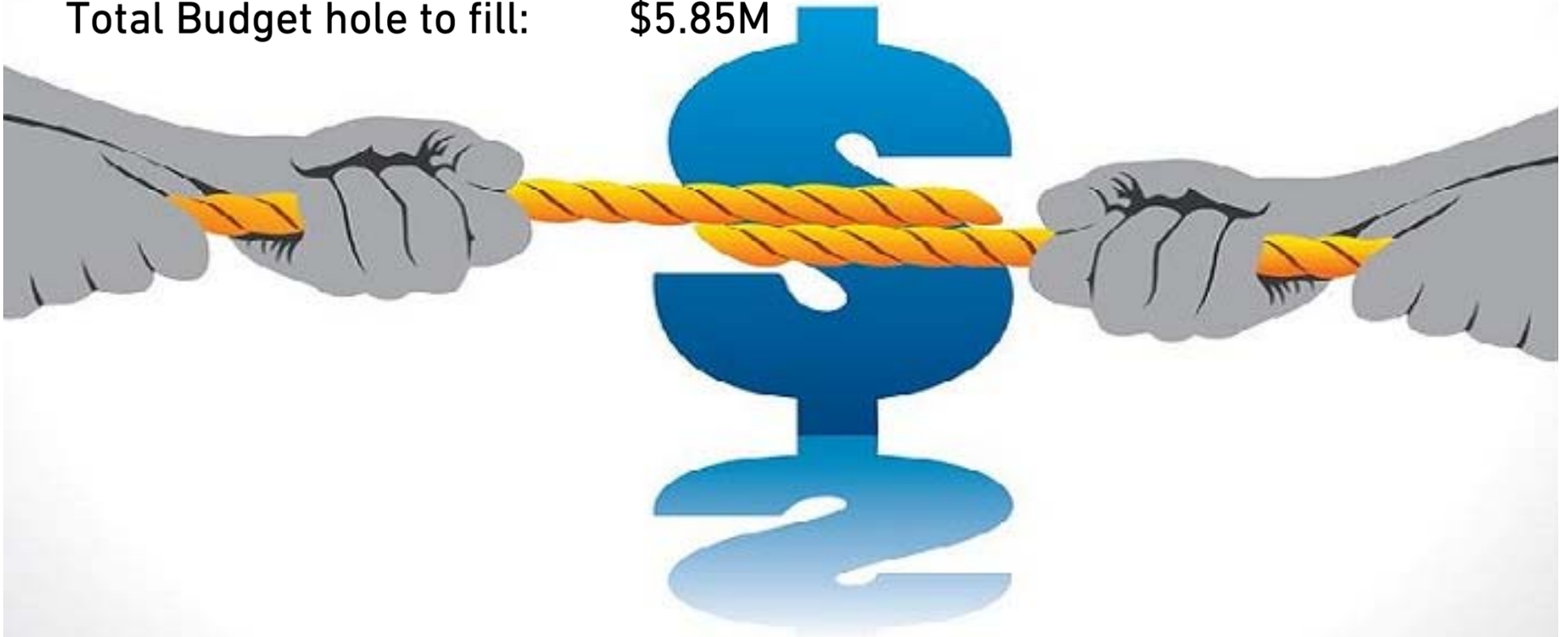
General Fund

Cost Drivers

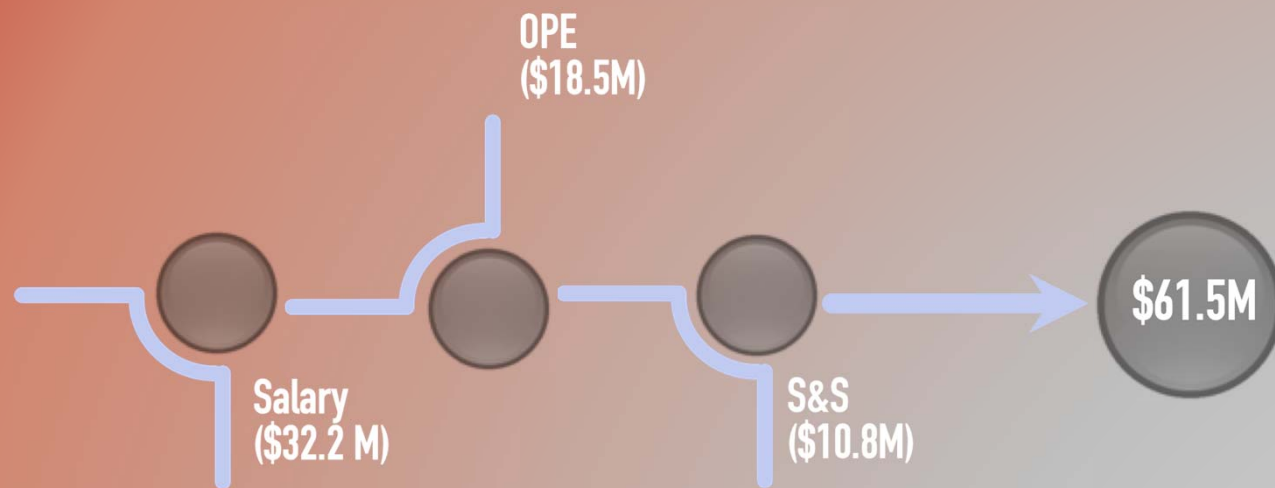
Cost Driver	Projected FY20 Cost	Notes
Faculty, Staff and Admin Salary & Wages	\$984,000	For employees paid with E&G funds only
Medical Costs	\$372,000	Assumed annual increase of 5% Positive note: Current FY19 experienced NO Growth primarily due to employees opting for less expensive plan
Retirement Costs	\$629,000	Based on new PERS rates releases by PERS board in Fall 2018
Institutional Expenses	\$288,000	Increases to utilities, insurance, debt for buildings, assessments and leases
Minimum Wage Increases	\$74,000	Increases per State of Oregon to \$11.25/hr
Total Projected FY20 Cost Increases @ GRB \$0:		\$2.35 million

Cost Driver	FY19 Base	FY20 Cost Increase	FY20 % Increase
Faculty, Staff and Admin Salary & Wages	\$33,203,000	\$984,000	2.9%
Medical Costs	\$7,454,000	\$372,710	5.0%
Retirement Costs	\$7,608,000	\$629,000	8.3%
Institutional Expenses	\$10,849,000	\$288,000	2.7%
Minimum Wage Increases	\$1,576,000	\$74,070	4.7%
Totals:	\$60.7M	\$2.35M	3.87%

FY19 Projected Deficit:	\$2.7 M
FY20 Cost Drivers:	2.35M
<u>GRB Budget – FY20 impact:</u>	<u>.8 M</u>
Total Budget hole to fill:	\$5.85M



Can We Control Costs?





ONE WAY - IMPROVE ENROLLMENT...

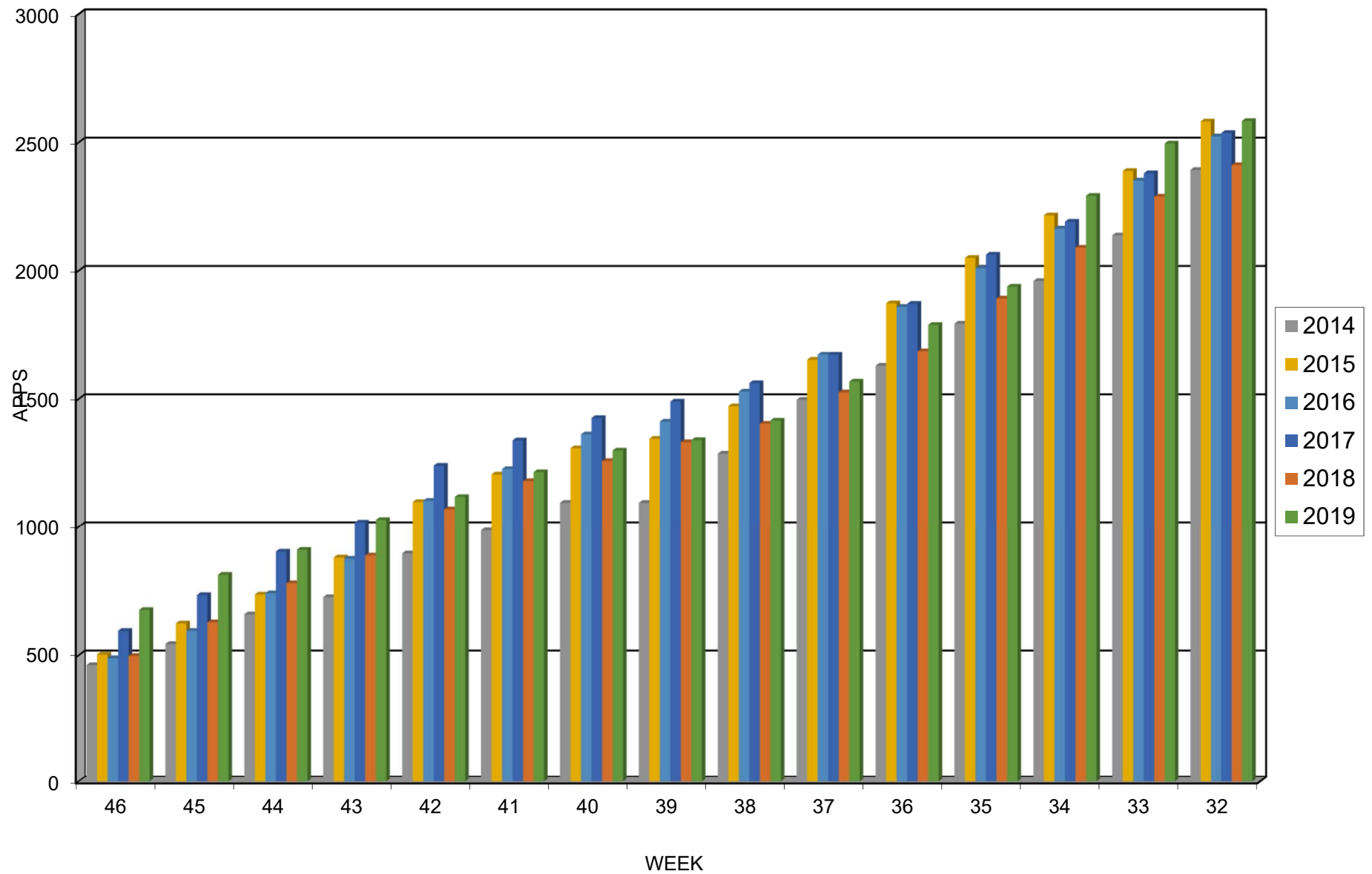
Enrollment is a function of:

1. New student (recruitment)
2. Continuing (retention)
3. Mix (residents, non-residents)

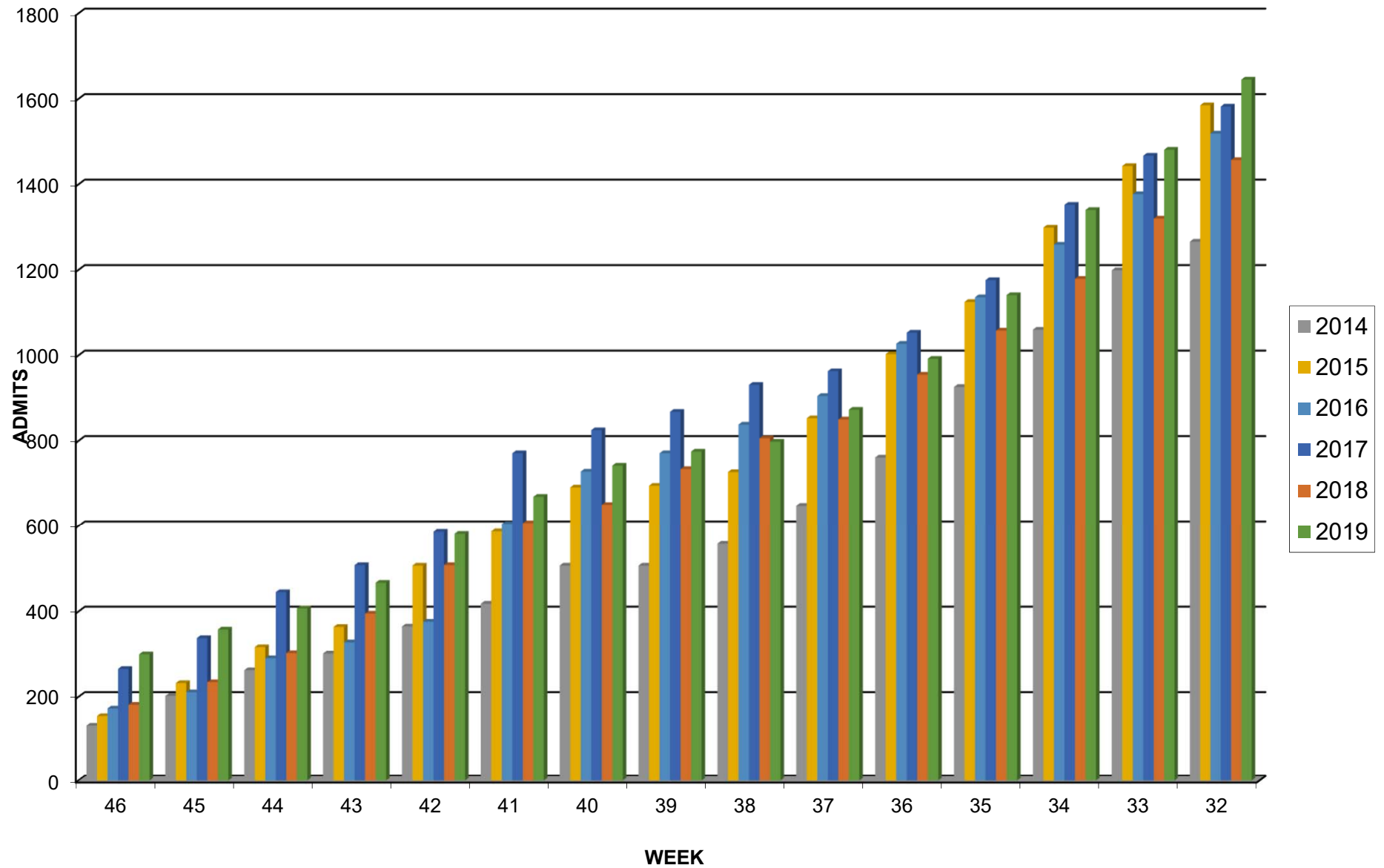
ENROLLMENT SNAPSHOT (HEADCOUNT)

	Fall 2017	Fall 2018	% Change
New Freshmen	747	645	-13.7%
New Transfer	547	432	- 21%
Continuing Students	3028	2891	-4.5%
Total	4322	3968	-8%

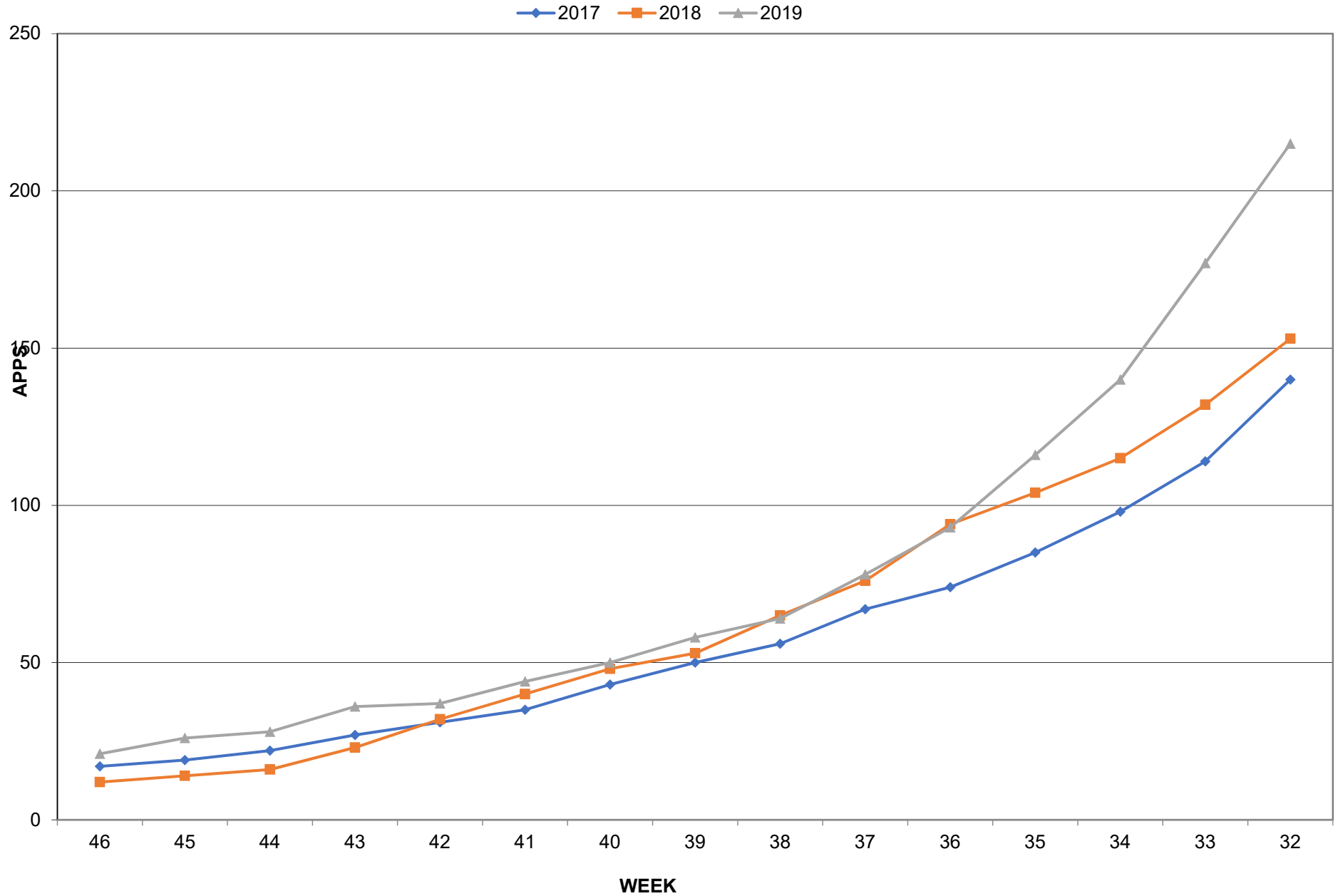
Total Fall **Applications** By Week By Year



Total Fall **Admits** By Week By Year



Total Fall **Confirmations** (FR & TR)



Road Map

(from March 2019 FAC)

- Vice President's Report
 - Dashboard
 - General Updates (HECC Update)
- Legislative Affairs Update
- Tuition Advisory Council Update
- Student Fees Update
- Review of Pro Forma and Budget Discussion

Road Map

(From April 2019 FAC)

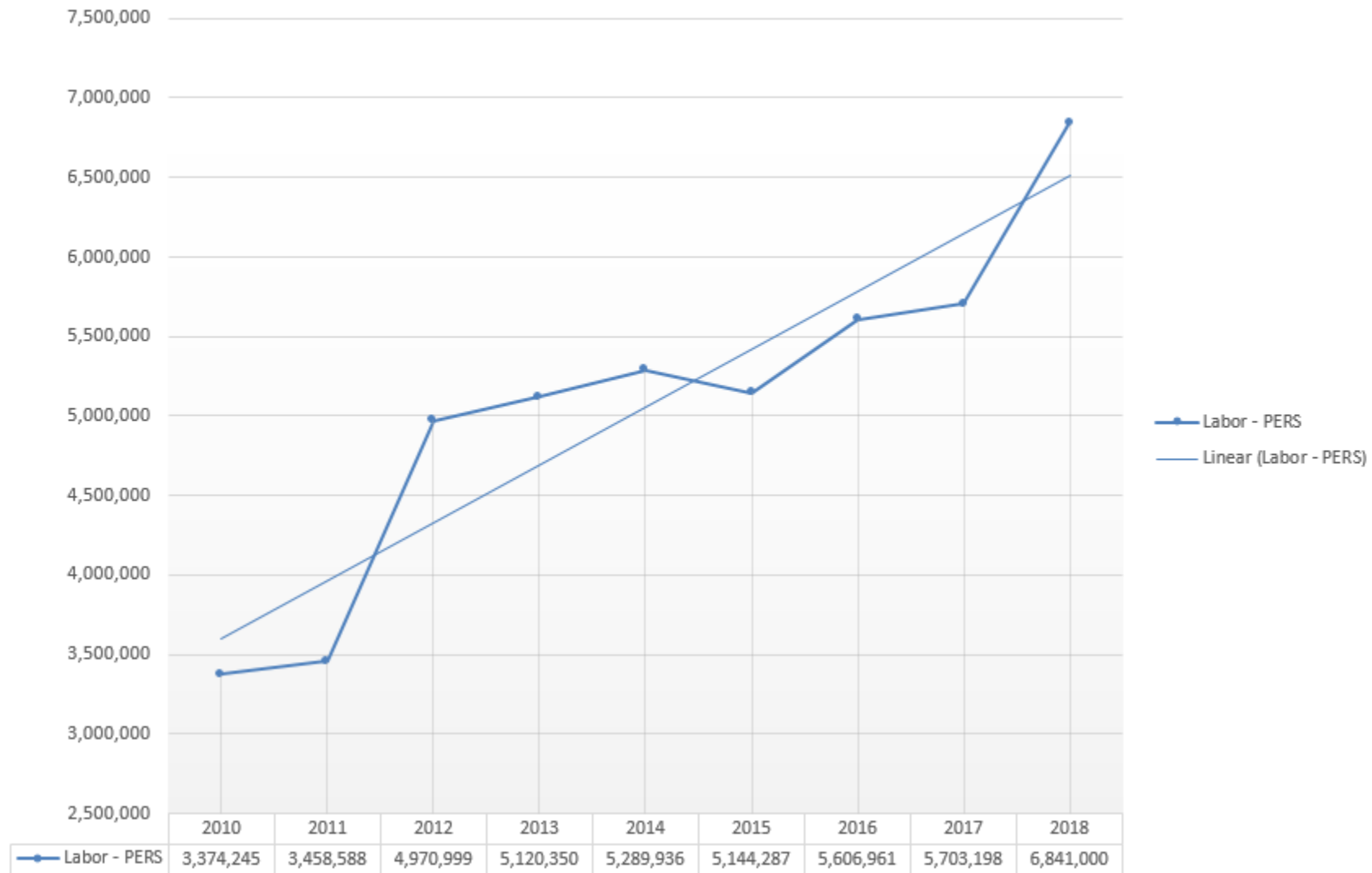
- Vice President's Report
 - Dashboard
 - General Updates
- Student Incidental and Mandatory Fees (Action)
- Tuition Advisory Council Update
- Update on 2019-21 State Funding
- Preliminary Baseline Budget Information

Information on PERS and SOU's Liability

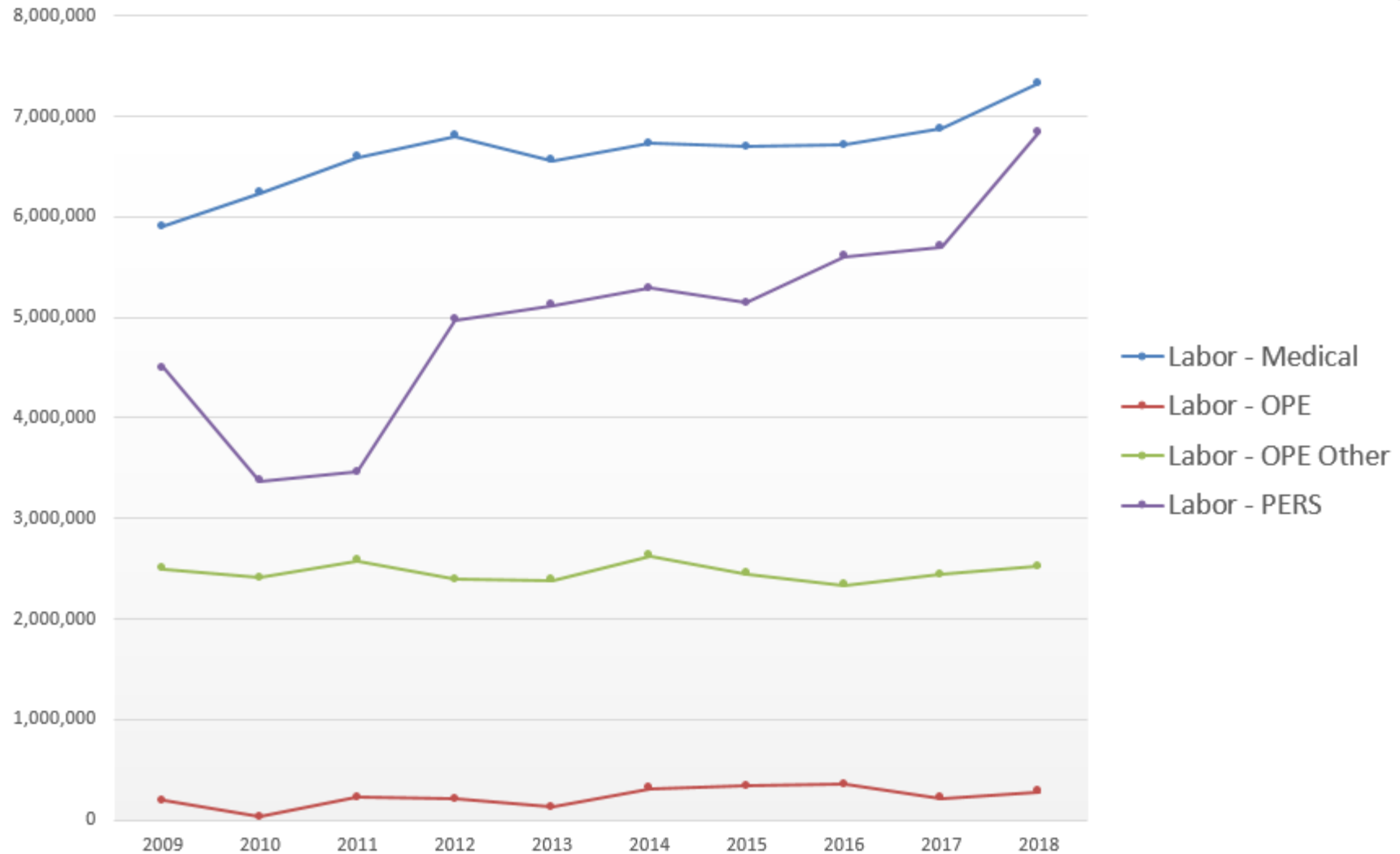


- The full Board asked for a deeper dive on PERS in January '19, and subsequent discussions ensued to ensure Board was kept abreast as this key escalating cost factor evolved
- Refer to Board minutes for other discussions
- SOU's unfunded future liability is \$30M

10yrs PERS Costs



OPE Expenses 2009 - 2018



PERS

(Notes from discussion during April 2019 FAC)

- Reminder: SOU's liability is \$30M (ref 2018 Annual Financial Report)

From the Committee Meeting read-ahead material:

- “Today the governor's staff presented her PERS reform plan”
(link to presentation below)
- There's a lot to digest here, but the one big surprise (to me): bullet point #1 of her proposed Major State Commitment:
 - Create a School PERS Offset Account (SPOA) for K-12 districts ***and a Higher Ed PERS Offset Account (HEPOA) for universities and community colleges.***
That is, she is proposing not just to bail out K-12, but also Higher Ed...
- Please find the Governor's Capital Construction presentation here:
- <https://olis.leg.state.or.us/liz/2019R1/Downloads/CommitteeMeetingDocument/190779>

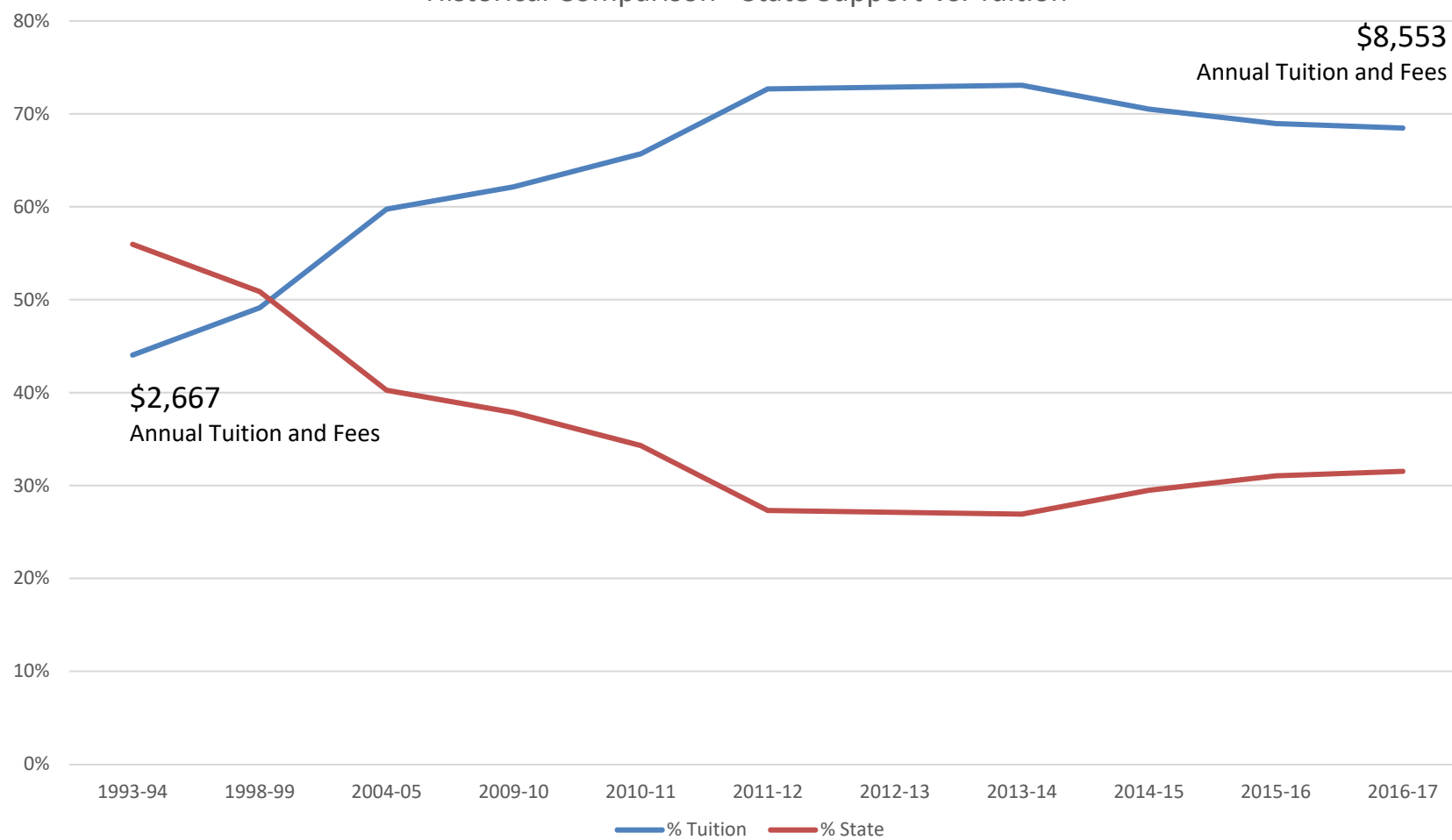
Changes in State Proportion of Higher Education and SOU Funding

Situation: Burden has Shifted to Students



Revenues: State Support vs. Tuition

Historical Comparison - State Support Vs. Tuition



Information on Governor's and Co-chairs' Proposed Budgets and the Impact on SOU

(From March 2019 FAC)

Background on Governor's Recommended Budget (GRB)



GRB (Base Budget) vs Investment Plan

Criterion	Base Budget	Investment Plan
Funding	\$736.9M (same as FY19-21) ^{1*}	\$856.9M (provides CSL only; work together on 'source')
Affordability	Sharp tuition increases (>12% increase both years of biennium)	Tuition increase <5%
Cost Controls	Will be required ^{2*}	Avoided
Financial Stability	Unstable. Steep tuition increases required to avoid negative fund balance	Stasis
Access and Equity	Eliminates OR Opportunity Grant after 2019-2020; Cuts Promise student funding	Doubles OR Opportunity Grant; Funds OR Promise, Outdoor school, and Sports Lottery;
Success	Less funding available for remissions (scholarships for need and/or merit)	Healthy remissions funding; opportunities for innovation
New investments	No dedicated funding	Funds innovation (\$10M), campus safety (\$15M), outreach (\$2.6M) and youth employment (\$15M)

*** Notes:**

- 1 – Flat funding and no Engineering Technical Science Fund (ETSF) or Sports Lottery funding
- 2 – Program reviews, S&S belt tightening, holding positions vacant, etc.

GRB and Co-Chairs' Budgets



Criterion	Base Budget	Ways and Means Co-Chairs
Funding	\$736.9M (same as FY19-21) ^{1*}	\$777.4M (provides Dept of Admin Services calculation for Current Service Level)
Affordability	Sharp tuition increases (>12% increase both years of biennium)	Tuition increase from 9% - 12% for both years
Cost Controls	Will be required ^{2*}	Some may be necessary (~ \$1M)
Financial Stability	Unstable. Steep tuition increases required to avoid negative fund balance	Strategic Reserve ratio only 5%
Access and Equity	Eliminates OR Opportunity Grant after 2019-2020; Cuts Promise student funding	Some OR Opportunity Grant; Funds OR Promise, Outdoor school, and Sports Lottery;
Success	Less funding available for remissions (scholarships for need and/or merit)	Healthy remissions funding; opportunities for innovation
New investments	No dedicated funding	May fund innovation, campus safety, outreach and youth employment

*** Notes:**

1 – Flat funding and no Engineering Technical Science Fund (ETSF) or Sports Lottery funding

2 – Program reviews, S&S belt tightening, holding positions vacant, etc.

Comparative Analysis of 8% Primary Reserve

(From March FAC)

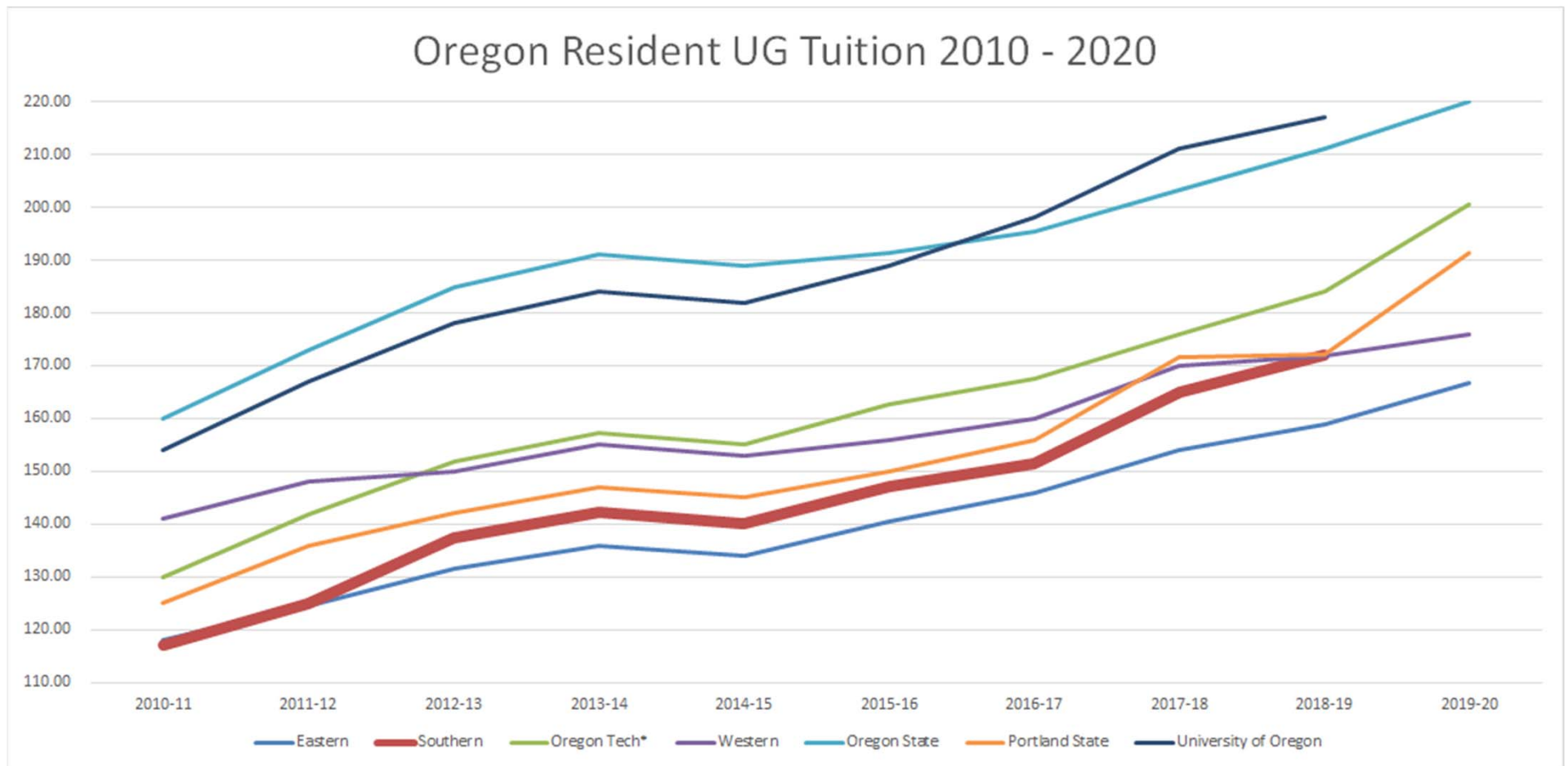


Primary Reserve Scenarios	Tuition % Increase	Tuition Cost Increase	Ending Fund Balance (\$M)			% Operating Revenue		
			18/19	19/20	20/21	18/19	19/20	20/21
Optimistic @ 8% <ul style="list-style-type: none"> \$40.5M (DAS) +2% Biennium Enrollment +3M Biennium Earmarks Flat S&S 	FY20: 9.75% FY21: 2.25%	FY20: \$765 FY21: \$180	4.9	5.5	5.7	8.1%	8.1%	8.2%
Pessimistic @ 8% <ul style="list-style-type: none"> \$40.5M (DAS) -2% Biennium Enrollment 1M Cost Cutting (split across biennium) 	FY20: 15.8% FY21: 3.8%	FY20: \$1,215 FY21: \$315	4.9	5.3	5.6	8.1%	7.9%	8.0%
Realistic @ 8% <ul style="list-style-type: none"> \$40.5M (DAS) FLAT Biennium Enrollment 1M Cost Cutting (split across biennium) 	FY20: 14.9% FY21: 2.75%	FY20: \$1170 FY21: \$225	4.9	5.5	5.6	8.1%	8.1%	8.0%

Information on Tuition Costs at Other Oregon Public Universities

(From previous presentations)

SOU in Relation to Oregon Comparators



Updated View of SOU in Relation to Oregon Comparators*



Resident Undergraduate Tuition Rates

Institution	2016-17	2017-18	2018-19	2019-20	AY % Increase
Eastern	146.00	153.95	159.00	166.79	4.90%
Southern	151.46	165.04	172.00		
Oregon Tech	167.63	176.01	183.93	200.48	9.00%
Western	160.00	170.00	172.00	176.01	2.33%
Oregon State	195.33	203.33	211.00	220.05	4.29%
Portland State	156.00	171.60	172.23	191.36	11.11%
University of Oregon	198.00	211.00	217.00		

* Rates based on latest available board decisions or publicly available proposals, as appropriate.

Information on Student Loan Debt, College Affordability, and Financial Aid

(From January 2019 Board of Trustees Meeting)

Student Loan Debt Snapshot

- \$1.5 TRILLION in student loan debt spread among 44 million borrowers
- Student borrowers who have borrowed federal loans
 - (excludes private or parent loans)
- Graduates of 4-year public universities

National vs. Oregon Student Debt by the Numbers



National	Oregon
66% of student borrowers	63% of student borrowers
\$30,100 per borrower after graduation	\$27,697 per borrower after graduation
10.8% National Cohort Default Rate	12.8% State Cohort Default Rate

Regional Picture

	Western Oregon University	Eastern Oregon University	Oregon Institute of Technology	Southern Oregon University
Students w/ Loans	79%	50%	39%	43%
Average Debt at Graduation	\$24,955	\$22,107	\$22,875	\$21,313
Average amount borrowed per year	\$7,403	\$7,357	\$7,843	\$6,939
Default Rate	7%	9.4%	5.5%	8%

The SOU Student

Oregon Resident on Campus

\$23,853

Costs per Student (15 credits per term)

- \$9,654 Tuition & Fees
- \$14,199 Housing & Meal Plan

Financial Aid Package

- PELL \$6195
- OOG \$3,200
- Subsidized Loan \$3,500
- Unsub. Loan \$2,000

This student has to come up with \$8,958 per year, on average .

\$14,895

The SOU Student

Oregon Resident Commuter

\$19,548

Costs per Student

(15 credits per term)

- \$9,654 Tuition & Fees
- \$9,894 Off Campus Costs

Financial Aid Package

- PELL \$6195
- OOG \$3,200
- Subsidized Loan \$3,500
- Unsub Loan \$2,000

This student has to come up with \$4,853 per year, on average.

\$14,695

The SOU Student

*Western Undergraduate Exchange (WUE) Student
on Campus*

\$27,273

Costs per Student (15 credits per term)

- \$13,074 Tuition & Fees
- \$14,199 Housing & Meal Plan

Financial Aid Package

- PELL \$6195
- Subsidized Loan \$3,500
- Unsub Loan \$2,000

*This student has to come up with
\$15,578 per year, on average.*

\$11,695

The SOU Student

WUE Student Commuter

\$22,968

Costs per Student (15 credits per term)

- \$13,074 Tuition & Fees
- \$9,894 Off Campus Costs

Financial Aid Package

- PELL \$6195
- Subsidized Loan \$3,500
- Unsub Loan \$2,000

Student has to come up with \$11,273 on average per year.

\$11,695

The SOU Student

Undergraduate non-resident/non WUE student



\$39,783

- **Costs per Student**
(15 credits per term)
- \$25,584 Tuition & Fees
- \$14,199 Room and Board On Campus

Financial Aid Package

- PELL \$6195
- Subsidized Loan \$3,500
- Unsub Loan \$2,000

**Student has to come up with \$28,088 per year, on average.*

\$11,695

Types of Need and Merit-Based Financial Aid



Federal Aid

- Federal Pell Grants
- Work Study
- Loans

State Aid

- Grants
- Scholarships

SOU Aid **Last Dollars Applied**

- Merit Scholarships
- Scholarships (SOUF-funded)
- Student Employment
- Need-based Tuition Assistance (Senior Completion grant, Tuition Buy Down, SSITA, Discretionary)

How is SOU Aid Helping Students Afford College?



**77% of Students With Financial Aid
Need Met**

- \$4.1 Million Tuition Assistance
- \$126,000 Admission Discretionary Funds
- \$100,00 Housing Discretionary Funds
- \$150,000 Senior Completion Grant
- \$50,000 SSI Retention Grant

Additional Information on College Affordability

(From March FAC on affordability)

Oregon Students Face Cost Challenges Beyond Tuition

Average Student Budgets: Oregon Postsecondary Institutions, 2018-19

	Tuition and Fees	Books and Supplies	Room and Board	Personal Expenses + Transportation	TOTAL
Public Universities	\$10,111	\$1,222	\$11,761	\$2,707	\$25,801
Community Colleges	\$5,399	\$1,402	\$9,534	\$3,039	\$19,374
Private Institutions*	\$35,195	\$1,057	\$10,814	\$2,620	\$49,557

These are average estimates based upon tuition and standard fees based on full-time, full-year enrollment at 15 credits per term. Actual student budgets vary widely depending on student circumstances, from availability of housing options to the variety of books/supplies costs for different programs of study.

Completion Impacts Affordability

Time to Completion Impacts Affordability

- Increased credits
- Financial aid limits

3.5
years

Associate Degrees

3 years
+ pre-
transfer
years

Bachelor's Degrees for
Transfer Students

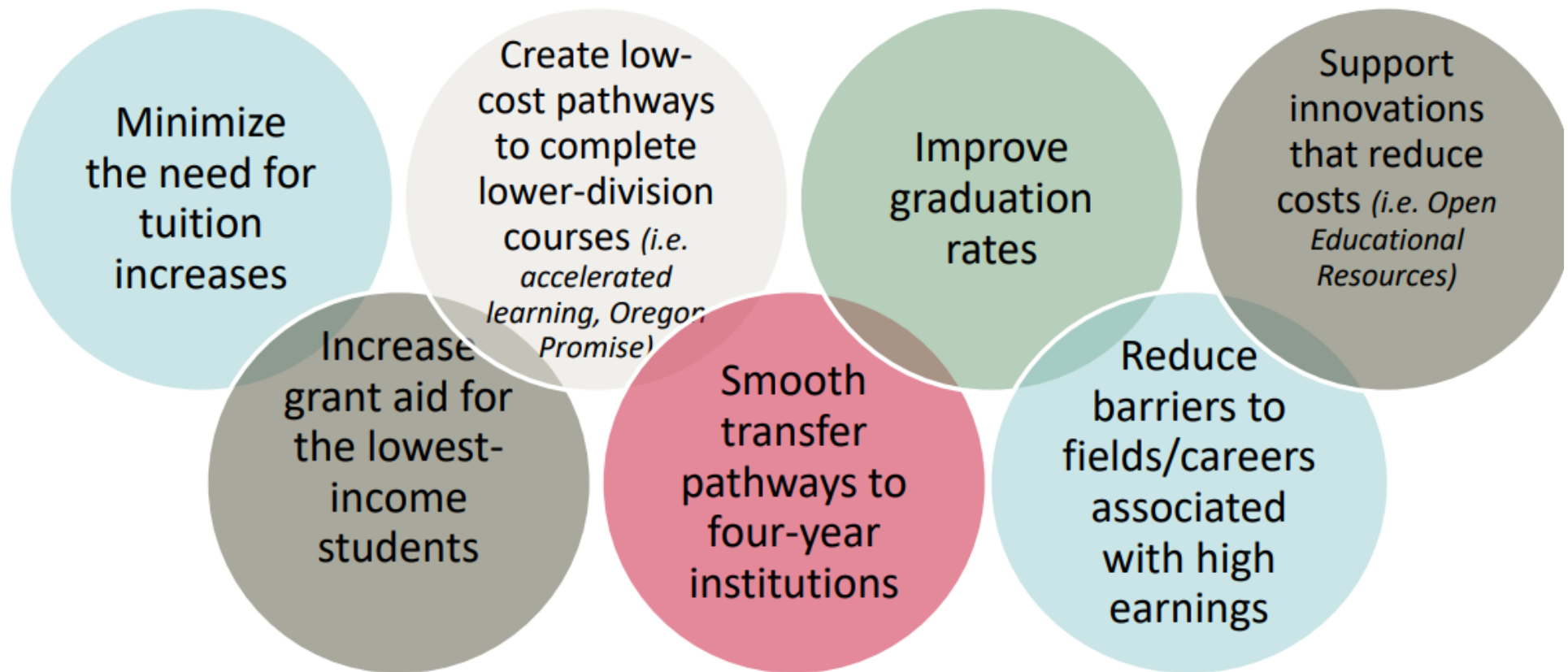
4.5
years

Bachelor's Degrees for
First-time Freshmen

Whether Students Complete Impacts Affordability

- Students who complete have higher incomes and lower unemployment rates than students who do not complete.*
- Student loan repayment rates are higher among those from higher income backgrounds who complete their degrees.**

Affordability: A Multi-Dimensional Problem Requires a Multi-Dimensional Solution



Information on Process and Scenarios

High-level Summary of Process

- Educated new Board members (from Oct '19 – present)
- Established TAC in compliance with HB 4141
- Focused Strategic Communications Plan (pg. 85-96)
- Conducted Internal Audit of process and products
- Monitored Legislative Affairs activities throughout
- Developed and implemented advocacy plan
- TAC recommendation to President on 5-8-19
- President recommendation to Finance Committee and Board

Strategic Communication Plan

Enabling Student, Faculty and Staff Engagement

The following table outlines actions, frequency and ownership of the communication and outreach plan for Southern Oregon University. The purpose is to ensure key stakeholders know what actions are being taken and fundamentally, to ensure we create opportunities to provide information and receive feedback.




1. Outline of Activities, and key messages:





When? (date and frequency)	What? Action / Event	Ownership	Media / Approach	Message or Desired Outcomes
11/29/18	Met with Student Fee Committee (SFC) Chair	Deb	In person	Initial meeting
12/4/18	Formed TAC	Sue	In person	Formed team, communicated expectations
12/12/18	Met with SFC Chair	Josh / Beau	In person	Listened and provided feedback as professional staff advisers
12/20/18	Met with SFC Chair	Josh / Deb / Beau	In person	Listened and provided feedback as professional staff advisers
1/9/19	Met with SFC Chair	Josh / Deb / Beau	In person	Listened and provided feedback as professional staff advisers
1/11/19	Met with SFC	Josh / Deb / Beau	In person	Listened and provided feedback as professional staff advisers
1/17/19	Finance Committee (BOT)	Greg	In person and public record	Budget basics, State funding, pro forma outlook
1/18/19	Board of Trustees	Sabrina	In person and public record	State funding prognosis, pro forma outlook
1/18/19	Met with SFC	Josh / Deb / Beau	In person	Listened and provided feedback as professional staff advisers
1/25/19	Met with SFC	Josh / Deb / Beau	In person	Listened and provided feedback as professional staff advisers
1/ 28/19	TAC meeting	Sue	In person	Budgeting basics
1/31/19	HECC Finance Director orientation	Greg	In person	SOU budget process, constraints and opportunities
2/1/19	Met with SFC	Josh / Deb / Beau	In person	Listened and provided feedback as professional staff advisers
2/ 4/19	TAC meeting	Sue	In person	State funding prognosis
2/11/19	TAC meeting	Sue	In person	Developed Social Media outreach plan / ideas
2/12/19	Open Forum	Greg and President	In person	Budgeting 101, State Funding and connection to Strat Plan

2/13/19	Open Forum	Greg and President	In person	Budgeting 101, State Funding and connection to Strat Plan
2/15/19	ASSOU Budget Committee	Josh / Deb	In person	Listened and provided feedback as professional staff advisers
2/18/19	TAC	Sue	In person	Stop the shift; pro forma levers
2/20/19	AAC Advisory Committee	Josh / Beau	In person	Listened and provided feedback as professional staff advisers
2/21/19	Finance Committee	Greg	In person and public record	Dashboard, TAC update, SFC update and pro forma levers
2/21/19	EAAC Advisory Committee	Josh / Deb	In person	Listened and provided feedback as professional staff advisers
2/24/19	EAAC Advisory Committee	Josh / Deb	In person	Listened and provided feedback as professional staff advisers
2/25/19	TAC	Sue	In person	
2/25/19	EAAC Advisory Committee	Josh / Deb	In person	Listened and provided feedback as professional staff advisers
2/26/19	Affordability Fair at SU	Greg and Josh	In person and Visual aids	Stop the Shift
2/28/19	SU Advisory Committee	Josh / Deb	In person	Listened and provided feedback as professional staff advisers
3/1/19	SU Advisory Committee	Josh / Deb	In person	Listened and provided feedback as professional staff advisers
3/2/19	SU Advisory Committee	Josh / Deb	In person	Listened and provided feedback as professional staff advisers
3/4/19	TAC	Dennis S.	In person	Stop the shift; pro forma levers
3/4/19	Facebook Post	Nicolle	Social media	Stop the Shift
3/4/19	Tweet	Nicolle	Social media	We need your help
3/4/19	Instagram Post	Nicolle	Social media	1,214 impressions / 58 views-likes
3/4/19	Instagram Story	Nicolle	Social media	564 views / likes
<u>See Table 1 Below: Full Listing of Social Media Outreach Activities</u>				
3/4/19	SFC	Josh / Deb / Beau	In person	Listened and provided feedback as professional staff advisers
3/5/19	ASSOU Senate	Greg	Presentation	Open forum repeat – budget basics
3/6-7/19	Visits with Legislators	Linda, Jeanne & Greg	Office calls	Accountability and transparency (and cost savings if asked)
3/8/19	SFC	Josh / Deb / Beau	In person	Listened and provided feedback as professional staff advisers

3/11/19	TAC	Sue	In person	Stop the shift; pro forma levers
3/11/19	SFC	Josh / Deb / Beau & Greg	In person	Extra credit with Dennis's class?
3/14/19	Retention Summit	Neil, Sue, Greg	In person	Retention overview & promotional efforts
3/18/19	TAC	Sue	In person	Stop the shift; pro forma levers
3/21/19	Finance Committee (BOT)	Greg	In person and public record	Dashboard, TAC update, SFC Update, State funding, pro forma outlook
3/22/19	Full Board mtg	Sabrina	In person and public record	TAC update, Gov Affairs, State funding, pro forma outlook
3/25/19	TAC	Sue	In person	Stop the shift; pro forma levers
4/1/19	TAC	Sue	In person	Stop the shift; pro forma levers
4/8/19	TAC	Sue	In person	Stop the shift; pro forma levers
4/11/19	Student / Campus Leaders Conversation about Tuition and Budget	Sue, Neil, Greg	In person	Budget basics / tuition basics and way ahead
4/17/19	TAC	Sue	In person	Stop the shift; pro forma levers
4/18/19	HB4141 cross check	Linda	In Person	Results of Checklist / process review (Gate review)
4/24/19	TAC	Sue	In person	Stop the shift; pro forma levers
5/1/19	TAC	Sue	In person	Stop the shift; pro forma levers
5/1/19	Athletics Open Forum	Sue, Neil, Greg	In Person	Stop the Shift
5/6/19	Budget brief to Faculty Senate	Greg	In Person	Stop the Shift...and the Faculty's role
5/8/19	TAC	Sue	In person	Stop the shift; pro forma levers
5/10/19	Student / VP Forum in Greensprings Dorm Lobby	Sue, Neil, Greg	In person	Discuss budget, tuition and fees
5/13/19	TAC	Sue	In person	Stop the shift; pro forma levers
TBD	Student Open Forum	Greg	In person	Present TAC recommendation and Board's decision
5/16/19	Finance Committee (BOT)	Greg	In person and public record	TAC and SFC Recommendation
5/16/19	Full Board mtg	Sabrina	In person and public record	Tuition and Student Fee decision

Table 1 – Full Listing of Communications Outreach Activities

Social Media Platform	Date	Thumbnail Sample	Views/Likes	Impressions	Saves	Shared
Instagram	4/10/2018		140	-	-	-
Instagram	04/11/2018		206	-	-	-
Facebook	04/10/2018		6	1,134	0	1
Twitter	04/10/2018		2	1,679	-	3
Facebook	04/11/2018		3	1,887	0	1
Twitter	04/11/2018		6	1,547	-	4
Instagram	03/04/2019		58	1,214	3	2
Instagram Story	03/04/2019		564	-	-	-
Twitter	03/04/2019		5	3,165	-	7
Facebook	03/04/2019		5	2,085	0	3
Instagram	04/09/2019		55	1,171	2	7
Instagram Story	04/09/2019		616	-	-	-

Twitter	04/09/2019		7	1,580	-	6
Facebook	04/09/2019		4	1,695	0	2
Instagram	05/02/2019		36	1,028	0	1
Instagram Story	05/02/2019		419	-	-	-
Twitter	05/02/2019		6	1,513	-	3
Facebook	05/02/2019		0	1,428	0	0
Instagram	05/09/2019	(not yet occurred)	-	-	-	-

Addendum 2: Key Messages and Themes:

The state funding model shifted the burden, putting it on students. “Stop the shift”

We are good stewards of the funding we receive from the state, and from our students (see one-pager that follows).

We had a very good year, financially, in Fiscal Year 2017, and invested in Student Success programs. We need continued investment to maintain key student success programs (SOU Aid, Jack/Jo, Bridge, etc.)

We are both transparent, and accountable to: the Board, the states, and our stakeholders (students, faculty and staff)

We already imposed significant cost reductions in the last decade. Now, our discretionary ‘spending’ (costs) are only 7 cents on the dollar (we can’t control escalating PERS and PEBB costs, and over 80% of our labor costs are tied to Union agreements (faculty and classified staff))

The Technical and Regional Universities (TRUs) have unique needs, based on scale, economics in the local region and demographics.

The Southern Oregon Higher Education Consortium was recently formed, and is looking for ways to create synergy between the SOU, OIT, RCC and KCC to better serve students and the region. And, HECC talking points:

- Postsecondary education and training in Oregon involves a highly diverse set of pathways and institutions, serving a highly diverse set of learners.
- Funding cuts proposed in the GRB would have profoundly negative consequences for student access, affordability, and completion.
- Overall, Oregon’s postsecondary attainment rates are slightly better than average nationally, but we have significant equity gaps and are far from meeting our state goals.
- Postsecondary education produces enormous return-on-investment for individuals and communities.
- Based on statewide enrollment, completion, and affordability trends, it’s clear that Oregon’s current trajectory will not meet state goals.
- Due to relatively low levels of state investment in postsecondary education, Oregon is a relatively high-tuition, low-aid state.
- Postsecondary education has the power to close income gaps while increasing prosperity overall. It is a ticket to the middle class. But if the ticket price rises too high, it will have the opposite effect.

Addendum 3: Other Background Materials (Key Data and Graphics)

Cost Saving and Continuous Improvement ideas since 2015 include:

- Managed printing; Centralized printing/copy management - \$75K
- Centralized order consolidation; Savings on shipping and discount access - \$15K
- Amazon Bus Accts; Consolidation of accounts for discount shipping - \$1.5K
- SOU - US Communities; Purchasing Cooperative - \$10K
- Optimize Steam Utilization; Replace Boilers - \$100K / year
- Improved Long Term Gas Price Hedges; Renegotiated more advantageous gas price hedges - \$80K recurring
- Replace chillers; Replace two 50-year old boilers and replace two chillers - \$50K energy savings per year
- Utilities management, Managed scheduling of work to reduce costs - \$15K
- Redundancy of software; Reduce redundant software across campus to increase efficiencies and reduce duplication costs - \$25K
- Faculty Loading enhancements; Initiated previously, but producing ongoing annual savings - \$250K
- DocuSign; Online document processing – saving both staff time and document processing costs - \$2.5K
- Invoice Purchasing Card; Invoice payment via P-Card, increasing rebate, cash flow improvements - \$10K
- Auxiliary Assessment; Operational analysis of admin surcharge to auxiliary operations - \$50K
- Validated deferred maintenance appropriation - \$2M / yr
- 5% Services and Supplies cut; all VPs budgets reduced - \$.5M recurring
- Professional development restrictions; Facilities – Dues and Memberships \$44K (60% Reduction)
- Facilities – leverage Paulien 10-year strategic capital plan, data and process; reduce SOU master plan - \$100K
- IT studied failure rate for PC and laptops. Reduced warranty for Dell desktops from four years to one year - \$41K
 - For leased computers, negotiated return-shipping directly with FedEx as opposed to allowing lessor to provide shipping.
 - Studying life expectancy of data-center computing (servers). Have extended the useful life by one additional year.
- Scantron – reduced reliance; Moving toward Akindi for more streamlined processes; future savings (unknown level at this time)

Sample Process Improvement initiatives (to drive efficiencies or reduce waste)

- Comprehensive review of Business Services policies and procedures - TBD
- Streamline internal communication in shared services, develop alternative to event announcing, etc. - \$15K
- Managed onboarding; Expedite onboarding for faster integration - \$10K
- Payroll processing initiative – TBD

Note: corrective actions can lead to process improvement but are tracked separately by Internal Audit

Tuition Advisory Council Update

(from March 2019 FAC)

Greg Perkinson

Tuition and State Support:

Current Budget Reduction Matrix

Cost reduction required to retain 10% Operating Revenue (to Ending Fund Balance)

	Approximate Resident Undergraduate Tuition Increase**					
Biennial Increase to PUSF*	0%	3%	5%	Requires HECC Approval		
				9%	14%	18%
\$0	\$8.3M	\$7.3M	\$6.6M	\$5.3M	\$3.6M	\$2.2M
\$40 million	\$6.9M	\$5.9M	\$5.2M	\$3.9M	\$2.2M	\$.8M
\$80 million	\$5.2M	\$4.2M	\$3.4M	\$0		
\$120 million	\$4M	\$3M	\$2.3M	\$0		
\$186 million	\$3M	\$2M	\$0			

Estimated Remissions Budget	\$3.7M	\$3.7M	\$4M	\$4.5M	\$4.8M	N/A
Innovation & Student Success Investments***	\$2.85M	\$2.85M	\$2.85M	\$2.85M	\$2.85M	N/A

* Assumes restoration of Engineering Technology Sustaining Funds (ETSF) and Sports Lottery

** Assumes 5% increase for Non-Residents and Graduate tuition rates with the exception of the 0% scenario which assumes no increase to any rates

*** Relies on Investment funding (associated with \$186M biennial increase)

Tuition Increase Scenarios

(From April 2019 TAC Meeting)

Sample Tuition Scenarios for Discussion



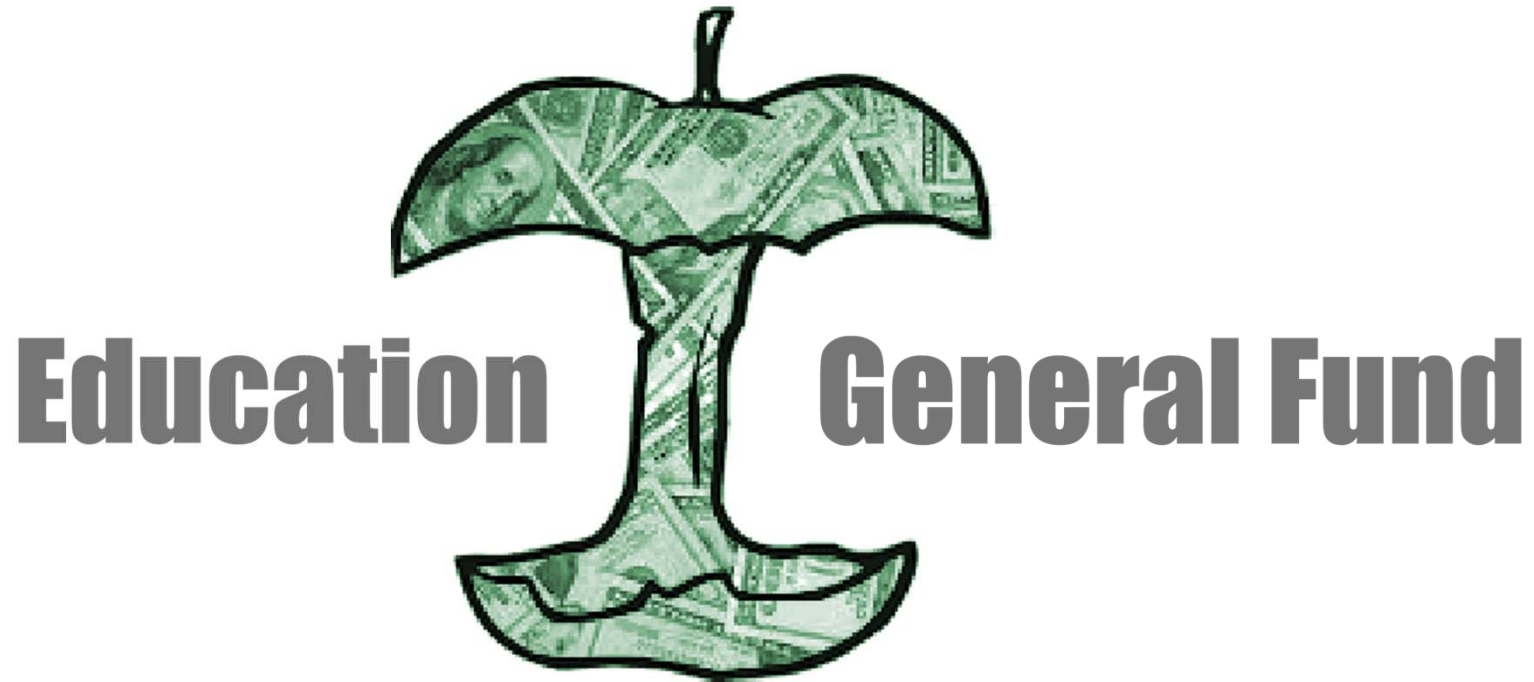
Criterion	Pessimistic	Most Likely	Optimistic
State Funding	\$40M (no Lottery)	\$40M (with ETSF and Lottery)	\$80M
Enrollment	-2%	-1%	+1%
Budget Savings / Cuts	\$2M (25% S&S, 75% Labor)	\$1M (25% S&S, 75% Labor)	\$2M (25% S&S, 75% Labor)
SOU Aid (10% of revenue)	\$4M	\$4.2M	\$4.5M
Investment (examples)	Minimal	Maintain access / pipeline	Hire add'l career services Increase pipeline Restore TxT Faculty
Cost Reduction (examples)	Reduce SOU Aid; Austere S&S, reduce _#_ positions	Only fund essential S&S; Hold _#_ vacant positions open (qualify service level)	Increase SOU Aid \$ x; Hold S&S to 2019 levels, Approve filling x# vacant positions
Tuition Rate Increase (%) (\$ / Credit; \$ / Term; \$ / AY)			
Ending Fund Balance % of Operating Revenue	\$ __ M __%	\$ __ M __%	\$ __ M __%

Student Fee Status Update

(From April meeting)

- ✓ Incidental Fee: ASSOU student body president Alexis Phillips proposed to President Schott a fee increase of 4.25% = \$360 per term.
- ✓ Building Fee: This fee has been at \$45/term at 12 credits for quite some time; propose increase of \$15 to cover IT infrastructure risk = \$60/term
- ✓ Rec Center: locked at \$95 until 3 years after the center opened.
- ✓ Health Center: currently \$140/term. They propose a 2.1% increase to = \$143/term
- ✓ Housing:
 - Room rate: Increasing 2.99% to \$2,900/term (Shasta Double)
 - Meal rate: DECREASING -2.71% to \$1,865/term (Red Plan)
 - NEW “Cost Saver” Meal Plan: \$1,250/term

Information on Cost Drivers for FY20



Cost Drivers

(from Open Forum Presentations)

Cost Driver	Projected FY20 Cost	Notes
Faculty, Staff and Admin Salary & Wages	\$984,000	For employees paid with E&G funds only
Medical Costs	\$372,000	Assumed annual increase of 5% Positive note: Current FY19 experienced NO Growth primarily due to employees opting for less expensive plan
Retirement Costs	\$629,000	Based on new PERS rates releases by PERS board in Fall 2018
Institutional Expenses	\$288,000	Increases to utilities, insurance, debt for buildings, assessments and leases
Minimum Wage Increases	\$74,000	Increases per State of Oregon to \$11.25/hr
Total Projected FY20 Cost		\$2.35 million
Increases @ GRB \$0:		

Cost Driver	FY19 Base	FY20 Cost Increase	FY20 % Increase
Faculty, Staff and Admin Salary & Wages	\$33,203,000	\$984,000	2.9%
Medical Costs	\$7,454,000	\$372,710	5.0%
Retirement Costs	\$7,608,000	\$629,000	8.3%
Institutional Expenses	\$10,849,000	\$288,000	2.7%
Minimum Wage Increases	\$1,576,000	\$74,070	4.7%
Totals:	\$60.7M	\$2.35M	3.87%

Budget Challenge	Cost
FY 19 Projected Deficit	\$2.5M (note: clawed-back \$2M)
FY 20 Cost Drivers	\$2.35M
Ways and Means (increase from GRB)	<u>(\$.6M)</u>
Total Budget Hole to Fill	\$4.25M (note: GRB allocation was negative)



Regular Review of Pro Forma and Possible Scenarios Related to Budget and Tuition Setting

(Sample from Feb 2019 FAC meeting)

Key Assumptions in Pro Forma Analysis

(From Feb 2019 FAC Meeting)



1. Labor increases are projected based on current agreements
2. State funding is a key variable (considered for each scenario)
3. Revenue projections based on winter term's 5th week data (projecting -4% enrollment for current AY)
4. Known increases to PERS/ORP included in OPE for 19-21 biennium
5. PEBB cost held firm this year; normally, annual 5% increase
6. Baseline projected tuition increase is 5%

Current Year of Execution



	2017-19 Biennium			2019-21 Biennium	
	2017-18	2018-19	2018-19	2019-20	2020-21
Education and General (in thousands of dollars)	Actual (000's)	Adopted Budget (000's)	FORECAST (000's)	FORECAST (000's)	FORECAST (000's)
Revenue					
State Appropriations: SSCM	20,840	21,150	21,270	20,436	21,302
State Appropriations: ETIC/SELP	433	428	381	179	179
Total State Funding	21,273	21,578	21,683	20,615	21,482
Tuition	37,759	42,701	37,402	40,532	42,150
Fees	3,244	3,256	3,081	3,268	3,230
SOU Aid	(4,243)	(4,142)	(3,740)	(4,053)	(4,215)
Tuition, net of SOU Aid	36,760	41,814	36,742	39,747	41,164
Misc. Other Revenue	2,811	2,100	2,100	2,243	2,247
Total Revenues	60,844	65,491	60,525	62,605	64,894
Personnel Services					
Faculty	(15,044)	(15,660)	(15,690)	(16,009)	(16,334)
Admin	(8,854)	(9,364)	(9,230)	(9,450)	(9,723)
Classified	(6,436)	(6,665)	(6,582)	(6,970)	(7,082)
Student (& Other)	(1,430)	(1,576)	(1,578)	(1,650)	(1,760)
Labor	(31,763)	(33,265)	(33,081)	(34,079)	(34,900)
Retirement (PERS + ORP)	(6,841)	(7,611)	(7,021)	(8,472)	(8,676)
PEBB	(7,332)	(7,454)	(7,342)	(7,827)	(8,218)
Other	(2,839)	(3,397)	(2,978)	(3,480)	(3,564)
OPE	(17,012)	(18,463)	(17,341)	(19,779)	(20,458)
Net Personnel	(48,775)	(51,728)	(50,422)	(53,858)	(55,358)
Total Supplies and Services	(9,287)	(10,892)	(10,841)	(11,137)	(11,388)
Total Expenditures	(58,062)	(62,620)	(61,263)	(64,995)	(66,746)
Net from Operations Before Transfers	2,782	2,872	(738)	(2,390)	(1,852)
Net Transfers	(2,481)	(2,591)	(1,661)	(2,654)	(2,728)
Change in Fund Balance	301	281	(2,399)	(5,044)	(4,580)
Beginning Fund Balance	6,844	7,138	7,138	4,739	(305)
Ending Fund Balance	7,145	7,419	4,739	(305)	(4,886)
% Operating Revenues	11.7%	11.3%	7.8%	-0.5%	-7.5%

Most Likely

Education and General

(in thousands of dollars)

	2017-19 Biennium			2019-21 Biennium	
	2017-18 Actual (000's)	2018-19 Adopted Budget (000's)	2018-19 FORECAST (000's)	2019-20 FORECAST (000's)	2020-21 FORECAST (000's)
Revenue					
State Appropriations: SSCM	20,840	21,150	21,270	21,598	22,473
State Appropriations: ETIC/SELP	433	428	381	428	381
Total State Funding	21,273	21,578	21,683	22,026	22,854
Tuition	37,759	42,701	37,402	41,342	42,150
Fees	3,244	3,256	3,081	3,334	3,230
SOU Aid	(4,243)	(4,142)	(3,740)	(4,134)	(4,215)
Tuition, net of SOU Aid	36,760	41,814	36,742	40,542	41,164
Misc. Other Revenue	2,811	2,100	2,100	2,243	2,247
Total Revenues	60,844	65,491	60,525	64,810	66,266
Personnel Services					
Faculty	(15,044)	(15,660)	(15,690)	(16,009)	(16,334)
Admin	(8,854)	(9,364)	(9,230)	(9,450)	(9,723)
Classified	(6,436)	(6,665)	(6,582)	(6,970)	(7,082)
Student (& Other)	(1,430)	(1,576)	(1,578)	(1,650)	(1,760)
Labor	(31,763)	(33,265)	(33,081)	(34,079)	(34,900)
Retirement (PERS + ORP)	(6,841)	(7,611)	(7,021)	(8,472)	(8,676)
PEBB	(7,332)	(7,454)	(7,342)	(7,827)	(8,218)
Other	(2,839)	(3,397)	(2,978)	(3,480)	(3,564)
OPE	(17,012)	(18,463)	(17,341)	(19,779)	(20,458)
Net Personnel	(48,775)	(51,728)	(50,422)	(53,858)	(55,358)
Total Supplies and Services	(9,287)	(10,892)	(10,841)	(11,137)	(11,388)
Total Expenditures	(58,062)	(62,620)	(61,263)	(64,995)	(66,746)
Net from Operations Before Transfers	2,782	2,872	(738)	(185)	(480)
Net Transfers	(2,481)	(2,591)	(1,661)	(2,654)	(2,728)
Change in Fund Balance	301	281	(2,399)	(2,839)	(3,208)
Beginning Fund Balance	6,844	7,138	7,138	4,739	1,900
Ending Fund Balance	7,145	7,419	4,739	1,900	(1,308)
% Operating Revenues	11.7%	11.3%	7.8%	2.9%	-2.0%



Most Optimistic

Education and General

(in thousands of dollars)

Revenue

State Appropriations: SSCM

State Appropriations: ETIC/SELP

Total State Funding

Tuition

Fees

SOU Aid

Tuition, net of SOU Aid

Misc. Other Revenue

Total Revenues

Personnel Services

Faculty

Admin

Classified

Student (& Other)

Labor

Retirement (PERS + ORP)

PEBB

Other

OPE

Net Personnel

Total Supplies and Services

Total Expenditures

Net from Operations Before Transfers

Net Transfers

Change in Fund Balance

Beginning Fund Balance

Ending Fund Balance

% Operating Revenues

	2017-19 Biennium			2019-21 Biennium	
	2017-18 Actual (000's)	2018-19 Adopted Budget (000's)	2018-19 FORECAST (000's)	2019-20 FORECAST (000's)	2020-21 FORECAST (000's)
Revenue					
State Appropriations: SSCM	20,840	21,150	21,270	21,598	22,473
State Appropriations: ETIC/SELP	433	428	381	428	381
Total State Funding	21,273	21,578	21,683	22,026	22,854
Tuition	37,759	42,701	37,402	42,558	42,150
Fees	3,244	3,256	3,081	3,432	3,230
SOU Aid	(4,243)	(4,142)	(3,740)	(4,256)	(4,215)
Tuition, net of SOU Aid	36,760	41,814	36,742	41,734	41,164
Misc. Other Revenue	2,811	2,100	2,100	2,243	2,247
Total Revenues	60,844	65,491	60,525	66,003	66,266
Personnel Services					
Faculty	(15,044)	(15,660)	(15,690)	(16,009)	(16,334)
Admin	(8,854)	(9,364)	(9,230)	(9,450)	(9,723)
Classified	(6,436)	(6,665)	(6,582)	(6,970)	(7,082)
Student (& Other)	(1,430)	(1,576)	(1,578)	(1,650)	(1,760)
Labor	(31,763)	(33,265)	(33,081)	(34,079)	(34,900)
Retirement (PERS + ORP)	(6,841)	(7,611)	(7,021)	(8,472)	(8,676)
PEBB	(7,332)	(7,454)	(7,342)	(7,827)	(8,218)
Other	(2,839)	(3,397)	(2,978)	(3,480)	(3,564)
OPE	(17,012)	(18,463)	(17,341)	(19,779)	(20,458)
Net Personnel	(48,775)	(51,728)	(50,422)	(53,858)	(55,358)
Total Supplies and Services	(9,287)	(10,892)	(10,841)	(11,137)	(11,388)
Total Expenditures	(58,062)	(62,620)	(61,263)	(64,995)	(66,746)
Net from Operations Before Transfers	2,782	2,872	(738)	1,008	(480)
Net Transfers	(2,481)	(2,591)	(1,661)	(2,654)	(2,728)
Change in Fund Balance	301	281	(2,399)	(1,647)	(3,208)
Beginning Fund Balance	6,844	7,138	7,138	4,739	3,092
Ending Fund Balance	7,145	7,419	4,739	3,092	(116)
% Operating Revenues	11.7%	11.3%	7.8%	4.7%	-0.2%



Regular Review of Pro Forma and Possible Scenarios Related to Budget and Tuition-setting

- Sample from Feb 2019 FAC meeting
- Most recent example from May 1st TAC meeting
 - Six scenarios were presented
 - As well as an update to the Pro Forma (adding ‘sliders’)

Scenario 0 Goal: No Tuition Increase, 10% Op Rev



Assumptions

PUSF: \$40.5M

Spending Cuts: \$6.95M

SOU Aid: \$3.87M

Enrollment: 0%

Tuition Outcomes

Resident: +0%

Non-Resident: +0%

SOU Aid: 10%

	2017-19 Biennium			2019-21 Biennium	
	2017-18 Actual (000's)	2018-19 Adopted Budget (000's)	2018-19 FORECAST (000's)	2019-20 FORECAST (000's)	2020-21 FORECAST (000's)
Education and General (in thousands of dollars)					
Revenue					
Total State Funding	21,273	21,578	21,683	22,026	22,854
Tuition	37,759	42,701	37,624	38,720	40,629
Fees	3,244	3,256	3,572	3,785	4,017
SOU Aid	(4,243)	(4,142)	(3,762)	(3,872)	(4,063)
Tuition, net of SOU Aid	36,760	41,814	37,434	38,633	40,583
Misc. Other Revenue	2,811	2,100	2,100	2,243	2,247
Total Revenues	60,844	65,491	61,216	62,902	65,684
Personnel Services					
Faculty	(15,044)	(15,660)	(15,849)	(16,272)	(16,624)
Admin	(8,854)	(9,364)	(9,315)	(9,709)	(9,856)
Classified	(6,436)	(6,665)	(6,535)	(6,638)	(6,739)
Student (& Other)	(1,430)	(1,576)	(1,551)	(1,650)	(1,760)
Labor	(31,763)	(33,265)	(33,250)	(34,268)	(34,981)
Retirement (PERS + ORP)	(6,841)	(7,611)	(6,970)	(8,962)	(9,148)
PEBB	(7,332)	(7,454)	(7,316)	(7,827)	(8,218)
Other	(2,839)	(3,397)	(2,957)	(3,499)	(3,572)
OPE	(17,012)	(18,463)	(17,243)	(20,289)	(20,939)
Net Personnel	(48,775)	(51,728)	(50,493)	(54,557)	(55,920)
Supplies & Services	(9,287)	(10,892)	(12,164)	(11,137)	(11,388)
Other adjustments to S&S		0	746	6,950	
Total Supplies and Services	(9,287)	(10,892)	(11,418)	(4,187)	(11,388)
Total Expenditures	(58,062)	(62,620)	(61,911)	(58,744)	(67,307)
Net from Operations Before Transfers	2,782	2,872	(695)	4,158	(1,623)
Net Transfers	(2,481)	(2,591)	(1,661)	(2,669)	(2,736)
Change in Fund Balance	301	281	(2,356)	1,489	(4,358)
Beginning Fund Balance	6,844	7,138	7,145	4,789	6,278
Ending Fund Balance	7,145	7,419	4,789	6,278	1,920
% Operating Revenues	11.7%	11.3%	7.8%	10.0%	2.9%

Scenario 1 Goal: Op Revenue \geq 8%

Assumptions

PUSF: \$40.5M

Spending Cuts: \$1M

SOU Aid: \$4.44M

Enrollment: 0%

Tuition Outcomes

Resident: +16%

Non-Resident: +5%

SOU Aid: 10%

	2017-19 Biennium			2019-21 Biennium	
	2017-18	2018-19	2018-19	2019-20	2020-21
	Actual	Adopted Budget	FORECAST	FORECAST	FORECAST
	(000's)	(000's)	(000's)	(000's)	(000's)
Education and General					
(in thousands of dollars)					
Revenue					
Total State Funding	21,273	21,578	21,683	22,026	22,854
Tuition	37,759	42,701	37,624	44,454	46,548
Fees	3,244	3,256	3,572	3,785	4,017
SOU Aid	(4,243)	(4,142)	(3,762)	(4,445)	(4,655)
Tuition, net of SOU Aid	36,760	41,814	37,434	43,794	45,910
Misc. Other Revenue	2,811	2,100	2,100	2,243	2,247
Total Revenues	60,844	65,491	61,216	68,062	71,012
Personnel Services					
Faculty	(15,044)	(15,660)	(15,849)	(16,272)	(16,624)
Admin	(8,854)	(9,364)	(9,315)	(9,709)	(9,856)
Classified	(6,436)	(6,665)	(6,535)	(6,638)	(6,739)
Student (& Other)	(1,430)	(1,576)	(1,551)	(1,650)	(1,760)
Labor	(31,763)	(33,265)	(33,250)	(34,268)	(34,981)
Retirement (PERS + ORP)	(6,841)	(7,611)	(6,970)	(8,962)	(9,148)
PEBB	(7,332)	(7,454)	(7,316)	(7,827)	(8,218)
Other	(2,839)	(3,397)	(2,957)	(3,499)	(3,572)
OPE	(17,012)	(18,463)	(17,243)	(20,289)	(20,939)
Net Personnel	(48,775)	(51,728)	(50,493)	(54,557)	(55,920)
Supplies & Services	(9,287)	(10,892)	(12,164)	(11,137)	(11,388)
Adjustments to S&S and/or Labor		0	746	1,000	
Total Supplies and Services	(9,287)	(10,892)	(11,418)	(10,137)	(11,388)
Total Expenditures	(58,062)	(62,620)	(61,911)	(64,694)	(67,307)
Net from Operations Before Transfers	2,782	2,872	(695)	3,369	3,705
Net Transfers	(2,481)	(2,591)	(1,661)	(2,669)	(2,736)
Change in Fund Balance	301	281	(2,356)	700	969
Beginning Fund Balance	6,844	7,138	7,145	4,789	5,489
Ending Fund Balance	7,145	7,419	4,789	5,489	6,458
% Operating Revenues	11.7%	11.3%	7.8%	8.1%	9.1%

Scenario 1 Goal: Op Revenue \geq 8%



Raw enrollment projection based on history Plus Levers				FY20			
	2018-19	2019-20	2020-21				
Undergraduate Tuition Rate per SCH	4.22%	Res: 16.0% Non-Res: 5.0%	Res: 5.0% Non-Res: 5.0%	Difference Per SCH	Difference Per Term @ 15 SCH	Difference Per AY @ 45 SCH	Annual Tuition Cost
01-WUE SCH	258.00	300.00	315.00	42	630	1,890	13,500
02-UG Resident SCH (incl. EXRES)	172.00	200.00	210.00	28	420	1,260	9,000
02.2-UG JackJo Pledge	115.00	133.00	140.00	18	270	810	5,985
03-UG Non Resident SCH	526.00	552.00	580.00	26	390	1,170	24,840
04.1-UG Online SCH RES	172.00	200.00	210.00	28	420	1,260	9,000
04.2-UG Online SCH NON-RES	172.00	200.00	210.00	28	420	1,260	9,000
04.3-UG Online SCH WUE	172.00	200.00	210.00	28	420	1,260	9,000
Avg UG Rate:	226.71	255.00	267.86	28	424	1,273	
Graduate Tuition Rate per SCH	2.14%	Res: 16.0% Non-Res: 5.0%	Res: 5.0% Non-Res: 5.0%	Difference Per SCH	Difference Per Term @ 12 SCH	Difference Per AY @ 36 SCH	Annual Tuition Cost
05-GR Resident SCH (incl. EXRES)	430.00	499.00	524.00	69	828	2,484	17,964
06-GR Non Resident SCH	538.00	565.00	593.00	27	324	972	20,340
07.0-GR AP MBA Online SCH	430.00	499.00	524.00	69	828	2,484	17,964
07.1-GR Online SCH RES	430.00	499.00	524.00	69	828	2,484	17,964
07.2-GR Online SCH NON-RES	430.00	499.00	524.00	69	828	2,484	17,964
07.3-GR AP M.Ed Online SCH	369.00	428.00	449.00	59	708	2,124	15,408
08-GR - MEDU SCH	369.00	428.00	449.00	59	708	2,124	15,408
Avg GR Rate:	428.00	488.14	512.43	60	722	2,165	17,573
Other Categories Tuition Rate per SCH	1.00%	5.00%	5.00%				
09-Staff	51.00	60.00	63.00	9	135	405	2,700
10-Waived Tuition SCH	-	-	-	-	-	-	-
11-Course Based Tuition SCH (excl. On-Line, ASC, EE, STAFF/Co-Pay)	101.00	106.00	111.00	5	75	225	4,770
12-Adv Southern Credit SCH	45.00	47.00	49.00	2	30	90	2,115
13-Early Entry Credit SCH	167.00	175.00	184.00	8	120	360	7,875

Demographic Changes and Long-term Outlook for Enrollment

State Profile Pg 1 Overall Pg 1 Public Race/Eth Pg 1 Private Schools

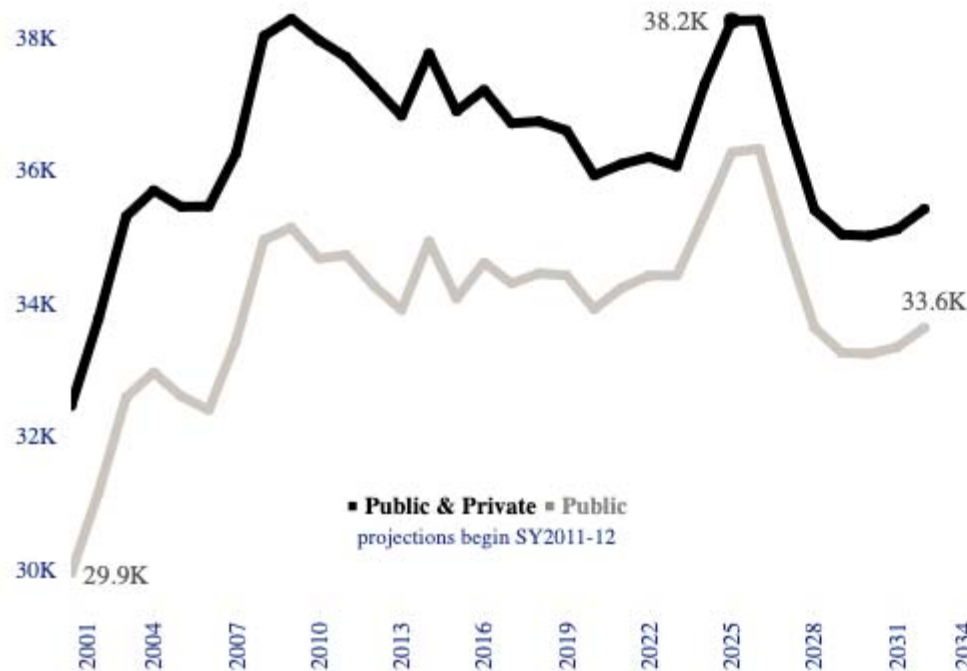
State Profile for
Oregon

Oregon



KNOCKING
AT THE COLLEGE DOOR

Overall High School Graduate Trends



- 36,500 high school graduates, on average, projected per year between school years 2011-12 and 2031-32.

- The total number of graduates is projected to increase by 2.7% between 2011-12 and 2025-26, the next highest year for Oregon.

- Oregon generates about 4.5% of the West's total, on average



SOU's Unique Situation

- Past retrenchments and major budget reductions, including personnel
- Continual, ongoing cost control
- Funding model and how it has not given SOU CSL
Emphasize that we HAVE improved our outcomes but the “true-up” we receive for doing so is minimal

Retrenchment and Major Budget Reductions Including Personnel

(From SOU-HECC Conditions Report)

Appendix II. – Retrenchment Savings Analysis

Southern Oregon University Final Retrenchment Plan: Projected targets vs. Achieved results

Retrenchment Reduction Distribution

	FY14		FY15		FY16		FY17		FY18		Total		FTE		Notes
	Target	Achieved	Target	Achieved	Target	Achieved	Target	Achieved	Target	Achieved	Target	Achieved	Target	Achieved	
One-Time Savings															
Fund Transfers	3,000,000	2,506,093	3,200,000	2,424,616	-	1,700,000	-	-	-	-	6,200,000	6,630,709			
Faculty Furlough Days	-	-	253,000	273,638	-	-	-	-	-	-	253,000	273,638			
Annual Assessment Savings (Aux and Des Ops)	-	-	300,000	268,176	300,000	376,249	300,000	323,589	300,000	411,061	1,200,000	1,379,076			(1)
Administrator Furlough Days	94,000	250,935	94,000	137,114	-	-	-	-	-	-	188,000	388,050			
Total One-Time Savings	3,094,000	2,757,028	3,847,000	3,103,544	300,000	2,076,249	300,000	323,589	300,000	411,061	7,841,000	8,671,472			
Permanent Savings															
Academic Reorganization	227,000	1,361,949	854,000	139,228	-	-	-	-	-	-	1,081,000	1,501,177	19.25	16.25	(2)
Assumed Retirements	-	-	-	-	316,000	162,541	316,000	224,823	316,000	480,996	948,000	868,360	10.00	8.00	(3)
Term-by-term Adjuncts	-	-	100,000	324,003	-	-	-	-	-	-	100,000	324,003	3.31	12.00	(4)
Undergraduate Studies	-	-	-	-	124,000	121,415	152,000	76,335	-	-	276,000	197,751	4.00	2.67	(5)
Business, Communication, & the Environment	-	135,185	160,000	181,407	145,000	253,205	46,000	85,991	75,000	48,954	426,000	704,743	5.45	6.55	(5)
Education & Health	-	-	244,000	433,622	228,000	408,447	174,000	62,625	111,000	-	757,000	904,695	9.16	9.16	(5)
Science, Technology, Engineering, & Math	-	84,394	278,000	416,955	430,000	241,863	161,000	329,267	37,000	40,327	906,000	1,112,806	9.39	10.17	(5)
Center for the Arts	-	30,560	122,000	155,967	160,000	183,259	68,000	79,368	68,000	16,102	418,000	465,256	5.28	4.95	(5)
Language and Culture	-	28,480	14,000	57,171	96,000	191,428	198,000	281,779	53,000	46,554	361,000	605,411	3.66	5.10	(5)
Social Sciences & Public Affairs	-	345,594	230,000	249,555	475,000	217,780	151,000	211,238	36,000	80,970	892,000	1,105,137	10.68	9.56	(5)
Total Permanent Incremental Savings	227,000	1,986,162	2,002,000	1,957,908	1,974,000	1,779,939	1,266,000	1,351,426	696,000	713,904	6,165,000	7,789,339	80.18	84.41	
Total Cumulative Permanent Savings	227,000	1,986,162	2,229,000	3,944,071	4,203,000	5,724,009	5,469,000	7,075,436	6,165,000	7,789,339	6,165,000	7,789,339			
Total One-Time + Ongoing (Permanent) savings	3,321,000	4,743,191	6,076,000	7,047,615	4,503,000	7,800,259	5,769,000	7,399,025	6,465,000	8,200,400	14,006,000	16,460,811			
												16,557,634	18%		(5)

Notes

- (1) Annual assessment for Auxiliary and designated operations was increased from 7% to 10% to better reflect true costs of general support within Education and General (E&G). This increased assessment is ongoing.
- (2) FTE reductions experienced through Classified and Administrative position eliminations and faculty reduction through non-backfill of new academic directors.
Additional savings from better budgetary oversight resulting in reduced spending for program direct support costs.
- (3) Assumed retirements were projected at 10, however, due to enrollment beyond projections, actual retrenched retirements was not achieved, however, ongoing resource management tactics continue to achieve efficiencies and savings
- (4) Despite enrollment growth between 2013-14 and 2014-15, due to better loading and efficient use of faculty assets, Term By Term faculty use was decreased.
- (5) While outcomes were projected only through FY18, per the original plan, due to enrollment and required teach outs, the full retrenchment plan now continues through FY20, with an additional 0.77 FTE and \$62K yet to be realized.

Funding Model Has Not Provided SOU with Current Service Level (CSL)

- Two-part SSCM review process with Full Board:
 - Overview of the Model: High-level charts in Oct 2018 meeting (next three slides)
 - Deeper dive in January 2019
- Periodic updates provided to F&A Committee and Board
 - Example, April HECC W&M slide

SSCM Learning Road Map

(From Oct 2018 Board of Trustees meeting)

- Overview (Higher Education Coordinating Commission (HECC) presentation)
 - High-level overview and current Fiscal Year (FY) 18-19 True-up Allocation (this session)
 - Deeper dive on why model limits SOU (January 2019)
- References:
<https://www.oregon.gov/highered/institutions-programs/public/Pages/university-funding-model-technical-resources.aspx>

SOU SSCM Quarterly Distribution



FY 19 SOU DISTRIBUTION SCHEDULE					
	Q5: July	Q6: October	Q7: January	Q8: April	Total
Public University Support Fund	\$7,587,680	\$5,174,425	\$5,104,842	\$3,403,228	\$21,270,175
Public University State Programs	\$0	\$120,955	\$48,382	\$32,255	\$201,592
Statewide Public Services Programs	\$0	\$0	\$0	\$0	\$0
Targeted and One-time Appropriations	\$0	\$0	\$0	\$0	\$0
Other	\$158,945	\$158,945	\$158,945	\$158,945	\$635,780
TOTAL	\$7,746,625	\$5,454,325	\$5,312,169	\$3,594,428	\$22,107,547

Summary of True-up by Institution

(note: outcomes improved, True-up: \$193K)

Summary

SSCM FY19 FUNDING ALLOCATION TRUE UP SUMMARY											
		EOU	OIT	OSU	OSU-Cascades	OSU Total	PSU	SOU	UO	WOU	Total
Mission Differentiation (MD)	Projection	\$ 11,377,913	\$ 13,216,585	\$ 14,480,650	\$ 2,759,692	\$ 17,240,342	\$ 4,225,726	\$ 8,467,111	\$ 4,354,801	\$ 7,037,742	\$ 65,920,220
	Trued Up	\$ 11,526,745	\$ 13,444,968	\$ 14,658,684	\$ 2,786,701	\$ 17,445,385	\$ 4,226,711	\$ 8,578,487	\$ 4,409,270	\$ 7,252,656	\$ 66,884,222
	Difference from Projection	\$ 148,832	\$ 228,383	\$ 178,034	\$ 27,009	\$ 205,043	\$ 985	\$ 111,376	\$ 54,469	\$ 214,914	\$ 964,002
		1.31%	1.73%	1.23%	0.98%	1.19%	0.02%	1.32%	1.25%	3.05%	1.46%
Activity Based (SCH)	Projection	\$ 3,278,452	\$ 5,488,580	\$ 41,366,995	\$ 1,340,401	\$ 42,707,395	\$ 33,503,680	\$ 4,995,535	\$ 26,755,592	\$ 7,229,989	\$ 123,959,223
	Trued Up	\$ 3,251,051	\$ 5,456,682	\$ 41,252,970	\$ 1,374,800	\$ 42,627,771	\$ 33,369,379	\$ 5,062,098	\$ 26,635,850	\$ 7,170,788	\$ 123,573,619
	Difference from Projection	\$ (27,401)	\$ (31,898)	\$ (114,025)	\$ 34,399	\$ (79,624)	\$ (134,301)	\$ 66,563	\$ (119,742)	\$ (59,201)	\$ (385,604)
		-0.84%	-0.58%	-0.28%	2.57%	-0.19%	-0.40%	1.33%		-0.82%	-0.31%
Outcomes Based (OBF)	Projection	\$ 5,703,344	\$ 8,708,572	\$ 58,172,662	\$ 3,078,481	\$ 61,251,144	\$ 53,647,206	\$ 7,614,242	\$ 38,958,741	\$ 10,055,584	\$ 185,938,833
	Trued Up	\$ 5,408,929	\$ 8,553,656	\$ 58,499,830	\$ 3,178,906	\$ 61,678,735	\$ 53,794,088	\$ 7,629,591	\$ 38,045,868	\$ 10,249,568	\$ 185,360,435
	Difference from Projection	\$ (294,415)	\$ (154,916)	\$ 327,168	\$ 100,425	\$ 427,591	\$ 146,882	\$ 15,349	\$ (912,873)	\$ 193,984	\$ (578,398)
		-5.16%	-1.78%	0.56%	3.26%	0.70%	0.27%	0.20%	-2.34%	1.93%	-0.31%
Pre-Stop Loss (MD + SCH + OBF)	Projection	\$ 20,359,709	\$ 27,413,737	\$ 114,020,307	\$ 7,178,574	\$ 121,198,880	\$ 91,376,612	\$ 21,076,888	\$ 70,069,134	\$ 24,323,315	\$ 375,818,275
	Trued Up	\$ 20,186,724	\$ 27,455,305	\$ 114,411,484	\$ 7,340,407	\$ 121,751,890	\$ 91,390,177	\$ 21,270,175	\$ 69,090,988	\$ 24,673,012	\$ 375,818,271
	Difference from Projection	\$ (172,984)	\$ 41,569	\$ 391,177	\$ 161,833	\$ 553,010	\$ 13,566	\$ 193,288	\$ (978,146)	\$ 349,697	\$ (4)
		-0.85%	0.15%	0.34%	2.25%	0.46%	0.01%	0.92%	-1.40%	1.44%	0.00%
Stop Loss/Stop Gain Adjustment (SL)	Projection	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Trued Up	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Difference from Projection	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		#DIV/0!	#DIV/0!	0.00%	0.00%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Final (MD + SCH + OBF + SL)	Projection	\$ 20,359,710	\$ 27,413,737	\$ 114,020,307	\$ 7,178,574	\$ 121,198,880	\$ 91,376,611	\$ 21,076,887	\$ 70,069,134	\$ 24,323,315	\$ 375,818,274
	Trued Up	\$ 20,186,724	\$ 27,455,305	\$ 114,411,484	\$ 7,340,407	\$ 121,751,890	\$ 91,390,177	\$ 21,270,175	\$ 69,090,987	\$ 24,673,011	\$ 375,818,269
	Difference from Projection	\$ (172,986)	\$ 41,568	\$ 391,177	\$ 161,833	\$ 553,010	\$ 13,566	\$ 193,288	\$ (978,147)	\$ 349,696	\$ (5)
		-0.85%	0.15%	0.34%	2.25%	0.46%	0.01%	0.92%	-1.40%	1.44%	0.00%

2017-19 LAB

2017-19 Legislatively Adopted Budget				
Description	SB 5524	SB 256	HB 5006	Total
Operations (GF)				
Public University Support Fund	\$ 736,898,583	\$ -	\$ -	\$ 736,898,583
Public University State Programs	\$ 39,726,110	\$ 190,000	\$ 1,730,000	\$ 41,646,110
Education & General Subtotal	\$ 776,624,693	\$ 190,000	\$ 1,730,000	\$ 778,544,693
Agricultural Experiment Station	\$ 66,088,861	\$ -	\$ -	\$ 66,088,861
Extension Service	\$ 47,717,403	\$ -	\$ -	\$ 47,717,403
Forest Research Laboratory	\$ 10,224,041	\$ -	\$ -	\$ 10,224,041
Statewide Public Services Subtotal	\$ 124,030,305	\$ -	\$ -	\$ 124,030,305
Subtotal Operations	\$ 900,654,998	\$ 190,000	\$ 1,730,000	\$ 902,574,998
Debt Service	\$ 161,731,988	\$ -	\$ (8,501,533)	\$ 153,230,455
Capital Construction (GF)	\$ -	\$ -	\$ 1,690,000	\$ 1,690,000
Total GF Operations	\$ 1,062,386,986	\$ 190,000	\$ (5,081,533)	\$ 1,057,495,453
Lottery Fund				
Sports Lottery	\$ 8,240,000	\$ -	\$ -	\$ 8,240,000
Outdoor School (Extension Service)	\$ 24,000,000	\$ -	\$ -	\$ 24,000,000
Debt Service	\$ 31,921,630	\$ -	\$ (40,020)	\$ 31,881,610
Total Lottery Fund	\$ 64,161,630	\$ -	\$ (40,020)	\$ 64,121,610
Total General and Lottery Funds	\$ 1,126,548,616	\$ 190,000	\$ (5,121,553)	\$ 1,121,617,063
<i>Debt Service - Combined GF & LF</i>	\$ 193,653,618	\$ -	\$ (8,541,553)	\$ 185,112,065

Outcomes-Based Funding



The PUSF funding formula distributes funds based on graduation rates, service to underrepresented, rural, and first-gen students, and high-demand degrees.

SSCM Allocations at Co-Chair's Budget

Institution	FY18	FY19	2017-19	FY20	FY21	2019-21	Year-to-Year Difference FY20	Year-to-Year Difference FY21	2019-21 Percent Change
EOU	\$19,898,918	\$20,186,726	\$40,085,644	\$19,980,353	\$20,469,682	\$40,450,035	\$(206,373)	\$489,329	0.91%
OIT	\$26,034,493	\$27,455,306	\$53,489,799	\$27,770,186	\$28,791,807	\$56,561,993	\$314,880	\$1,021,621	5.74%
OSU	\$114,798,771	\$121,751,891	\$236,550,662	\$124,519,399	\$130,287,438	\$254,806,837	\$2,767,508	\$5,768,039	7.72%
PSU	\$87,900,756	\$91,390,178	\$179,290,934	\$92,705,699	\$96,741,968	\$189,447,667	\$1,315,521	\$4,036,269	5.66%
SOU	\$20,845,008	\$21,270,176	\$42,115,184	\$21,598,730	\$22,474,079	\$44,072,809	\$328,554	\$875,349	4.65%
UO	\$67,773,522	\$69,090,988	\$136,864,510	\$69,273,894	\$71,289,489	\$140,563,383	\$182,906	\$2,015,595	2.70%
WOU	\$23,828,838	\$24,673,012	\$48,501,850	\$25,091,462	\$26,433,822	\$51,525,284	\$418,450	\$1,342,360	6.23%
Total	\$361,080,306	\$375,818,277	\$736,898,583	\$380,939,723	\$396,488,285	\$777,428,008	\$5,121,446	\$15,548,562	5.50%

Tuition Advisory Council Update from May 8, 2019 Meeting

Road Map for Today

- Review and approval of Minutes
- Where we left off...
 - Assumptions for Baseline Tuition Rate Scenario
 - Remissions study – how SOU Aid increases relative to Tuition rate increases
- Develop recommendation for President
- Vote on recommendation
- Review of HB 4141 checklist

TAC Key Assumptions

- TAC Members agreed that some variation of Scenario 6 presented on 5/1/19 would be needed to achieve a sound tuition recommendation
- Summary of assumptions and design conditions:
 - Keep SOU Aid healthy (to support student success)...baseline is \$3.6M
 - Consider likelihood of +\$80M PUSF funding level (note: members preferred the +\$40M funding scenario)
 - Consider feedback regarding importance of long-term stability: 8% of Operating Revenue (for Ending Fund Balance) is the floor
 - Enrollment projections vary from -1% to flat

A Baseline Scenario

Assumptions

PUSF: \$80M

Spending Cuts: \$1.6M

Enrollment: -0.5%

Tuition Outcomes

Resident: +11.00%

Non-Resident: +5%

	2017-19 Biennium			2019-21 Biennium	
	2017-18	2018-19	2018-19	2019-20	2020-21
Education and General	Actual	Adopted Budget	FORECAST	FORECAST	FORECAST
(in thousands of dollars)	(000's)	(000's)	(000's)	(000's)	(000's)
Revenue					
State Appropriations: SSCM	20,840	21,150	21,270	22,542	23,455
State Appropriations: ETIC/SELP	433	428	381	381	381
One-time Funding			32		
Total State Funding	21,273	21,578	21,683	22,922	23,836
Tuition	37,759	42,701	37,624	42,473	44,776
Fees	3,244	3,256	3,572	3,792	4,025
Raider Aid	(4,243)	(4,142)	(3,762)	(4,116)	(4,478)
Tuition, net of Raider Aid	36,760	41,814	37,434	42,149	44,323
Misc. Other Revenue	2,811	2,100	2,100	2,243	2,247
Total Revenues	60,844	65,491	61,216	67,315	70,407
Personnel Services					
Faculty	(15,044)	(15,660)	(15,849)	(16,272)	(16,624)
Admin	(8,854)	(9,364)	(9,315)	(9,709)	(9,856)
Classified	(6,436)	(6,665)	(6,535)	(6,573)	(6,675)
Student (& Other)	(1,430)	(1,576)	(1,551)	(1,650)	(1,760)
Labor	(31,763)	(33,265)	(33,250)	(34,204)	(34,916)
Retirement (PERS + ORP)	(6,841)	(7,611)	(6,970)	(8,944)	(9,130)
PEBB	(7,332)	(7,454)	(7,316)	(7,827)	(8,218)
Other	(2,839)	(3,397)	(2,957)	(3,493)	(3,566)
OPE	(17,012)	(18,463)	(17,243)	(20,263)	(20,914)
Net Personnel	(48,775)	(51,728)	(50,493)	(54,467)	(55,830)
Supplies & Services	(9,287)	(10,892)	(12,164)	(11,137)	(9,752)
Adjustments to S&S and/or Labor		0	746	1,600	
Total Supplies and Services	(9,287)	(10,892)	(11,418)	(9,537)	(9,752)
Total Expenditures	(58,062)	(62,620)	(61,911)	(64,004)	(65,582)
Net from Operations Before Transf	2,782	2,872	(695)	3,311	4,825
Net Transfers	(2,481)	(2,591)	(1,661)	(2,664)	(2,731)
Change in Fund Balance	301	281	(2,356)	647	2,095
Beginning Fund Balance	6,844	7,138	7,145	4,789	5,436
Ending Fund Balance	7,145	7,419	4,789	5,436	7,530
% Operating Revenues	11.7%	11.3%	7.8%	8.1%	10.7%

Baseline Scenario



Raw enrollment projection based on history Plus Levers

	2018-19	2019-20	2020-21	FY20			
Undergraduate Tuition Rate per SCH	4.22%	Res: 11.0% Non-Res: 5.0%	Res: 5.0% Non-Res: 5.0%	Difference Per SCH	Difference Per Term @ 15 SCH	Difference Per AY @ 45 SCH	Annual Tuition Cost
01-WUE SCH	258.00	287.00	302.00	29	435	1,305	12,915
02-UG Resident SCH (incl. EXRES)	172.00	191.00	201.00	19	285	855	8,595
02.2-UG JackJo Pledge	115.00	128.00	134.00	13	195	585	5,760
03-UG Non Resident SCH	526.00	552.00	580.00	26	390	1,170	24,840
04.1-UG Online SCH RES	172.00	191.00	201.00	19	285	855	8,595
04.2-UG Online SCH NON-RES	172.00	191.00	201.00	19	285	855	8,595
04.3-UG Online SCH WUE	172.00	191.00	201.00	19	285	855	8,595
Avg UG Rate:	226.71	247.29	260.00	21	309	926	
Graduate Tuition Rate per SCH	2.14%	Res: 11.0% Non-Res: 5.0%	Res: 5.0% Non-Res: 5.0%	Difference Per SCH	Difference Per Term @ 12 SCH	Difference Per AY @ 36 SCH	Annual Tuition Cost
05-GR Resident SCH (incl. EXRES)	430.00	477.00	501.00	47	564	1,692	17,172
06-GR Non Resident SCH	538.00	565.00	593.00	27	324	972	20,340
07.0-GR AP MBA Online SCH	430.00	477.00	501.00	47	564	1,692	17,172
07.1-GR Online SCH RES	430.00	477.00	501.00	47	564	1,692	17,172
07.2-GR Online SCH NON-RES	430.00	477.00	501.00	47	564	1,692	17,172
07.3-GR AP M.Ed Online SCH	369.00	410.00	431.00	41	492	1,476	14,760
08-GR - MEDU SCH	369.00	410.00	431.00	41	492	1,476	14,760
Avg GR Rate:	428.00	470.43	494.14	42	509	1,527	16,935
Other Categories Tuition Rate per SCH	1.00%	5.00%	5.00%				
09-Staff	51.00	57.00	60.00	6	90	270	2,565
10-Waived Tuition SCH	-	-	-	-	-	-	-
11-Course Based Tuition SCH (excl. On-Line, ASC, EE, STAFF/Co-Pay)	101.00	106.00	111.00	5	75	225	4,770
12-Adv Southern Credit SCH	45.00	47.00	49.00	2	30	90	2,115
13-Early Entry Credit SCH	167.00	175.00	184.00	8	120	360	7,875

Increase from Baseline Remissions Relative to Tuition

Tuition Change	Remissions \$	Total AY Tuition \$ Change	PUSF 40.5 (Cost Reductions)	PUSF 80 (Cost Reductions)
5%	\$3,98M	\$405/AY	4.2M	3.3M
6%	\$3.99M	\$450/AY	4.0M	3.1M
7%	\$4.02M	\$540/AY	3.6M	2.8M
8%	\$4.05M	\$630/AY	3.3M	2.4M
9%	\$4.06M	\$675/AY	3.1M	2.2M
10%	\$4.09M	\$765/AY	2.8M	1.9M
11%	\$4.11M	\$855/AY	2.4M	1.6M
12%	\$4.14M	\$945/AY	2.1M	1.2M
13%	\$4.16M	\$990/AY	1.9M	1.1M
14%	\$4.18M	\$1080/AY	1.6M	700k
15%	\$4.2M	\$1170/AY	1.3M	400k

TAC Recommendation to President



- Due to current uncertainties, the TAC recommends a tuition rate increase ranging from 11% to 14.5% (with 13.5% as the "sweet spot")
- The Chair of the TAC drafting majority opinion on 5/9/19
- Undergraduate Cost of Attendance chart and analysis follow

DATE: May 10, 2019
TO: Linda Schott, President
FROM: Susan Walsh, Provost
SUBJECT: Tuition Advisory Council Recommendation

Dear President Schott:

Thank you for the opportunity to lead the work of the Tuition Advisory Council (TAC) in setting tuition for AY 19-20. Members of the TAC considered a wide range of critical interests and diverse goals, including the priorities established in the Higher Education Coordinating Commission (HECC) tuition setting criteria resulting from HB 4141. Our goal was to build an inclusive and transparent process, and to achieve consensus on the most appropriate recommendation(s) to make to you and the governing board regarding resident tuition and mandatory enrollment fees for the upcoming academic year.

The TAC voting members consist of two faculty members, two administrators, and four students (two from student government and two from historically underrepresented student populations). The group was assisted in its efforts by numerous nonvoting staff members, including but not limited to the VP for Finance and Administration, VP for Enrollment Management and Student Affairs, and staff members from the offices of Budget, Business Services, and the Registrar.

HB 4141 requires, among other things, transparency. To achieve this goal, the TAC developed a website to serve as a repository for all materials reviewed by the committee, meeting minutes, a communication plan, and HB 4141 checklist used to track our progress. We also created a social media campaign and held open forums at times and locations most likely to reach the greatest number of faculty, staff, and students.

As Chair of the TAC, I can assure you that our members took this work very seriously. Together we have examined a huge amount of data and related information, asked numerous questions, considered many options, and debated about the best path forward – all within the context of keeping any tuition increases as low as possible. While we may have started the process coming from different places, I am pleased to report to you that we are ending our work with unanimous support for the attached recommendation.

Very respectfully,

Sue

SOUTHERN OREGON UNIVERSITY
TUITION ADVISORY COUNCIL UNANIMOUS OPINION AND
TUITION AND FEES RECOMMENDATION
Academic Year 2019-20: Fall 2019 through Summer 2020


Date: May 10th, 2019
To: President Linda Schott
From: Provost Susan Walsh, Chair – Tuition Advisory Council

The purpose of this opinion is to describe the rationale for the TAC's Tuition Rate and Mandatory Fees recommendation. The Tuition Advisory Council decided their recommendation to the President of Southern Oregon University on a vote of all members present, once a quorum was established. As the vote was unanimous, there is no minority opinion.

The TAC recommends Resident undergraduate and graduate tuition should increase at a rate ranging from 11% to 14.5%. Cost reductions associated with each tranche were discussed. Given the uncertainty of Public University Support Fund (PUSF) funding levels, and enrollment, the TAC focused on the assumptions shown on Figure 1; and ran scenarios based on different funding and remissions assumptions. Table 1 shows the Recommended Tuition Rates, based on PUSF allocation levels. The TAC preferred a 13.5% increase, based on: -.5% enrollment; GRB +\$40.5M state funding; and SOU Aid (remissions) increasing \$600K over the current-year baseline. The costs for tuition and fees associated with the 13.5% tuition increase scenario are shown in Figure 2. The motion passed, 6-Y/0-N/0-A.

The TAC actively considered the criteria in HB 4141. Foremost among the criteria was the discussion related to how SOU Aid should be adjusted, based on tuition rate and funding level to support our most vulnerable students (see Figure 3). The TAC members were also very focused on minimizing cost reductions, in order to maintain existing programs and service-levels. In summary, the TAC recommends the President approve tuition rate increases as shown. For a deeper understanding of the dialogue, please see the minutes (<https://sou.edu/president/tuition-advisory-council/>).

Figure 1 – TAC Assumptions and Planning Considerations



TAC Key Assumptions

- TAC Members agreed that some variation of Scenario 6 presented on 5/1/19 would be needed to achieve a sound tuition recommendation
- Summary of assumptions and design conditions:
 - Keep SOU Aid healthy (to support student success)...baseline is \$3.6M
 - Consider likelihood of +\$80M PUSF funding level (note: members preferred the +\$40M funding scenario)
 - Consider feedback regarding importance of long-term stability... 8% of Operating Revenue (of Ending Fund Balance) is the floor
 - Enrollment projections vary from -1% to flat

Table 1: Recommended Resident Undergraduate Tuition Rate per PUSF Allocation Scenario

PUSF	PUSF increase from current biennium	Proposed Undergraduate Tuition Rate per credit	Difference Per Credit	Difference Per Term @ 15 Credits	Difference Per Academic Year @ 45 Credits	% Rate Increase
GRB \$737M	\$0	\$201	\$29	\$435	\$1,305	17.0%
\$757M	+20M	\$198	\$26	\$390	\$1,170	15.0%
\$777.5M	+40.5M	\$195	\$23	\$345	\$1,035	13.5%
\$797M	+60M	\$193	\$21	\$315	\$945	12.0%
\$817M	+80M	\$191	\$19	\$285	\$855	11.0%
\$837M	+100M	\$189	\$17	\$255	\$765	10.0%
\$857M	+120M	\$187	\$15	\$225	\$675	8.5%

Figure 2 – TAC Recommended Rates (preferred option is based on PUSF funding at \$777.5M (13.5%))

Tuition Category	Current Credit Rate Per Term	Current Tuition per Academic Year	Proposed Credit Rate Per Term	Proposed Tuition per Academic Year	Increase \$ per Credit	Increase \$ per Academic Year	Increased %
Resident Undergrad	\$172.00	\$7,740.00	\$195.22	\$8,784.90	\$23.22	\$1,044.90	13.5%
WUE	\$250.00	\$11,250.00	\$283.75	\$12,768.75	\$33.75	\$1,518.75	13.5%
Nonres Undergrad	\$526.00	\$23,670.00	\$552.30	\$24,853.50	\$26.30	\$1,183.50	5.0%
Resident Grad	\$430.00	\$15,480.00	\$488.05	\$17,569.80	\$58.05	\$2,089.80	13.5%
Nonres Grad	\$538.00	\$19,368.00	\$564.90	\$20,336.40	\$26.90	\$968.40	5.0%
Masters - Education	\$369.00	\$13,284.00	\$418.82	\$15,077.52	\$49.82	\$1,793.52	13.5%


Mandatory Fees							
Student Incidental	\$345.00	\$1,035.00	\$360.00	\$1,080.00	\$15.00	\$45.00	4.35%
Student Rec Center	\$95.00	\$285.00	\$95.00	\$285.00	\$0.00	\$0.00	0%
Student Health Services	\$140.00	\$420.00	\$143.00	\$429.00	\$3.00	\$9.00	2.14%
Building Fee	\$45.00	\$135.00	\$60.00	\$180.00	\$15.00	\$45.00	33.33%
Composite Mandatory Fees:	\$625.00	\$1,875.00	\$658.00	\$1,974.00	\$33.00	\$99.00	5.28%

Tuition & Fees Totals							
Resident Undergrad	\$3,205.00	\$9,615.00	\$3,586.30	\$10,758.90	\$56.22	\$1,143.90	12%
WUE	\$4,375.00	\$13,125.00	\$4,914.25	\$14,742.75	\$66.75	\$1,617.75	12%
Nonres Undergrad	\$8,515.00	\$25,545.00	\$8,942.50	\$26,827.50	\$59.30	\$1,282.50	5%
Resident Grad	\$5,785.00	\$17,355.00	\$6,514.60	\$19,543.80	\$91.05	\$2,188.80	13%
Nonres Grad	\$7,081.00	\$21,243.00	\$7,436.80	\$22,310.40	\$59.90	\$1,067.40	5%
Masters - Education	\$5,053.00	\$15,159.00	\$5,683.84	\$17,051.52	\$82.82	\$1,892.52	12%

*For undergraduate students, total annual \$ increase assumes 15 student credit hours per term or 45 per academic year

*For graduate students, total annual \$ increase assumes 12 student credit hours per term or 36 per academic year

Figure 3 – Chart Showing SOU Aid Funding Guidelines



Increase from Baseline Remissions relative to Tuition

Tuition Change	Remissions \$	Total AY Tuition \$ Change	PUSF 40.5 (Cost Reductions)	PUSF 80 (Cost Reductions)
5%	\$3.98M	\$405/AY	4.2M	3.3M
6%	\$3.99M	\$450/AY	4.0M	3.1M
7%	\$4.02M	\$540/AY	3.6M	2.8M
8%	\$4.05M	\$630/AY	3.3M	2.4M
9%	\$4.06M	\$675/AY	3.1M	2.2M
10%	\$4.09M	\$765/AY	2.8M	1.9M
11%	\$4.11M	\$855/AY	2.4M	1.6M
12%	\$4.14M	\$945/AY	2.1M	1.2M
13%	\$4.16M	\$990/AY	1.9M	1.1M
14%	\$4.18M	\$1080/AY	1.6M	700k
15%	\$4.2M	\$1170/AY	1.3M	400k

Undergraduate Cost of Attendance @ 13.5% Increase



Tuition	Current/Term	Curr/AY	Prop/AY	Inc \$/AY	Inc %
Resident Undergrad	\$ 2,580.00	\$ 7,740.00	\$ 8,784.90	\$ 1,044.90	13.5%
Mandatory Fees					
Student Incidental	\$ 345.00	\$ 1,035.00	\$ 1,080.00	\$ 45.00	4.35%
Student Rec Center	\$ 95.00	\$ 285.00	\$ 285.00	\$ -	0.00%
Student Health Services	\$ 140.00	\$ 420.00	\$ 429.00	\$ 9.00	2.14%
Building Fee	\$ 45.00	\$ 135.00	\$ 180.00	\$ 45.00	33.33%
Composite Mandatory Fees:	\$ 625.00	\$ 1,875.00	\$ 1,974.00	\$ 99.00	5.28%
Housing/Meals					
Shasta Double	\$ 2,816.00	\$ 8,448.00	\$ 8,700.00	\$ 252.00	2.98%
Red Plan	\$ 1,917.00	\$ 5,751.00	\$ 5,595.00	\$ (156.00)	-2.71%
Composite Housing/Meals Change:	\$ 4,733.00	\$ 14,199.00	\$ 14,295.00	\$ 96.00	0.68%
Total Cost of Attendance					
Resident Undergrad	\$ 7,938.00	\$ 23,814.00	\$ 25,053.90	\$ 1,239.90	5.21%

Recommendation at +\$40.5M PUSF: 13.5% Tuition Increase



	2018-19	2019-20	FY20		
Undergraduate Tuition Rate per SCH	4.22%	Res: 13.5% Non-Res: 5.0%	Difference Per SCH	Difference Per Term @ 15 SCH	Difference Per AY @ 45 SCH
01-WUE SCH	258.00	293.00	35	525	1,575
02-UG Resident SCH (incl. EXRES)	172.00	195.00	23	345	1,035
02.2-UG JackJo Pledge	115.00	131.00	16	240	720
03-UG Non Resident SCH	526.00	552.00	26	390	1,170
04.1-UG Online SCH RES	172.00	195.00	23	345	1,035
04.2-UG Online SCH NON-RES	172.00	195.00	23	345	1,035
04.3-UG Online SCH WUE	172.00	195.00	23	345	1,035
Graduate Tuition Rate per SCH	2.14%	Res: 13.5% Non-Res: 5.0%	Difference Per SCH	Difference Per Term @ 12 SCH	Difference Per AY @ 36 SCH
05-GR Resident SCH (incl. EXRES)	430.00	488.00	58	696	2,088
06-GR Non Resident SCH	538.00	565.00	27	324	972
07.0-GR AP MBA Online SCH	430.00	488.00	58	696	2,088
07.1-GR Online SCH RES	430.00	488.00	58	696	2,088
07.2-GR Online SCH NON-RES	430.00	488.00	58	696	2,088
07.3-GR AP M.Ed Online SCH	369.00	419.00	50	600	1,800
08-GR - MEDU SCH	369.00	419.00	50	600	1,800
Other Categories Tuition Rate per SCH	1.00%	5.00%			
09-Staff	51.00	58.00	7	105	315
10-Waived Tuition SCH	-	-	-	-	-
11-Course Based Tuition SCH (excl. On-Line, ASC, EE, STAFF/Co-Pay)	101.00	106.00	5	75	225
12-Adv Southern Credit SCH	45.00	47.00	2	30	90
13-Early Entry Credit SCH	167.00	175.00	8	120	360

President's Recommendation

(This section updated)

SOUTHERN OREGON UNIVERSITY

ASSOU INCIDENTAL AND RECREATION CENTER FEE JOINT RECOMMENDATION

For July 1, 2019 through June 30, 2020

Date: April 10th, 2019

To: Southern Oregon University Board of Trustees

From: Associated Students of Southern Oregon University

DESCRIPTION OF REQUEST

Recommendation for Student Incidental Fee 2019-20 and Student Recreation Center Fee 2019-20

DESCRIPTION OF FUNDS


Student Incidental Fee and Incidental Fee Reserve

Student Recreation Center Fee and Recreation Center Fee Reserve

Summary/Description	Index	Budget
Initial Budget Level (IBL)	Athletics Advisory Committee (AAC)	1,374,292
Initial Budget Level (IBL)	Educational Activities Advisory Committee (EAAC)	693,633
Initial Budget Level (IBL)	Stevens Union Advisory Committee (SUAC)	1,726,502
	Subtotal:	3,794,425
Incidental Fee Reserve	IFCRES	210,805
Building/Equipment Reserve	Building (SUIOBR,SUMBMR) Equipment (SUADDR,SUBERS,SUGNER,SUMIEQ)	-0-
Green Tag Fee	SUGNTF/SUGBEF	166,604
SFC Emergency Reserve		40,000
	Total Initial Budget Level	4,211,834
	Projected Average Student Academic Year FTE	3,904
	Incidental Fee per Term – Academic Year 2019-20	\$360
	Incidental Fee per term – Academic Year Prior Year 2018-19	\$345
	\$ Change from Prior Year	\$15
	% Change from Prior Year	4.25%
	Projected Student FTE Summer Term	1102
	Incidental Fee – Summer Term 2020	\$82
	Incidental Fee – Summer Term Prior Year	\$79
	\$ Change from Prior Year	\$3
	% Change from Prior Year	3.66%
	Projected Average Student FTE	3,904
	Recreation Center Fee per term – Academic Year 2019-20	\$95
	Recreation Center Fee – Academic Year Prior Year	\$95
	\$ Change from Prior Year	\$0
	% Change from Prior Year	0%

JOINT RECOMMENDATION

☒ Approve ☐ Disapprove



President, Associated Students of
Southern Oregon University
Alexis Phillips

04-10-19

Date

☒ Approve ☐ Disapprove



President, Southern Oregon University
Linda Schott

4/10/19

Date

SOUTHERN OREGON UNIVERSITY

MANDATORY FEE RECOMMENDATION

For July 1, 2019 through June 30, 2020

Date: April 15th, 2019

To: Southern Oregon University Board of Trustees

From: Linda Schott, President Southern Oregon University

DESCRIPTION OF REQUEST

Recommendation of mandatory student fees for academic year 2019-20

DESCRIPTION OF FUNDS

Building Fee and Student Health Services Fee for Academic Year and Summer Term

Recommendation and Prior Year Review	Rates	Notes
Building Fee per term – Academic Year 2019-20	\$60	
Building Fee per term – Prior Academic Year 2018-19	\$45	
\$ Change from Prior Year	\$15	
% Change from Prior Year	33%	
Building Fee – Summer Term 2019	\$45	
Building Fee – Prior Summer Term	\$34	
\$ Change from Prior Year	\$11	
% Change from Prior Year	33%	
Student Health Services Fee per term – Academic Year 2019-20*	\$143	*Not applicable to online only students
Student Health Services Fee per term – Prior Academic Year 2018-19	\$140	
\$ Change from Prior Year	\$3	
% Change from Prior Year	2.1%	
Student Health Services Fee – Summer Term 2019*	\$102	*Not applicable to online only students
Student Health Services Fee – Prior Summer Term	\$100	
\$ Change from Prior Year	\$2	
% Change from Prior Year	2%	

PRESIDENT'S RECOMMENDATION

[☒] Approve [☐] Disapprove


President, Southern Oregon University
Linda Schott

4/12/19
Date

SOUTHERN OREGON UNIVERSITY

HOUSING RATE AND MEAL PLAN CHANGE NOTICE

For July 1, 2019 through June 30, 2020

Date: April 15th, 2019

To: Southern Oregon University Board of Trustees

From: Linda Schott, President Southern Oregon University

NOTICE TO THE UNIVERSITY BOARD OF TRUSTEES

The schedule of housing and meal plan rates below will be in effect July 1, 2019.

HOUSING – HALL & TYPE	RATE*	*2.75% Average increase for AY 2019-20
Greensprings Double (only A & B)	\$2,562	
Greensprings Double-as-Single	\$3,384	
Madrone	\$3,962	
Shasta Double	\$2,900	
Shasta Single	\$3,532	
McLoughlin Double	\$3,054	
McLoughlin Single	\$3,792	
McLoughlin Super Single	\$4,172	
MEAL PLANS	RATE*	*3% Average decrease for AY 2019-20
Red Plan	\$1,865	
Black Plan	\$1,865	
S, O, and U Plans*	\$1,535	*Options vary b/t S, O & U
New Plan*	\$1,250	*Not yet named as of 4/10/19
Hawk Plan	\$850	
Madrone Plan	\$800	

SOUTHERN OREGON UNIVERSITY

TUITION RECOMMENDATION

Academic Year 2019-20: Fall 2019 through Summer 2020

Date: May 16th, 2019

To: Southern Oregon University Board of Trustees

From: President Linda Schott

DESCRIPTION OF PROPOSAL

Proposed Tuition Rates for Academic Year 2019-20

Since January 2019, my leadership team and I have worked with members of the Tuition Advisory Council and the Board of Trustees to determine the appropriate level of tuition for academic year (AY) '19-'20. We have considered numerous factors and paid particular attention to the needs of SOU students, the financial stability of the University, expected enrollment in AY19-20, and the level of funding provided by the State of Oregon. The last two items—Fall enrollment and the level of funding provided by the state to the Public University Support Fund (PUSF)—are not yet determined. We are able to make a general prediction about enrollment, using previous enrollment data and early indicators for the coming year. What we are not able to predict is the final level of funding for the PUSF.

For this reason, and upon the recommendation of the Tuition Advisory Council and members of the SOU Cabinet, I recommend that the Board of Trustees for Southern Oregon University approve a range of possible tuition rates for AY19-20 correlated to the level of funding in the PUSF. At the level of funding currently proposed by the legislative Ways and Means Committee (the Governor's Recommended Budget plus \$40.5M or a PUSF of \$777.5M), I recommend that tuition increase by \$23 per credit hour, to a total of \$195 per credit (an increase of 13.5% over AY18). As indicated in Table 1 below, I further recommend that SOU decrease the tuition rate by \$2 per credit hour for each \$20M the legislature is able to increase the PUSF.

I recognize that this recommended tuition increase will increase the need for additional financial aid, and SOU is committed to increasing by \$500,000 the aid that we provide to enable our most economically vulnerable students to achieve their degrees. SOU also is committed to supporting our students with excellent faculty, highly qualified student support staff, and an appropriate array of programs to provide for their mental health, physical well-being, intellectual growth, and degree attainment.

Table 1: Recommended Resident Undergraduate Tuition Rate per PUSF Allocation Scenario

PUSF	PUSF increase from current biennium	Proposed Undergraduate Tuition Rate per credit	Difference Per Credit	Difference Per Term @ 15 Credits	Difference Per Academic Year @ 45 Credits	% Rate Increase
GRB \$737M	\$0	\$201	\$29	\$435	\$1,305	17.0%
\$757M	+20M	\$198	\$26	\$390	\$1,170	15.0%
\$777.5M	+40.5M	\$195	\$23	\$345	\$1,035	13.5%
\$797M	+60M	\$193	\$21	\$315	\$945	12.0%
\$817M	+80M	\$191	\$19	\$285	\$855	11.0%
\$837M	+100M	\$189	\$17	\$255	\$765	10.0%
\$857M	+120M	\$187	\$15	\$225	\$675	8.5%

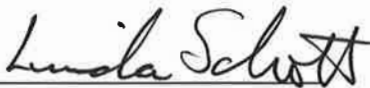
*For undergraduate students, total annual \$ increase assumes 15 student credit hours per term or 45 per academic year

*For graduate students, total annual \$ increase assumes 12 student credit hours per term or 36 per academic year

In addition, the seven figures below depict detailed tuition cost data for each potential Public University Support Fund (PUSF) allocation scenario.

I look forward to our discussions in the May 16th Finance and Administration Committee and full Board of Trustees meetings.

Recommendation: ☒ Approve ☐ Disapprove


President, Southern Oregon University
Linda Schott

5/16/19
Date

Tuition Rate Increases Based on PUSF Allocation Scenarios

Figure 1: PUSF Allocation of \$737M (Governor's Recommended Budget) – 17% Resident increase

	2018-19 Current	2019-20 Proposed	FY20			
Undergraduate Tuition Rate per Credit		Res: 17.0% Non-Res: 5.0%	Difference Per Credit	Difference Per Term @ 15 Credits	Difference Per AY @ 45 Credits	Annual Tuition Cost
01-WUE SCH	\$258	\$302	\$44	\$660	\$1,980	\$13,590
02-UG Resident SCH (incl. EXRES)	\$172	\$201	\$29	\$435	\$1,305	\$9,045
02.2-UG JackJo Pledge	\$115	\$135	\$20	\$300	\$900	\$6,075
03-UG Non Resident SCH	\$526	\$552	\$26	\$390	\$1,170	\$24,840
04.1-UG Online SCH RES	\$172	\$201	\$29	\$435	\$1,305	\$9,045
04.2-UG Online SCH NON-RES	\$172	\$201	\$29	\$435	\$1,305	\$9,045
04.3-UG Online SCH WUE	\$172	\$201	\$29	\$435	\$1,305	\$9,045
Graduate Tuition Rate per Credit		Res: 17.0% Non-Res: 5.0%	Difference Per Credit	Difference Per Term @ 12 Credits	Difference Per AY @ 36 Credits	Annual Tuition Cost
05-GR Resident SCH (incl. EXRES)	\$430	\$503	\$73	\$876	\$2,628	\$18,108
06-GR Non Resident SCH	\$538	\$565	\$27	\$324	\$972	\$20,340
07.0-GR AP MBA Online SCH	\$430	\$503	\$73	\$876	\$2,628	\$18,108
07.1-GR Online SCH RES	\$430	\$503	\$73	\$876	\$2,628	\$18,108
07.2-GR Online SCH NON-RES	\$430	\$503	\$73	\$876	\$2,628	\$18,108
07.3-GR AP M.Ed Online Credit	\$369	\$432	\$63	\$756	\$2,268	\$15,552
08-GR - MEDU SCH	\$369	\$432	\$63	\$756	\$2,268	\$15,552
Other Categories Tuition Rate per Credit		5.00%				
09-Staff	\$51	\$60	\$9	\$135	\$405	\$2,700
10-Waived Tuition SCH	\$0	\$0	\$0	\$0	\$0	\$0
11-Course Based Tuition SCH (excl. On-Line, ASC, EE, STAFF/Co-Pay)	\$101	\$106	\$5	\$75	\$225	\$4,770
12-Adv Southern Credit SCH	\$45	\$47	\$2	\$30	\$90	\$2,115
13-Early Entry Credit SCH	\$167	\$175	\$8	\$120	\$360	\$7,875

Figure 2: PUSF Allocation of \$757M (GRB = \$20M) – 15% increase

	2018-19	2019-20	FY20			
	Current	Proposed				
Undergraduate Tuition Rate per Credit		Res: 15.0% Non-Res: 5.0%	Difference Per Credit	Difference Per Term @ 15 Credits	Difference Per AY @ 45 Credits	Annual Tuition Cost
01-WUE SCH	\$258	\$297	\$39	\$585	\$1,755	\$13,365
02-UG Resident SCH (incl. EXRES)	\$172	\$198	\$26	\$390	\$1,170	\$8,910
02.2-UG JackJo Pledge	\$115	\$132	\$17	\$255	\$765	\$5,940
03-UG Non Resident SCH	\$526	\$552	\$26	\$390	\$1,170	\$24,840
04.1-UG Online SCH RES	\$172	\$198	\$26	\$390	\$1,170	\$8,910
04.2-UG Online SCH NON-RES	\$172	\$198	\$26	\$390	\$1,170	\$8,910
04.3-UG Online SCH WUE	\$172	\$198	\$26	\$390	\$1,170	\$8,910
Graduate Tuition Rate per Credit		Res: 15.0% Non-Res: 5.0%	Difference Per Credit	Difference Per Term @ 12 Credits	Difference Per AY @ 36 Credits	Annual Tuition Cost
05-GR Resident SCH (incl. EXRES)	\$430	\$495	\$65	\$780	\$2,340	\$17,820
06-GR Non Resident SCH	\$538	\$565	\$27	\$324	\$972	\$20,340
07.0-GR AP MBA Online SCH	\$430	\$495	\$65	\$780	\$2,340	\$17,820
07.1-GR Online SCH RES	\$430	\$495	\$65	\$780	\$2,340	\$17,820
07.2-GR Online SCH NON-RES	\$430	\$495	\$65	\$780	\$2,340	\$17,820
07.3-GR AP M.Ed Online Credit	\$369	\$424	\$55	\$660	\$1,980	\$15,264
08-GR - MEDU SCH	\$369	\$424	\$55	\$660	\$1,980	\$15,264
Other Categories Tuition Rate per Credit		5.00%				
09-Staff	\$51	\$59	\$8	\$120	\$360	\$2,655
10-Waived Tuition SCH	\$0	\$0	\$0	\$0	\$0	\$0
11-Course Based Tuition SCH (excl. On-Line, ASC, EE, STAFF/Co-Pay)	\$101	\$106	\$5	\$75	\$225	\$4,770
12-Adv Southern Credit SCH	\$45	\$47	\$2	\$30	\$90	\$2,115
13-Early Entry Credit SCH	\$167	\$175	\$8	\$120	\$360	\$7,875

Figure 3: PUSF Allocation of \$777M (GRB = \$40.5M) – 13.5% increase

	2018-19	2019-20	FY20			
	Current	Proposed				
Undergraduate Tuition Rate per Credit		Res: 13.5% Non-Res: 5.0%	Difference Per Credit	Difference Per Term @ 15 Credits	Difference Per AY @ 45 Credits	Annual Tuition Cost
01-WUE SCH	\$258	\$293	\$35	\$525	\$1,575	\$13,185
02-UG Resident SCH (incl. EXRES)	\$172	\$195	\$23	\$345	\$1,035	\$8,775
02.2-UG JackJo Pledge	\$115	\$131	\$16	\$240	\$720	\$5,895
03-UG Non Resident SCH	\$526	\$552	\$26	\$390	\$1,170	\$24,840
04.1-UG Online SCH RES	\$172	\$195	\$23	\$345	\$1,035	\$8,775
04.2-UG Online SCH NON-RES	\$172	\$195	\$23	\$345	\$1,035	\$8,775
04.3-UG Online SCH WUE	\$172	\$195	\$23	\$345	\$1,035	\$8,775
Graduate Tuition Rate per Credit		Res: 13.5% Non-Res: 5.0%	Difference Per Credit	Difference Per Term @ 12 Credits	Difference Per AY @ 36 Credits	Annual Tuition Cost
05-GR Resident SCH (incl. EXRES)	\$430	\$488	\$58	\$696	\$2,088	\$17,568
06-GR Non Resident SCH	\$538	\$565	\$27	\$324	\$972	\$20,340
07.0-GR AP MBA Online SCH	\$430	\$488	\$58	\$696	\$2,088	\$17,568
07.1-GR Online SCH RES	\$430	\$488	\$58	\$696	\$2,088	\$17,568
07.2-GR Online SCH NON-RES	\$430	\$488	\$58	\$696	\$2,088	\$17,568
07.3-GR AP M.Ed Online Credit	\$369	\$419	\$50	\$600	\$1,800	\$15,084
08-GR - MEDU SCH	\$369	\$419	\$50	\$600	\$1,800	\$15,084
Other Categories Tuition Rate per Credit		5.00%				
09-Staff	\$51	\$58	\$7	\$105	\$315	\$2,610
10-Waived Tuition SCH	\$0	\$0	\$0	\$0	\$0	\$0
11-Course Based Tuition SCH (excl. On-Line, ASC, EE, STAFF/Co-Pay)	\$101	\$106	\$5	\$75	\$225	\$4,770
12-Adv Southern Credit SCH	\$45	\$47	\$2	\$30	\$90	\$2,115
13-Early Entry Credit SCH	\$167	\$175	\$8	\$120	\$360	\$7,875

Figure 4: PUSF Allocation of \$797M (GRB = \$60M) – 12% increase

	2018-19	2019-20	FY20			
	Current	Proposed				
Undergraduate Tuition Rate per Credit		Res: 12.0% Non-Res: 5.0%	Difference Per Credit	Difference Per Term @ 15 Credits	Difference Per AY @ 45 Credits	Annual Tuition Cost
01-WUE SCH	\$258	\$290	\$32	\$480	\$1,440	\$13,050
02-UG Resident SCH (incl. EXRES)	\$172	\$193	\$21	\$315	\$945	\$8,685
02.2-UG JackJo Pledge	\$115	\$129	\$14	\$210	\$630	\$5,805
03-UG Non Resident SCH	\$526	\$552	\$26	\$390	\$1,170	\$24,840
04.1-UG Online SCH RES	\$172	\$193	\$21	\$315	\$945	\$8,685
04.2-UG Online SCH NON-RES	\$172	\$193	\$21	\$315	\$945	\$8,685
04.3-UG Online SCH WUE	\$172	\$193	\$21	\$315	\$945	\$8,685
Graduate Tuition Rate per Credit		Res: 12.0% Non-Res: 5.0%	Difference Per Credit	Difference Per Term @ 12 Credits	Difference Per AY @ 36 Credits	Annual Tuition Cost
05-GR Resident SCH (incl. EXRES)	\$430	\$482	\$52	\$624	\$1,872	\$17,352
06-GR Non Resident SCH	\$538	\$565	\$27	\$324	\$972	\$20,340
07.0-GR AP MBA Online SCH	\$430	\$482	\$52	\$624	\$1,872	\$17,352
07.1-GR Online SCH RES	\$430	\$482	\$52	\$624	\$1,872	\$17,352
07.2-GR Online SCH NON-RES	\$430	\$482	\$52	\$624	\$1,872	\$17,352
07.3-GR AP M.Ed Online Credit	\$369	\$413	\$44	\$528	\$1,584	\$14,868
08-GR - MEDU SCH	\$369	\$413	\$44	\$528	\$1,584	\$14,868
Other Categories Tuition Rate per Credit		5.00%				
09-Staff	\$51	\$57	\$6	\$90	\$270	\$2,565
10-Waived Tuition SCH	\$0	\$0	\$0	\$0	\$0	\$0
11-Course Based Tuition SCH (excl. On-Line, ASC, EE, STAFF/Co-Pay)	\$101	\$106	\$5	\$75	\$225	\$4,770
12-Adv Southern Credit SCH	\$45	\$47	\$2	\$30	\$90	\$2,115
13-Early Entry Credit SCH	\$167	\$175	\$8	\$120	\$360	\$7,875

Figure 5: PUSF Allocation of \$817M (GRB = \$80M) – 11% increase

	2018-19	2019-20	FY20			
	Current	Proposed				
Undergraduate Tuition Rate per Credit		Res: 11.0% Non-Res: 5.0%	Difference Per Credit	Difference Per Term @ 15 Credits	Difference Per AY @ 45 Credits	Annual Tuition Cost
01-WUE SCH	\$258	\$287	\$29	\$435	\$1,305	\$12,915
02-UG Resident SCH (incl. EXRES)	\$172	\$191	\$19	\$285	\$855	\$8,595
02.2-UG JackJo Pledge	\$115	\$128	\$13	\$195	\$585	\$5,760
03-UG Non Resident SCH	\$526	\$552	\$26	\$390	\$1,170	\$24,840
04.1-UG Online SCH RES	\$172	\$191	\$19	\$285	\$855	\$8,595
04.2-UG Online SCH NON-RES	\$172	\$191	\$19	\$285	\$855	\$8,595
04.3-UG Online SCH WUE	\$172	\$191	\$19	\$285	\$855	\$8,595
Graduate Tuition Rate per Credit		Res: 11.0% Non-Res: 5.0%	Difference Per Credit	Difference Per Term @ 12 Credits	Difference Per AY @ 36 Credits	Annual Tuition Cost
05-GR Resident SCH (incl. EXRES)	\$430	\$477	\$47	\$564	\$1,692	\$17,172
06-GR Non Resident SCH	\$538	\$565	\$27	\$324	\$972	\$20,340
07.0-GR AP MBA Online SCH	\$430	\$477	\$47	\$564	\$1,692	\$17,172
07.1-GR Online SCH RES	\$430	\$477	\$47	\$564	\$1,692	\$17,172
07.2-GR Online SCH NON-RES	\$430	\$477	\$47	\$564	\$1,692	\$17,172
07.3-GR AP M.Ed Online Credit	\$369	\$410	\$41	\$492	\$1,476	\$14,760
08-GR - MEDU SCH	\$369	\$410	\$41	\$492	\$1,476	\$14,760
Other Categories Tuition Rate per Credit		5.00%				
09-Staff	\$51	\$57	\$6	\$90	\$270	\$2,565
10-Waived Tuition SCH	\$0	\$0	\$0	\$0	\$0	\$0
11-Course Based Tuition SCH (excl. On-Line, ASC, EE, STAFF/Co-Pay)	\$101	\$106	\$5	\$75	\$225	\$4,770
12-Adv Southern Credit SCH	\$45	\$47	\$2	\$30	\$90	\$2,115
13-Early Entry Credit SCH	\$167	\$175	\$8	\$120	\$360	\$7,875

Figure 6: PUSF Allocation of \$837M (GRB = \$100M)

	2018-19	2019-20	FY20			
	Current	Proposed				
Undergraduate Tuition Rate per Credit		Res: 10.0% Non-Res: 5.0%	Difference Per Credit	Difference Per Term @ 15 Credits	Difference Per AY @ 45 Credits	Annual Tuition Cost
01-WUE SCH	\$258	\$284	\$26	\$390	\$1,170	\$12,780
02-UG Resident SCH (incl. EXRES)	\$172	\$189	\$17	\$255	\$765	\$8,505
02.2-UG JackJo Pledge	\$115	\$127	\$12	\$180	\$540	\$5,715
03-UG Non Resident SCH	\$526	\$552	\$26	\$390	\$1,170	\$24,840
04.1-UG Online SCH RES	\$172	\$189	\$17	\$255	\$765	\$8,505
04.2-UG Online SCH NON-RES	\$172	\$189	\$17	\$255	\$765	\$8,505
04.3-UG Online SCH WUE	\$172	\$189	\$17	\$255	\$765	\$8,505
Graduate Tuition Rate per Credit		Res: 10.0% Non-Res: 5.0%	Difference Per Credit	Difference Per Term @ 12 Credits	Difference Per AY @ 36 Credits	Annual Tuition Cost
05-GR Resident SCH (incl. EXRES)	\$430	\$473	\$43	\$516	\$1,548	\$17,028
06-GR Non Resident SCH	\$538	\$565	\$27	\$324	\$972	\$20,340
07.0-GR AP MBA Online SCH	\$430	\$473	\$43	\$516	\$1,548	\$17,028
07.1-GR Online SCH RES	\$430	\$473	\$43	\$516	\$1,548	\$17,028
07.2-GR Online SCH NON-RES	\$430	\$473	\$43	\$516	\$1,548	\$17,028
07.3-GR AP M.Ed Online Credit	\$369	\$406	\$37	\$444	\$1,332	\$14,616
08-GR - MEDU SCH	\$369	\$406	\$37	\$444	\$1,332	\$14,616
Other Categories Tuition Rate per Credit		5.00%				
09-Staff	\$51	\$56	\$5	\$75	\$225	\$2,520
10-Waived Tuition SCH	\$0	\$0	\$0	\$0	\$0	\$0
11-Course Based Tuition SCH (excl. On-Line, ASC, EE, STAFF/Co-Pay)	\$101	\$106	\$5	\$75	\$225	\$4,770
12-Adv Southern Credit SCH	\$45	\$47	\$2	\$30	\$90	\$2,115
13-Early Entry Credit SCH	\$167	\$175	\$8	\$120	\$360	\$7,875

Figure 7: PUSF Allocation of \$857M (GRB = \$120M)

	2018-19	2019-20	FY20			
	Current	Proposed				
Undergraduate Tuition Rate per Credit		Res: 8.5% Non-Res: 5.0%	Difference Per Credit	Difference Per Term @ 15 Credits	Difference Per AY @ 45 Credits	Annual Tuition Cost
01-WUE SCH	\$258	\$281	\$23	\$345	\$1,035	\$12,645
02-UG Resident SCH (incl. EXRES)	\$172	\$187	\$15	\$225	\$675	\$8,415
02.2-UG JackJo Pledge	\$115	\$125	\$10	\$150	\$450	\$5,625
03-UG Non Resident SCH	\$526	\$552	\$26	\$390	\$1,170	\$24,840
04.1-UG Online SCH RES	\$172	\$187	\$15	\$225	\$675	\$8,415
04.2-UG Online SCH NON-RES	\$172	\$187	\$15	\$225	\$675	\$8,415
04.3-UG Online SCH WUE	\$172	\$187	\$15	\$225	\$675	\$8,415
Graduate Tuition Rate per Credit		Res: 8.5% Non-Res: 5.0%	Difference Per Credit	Difference Per Term @ 12 Credits	Difference Per AY @ 36 Credits	Annual Tuition Cost
05-GR Resident SCH (incl. EXRES)	\$430	\$467	\$37	\$444	\$1,332	\$16,812
06-GR Non Resident SCH	\$538	\$565	\$27	\$324	\$972	\$20,340
07.0-GR AP MBA Online SCH	\$430	\$467	\$37	\$444	\$1,332	\$16,812
07.1-GR Online SCH RES	\$430	\$467	\$37	\$444	\$1,332	\$16,812
07.2-GR Online SCH NON-RES	\$430	\$467	\$37	\$444	\$1,332	\$16,812
07.3-GR AP M.Ed Online Credit	\$369	\$400	\$31	\$372	\$1,116	\$14,400
08-GR - MEDU SCH	\$369	\$400	\$31	\$372	\$1,116	\$14,400
Other Categories Tuition Rate per Credit		5.00%				
09-Staff	\$51	\$56	\$5	\$75	\$225	\$2,520
10-Waived Tuition SCH	\$0	\$0	\$0	\$0	\$0	\$0
11-Course Based Tuition SCH (excl. On-Line, ASC, EE, STAFF/Co-Pay)	\$101	\$106	\$5	\$75	\$225	\$4,770
12-Adv Southern Credit SCH	\$45	\$47	\$2	\$30	\$90	\$2,115
13-Early Entry Credit SCH	\$167	\$175	\$8	\$120	\$360	\$7,875

Updated View of SOU in Relation to Oregon Comparators*



Resident Undergraduate Tuition Rates

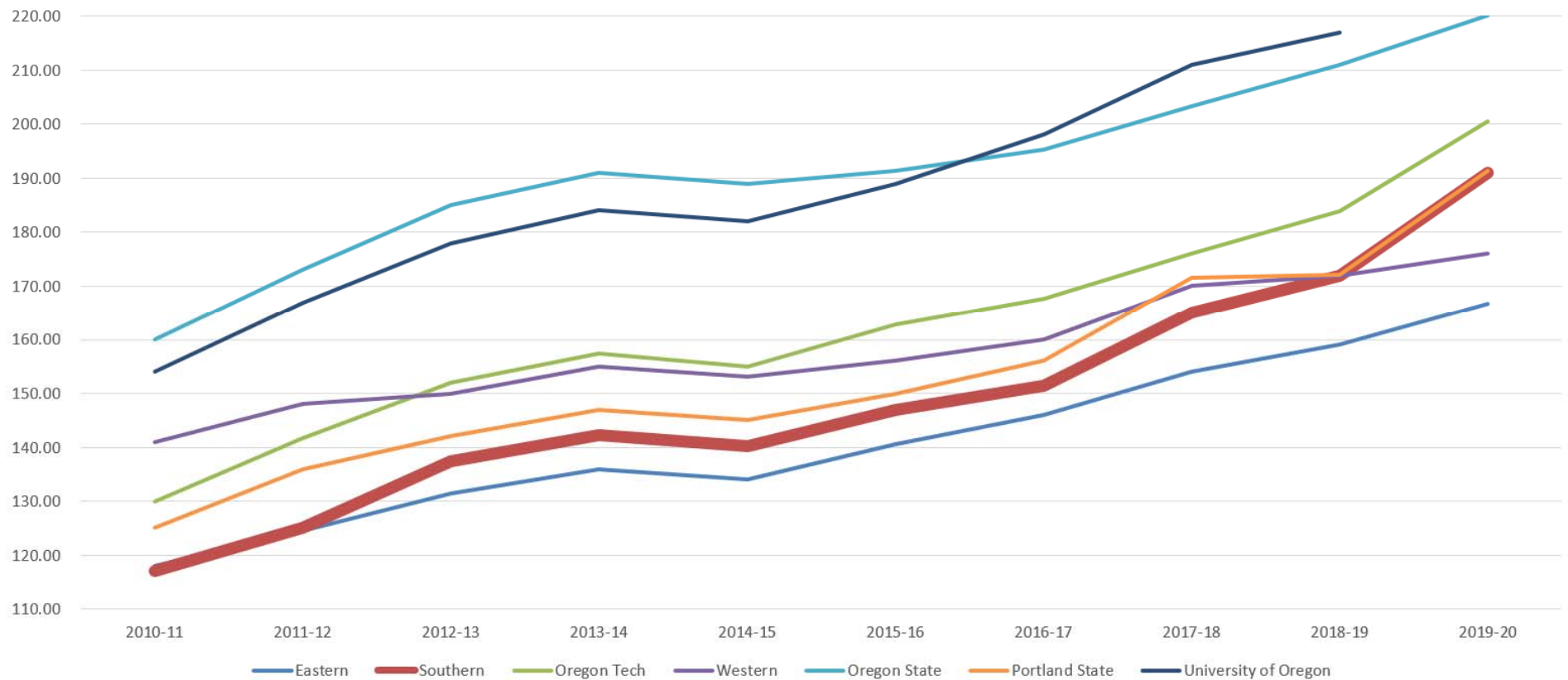
Institution	2016-17	2017-18	2018-19	2019-20	AY % Increase
Eastern	146.00	153.95	159.00	166.79	4.90%
Southern	151.46	165.04	172.00		
Oregon Tech	167.63	176.01	183.93	200.48	9.00%
Western	160.00	170.00	172.00	176.01	2.33%
Oregon State	195.33	203.33	211.00	220.05	4.29%
Portland State	156.00	171.60	172.23	191.36	11.11%
University of Oregon	198.00	211.00	217.00		

* Rates based on latest available board decisions or publicly available proposals, as appropriate.

SOU in Relation to Oregon Comparators



Oregon Resident UG Tuition 2010 - 2020



**Southern Oregon University
Board of Trustees**

**RESOLUTION
Tuition and Mandatory Fees for Academic Year 2019 - 20**

Whereas, the Southern Oregon University Board of Trustees (“the board”) has the authority to establish tuition and mandatory enrollment fees in accordance with ORS. 352.102, ORS 352.105 and other applicable laws and policy, including the Board Statement on Delegation of Authority;

Whereas, the Board adopted a process for Establishing Tuition and Mandatory Fees on February 18, 2016 and subsequently revised it on January 18, 2019;

Whereas, the board authorizes the collection of mandatory incidental fees which have been recommended jointly by the president of the university and the recognized student government, the Associated Students of Southern Oregon University (ASSOU), and established in accordance with provisions outlined in ORS 352.102 and ORS 352.105;

Whereas, the university’s Tuition Advisory Council, which is comprised of representatives from various campus constituencies including but not limited to students, student government, faculty, and staff has recommended to the University President tuition and mandatory enrollment fees for Academic Year 2019-20 (AY19-20);

Whereas, after considering numerous factors including but not limited to historical tuition and fee trends, comparative data of peer institutions, the university’s budget and projected costs, anticipated funding including anticipated state appropriation levels, and applicable fee recommendations, the University President has provided the board tuition and mandatory enrollment fee recommendations for consideration;

Whereas, the university, in close consultation with the board throughout the current academic year, has engaged in a thorough process for determining tuition and mandatory enrollment fees; the president has recommended to the Finance and Administration Committee that the proposed tuition and mandatory fees schedules be submitted to the full Board of Trustees for consideration and approval; and

Whereas, the board considers a number of factors, including the desire to: create affordable access to programs and courses; encourage a diverse student body; maintain quality academic programs; encourage enrollment, persistence, and graduation of students; maintain the university infrastructure necessary to support the academic, cultural and physical development of its students; and support the educational goals of the State of Oregon;

Now, therefore, be it resolved, the Board of Trustees of Southern Oregon University hereby adopts the AY19-20 tuition and mandatory fee schedules as presented in Figure(s) # # of “Exhibit A” and “Exhibit B,” attached hereto, [as proposed] or [as amended], to become effective July 1, 2019.

Be it further resolved, that if the Oregon State Legislature increases the Public University Support Fund beyond the \$737 million proposed in the Governor’s Recommended Budget, the university shall amend the AY19-20 tuition rates consistent with Table 1, as presented below.

Table 1: Recommended Resident Undergraduate Tuition Rate per PUSF Allocation Scenario

PUSF	PUSF Change from current biennium	Resident Undergraduate Tuition change per credit	Resident Undergraduate Tuition Rate per Term	Annual Tuition Increase from Prior Academic Year	% Rate Increase
GRB \$737	\$0	\$29	\$201	\$1,305	17.0%
\$757M	+20M	\$26	\$198	\$1,170	15.0%
\$777.5M	+40.5M	\$23	\$195	\$1,035	13.5%
\$797M	+60M	\$21	\$193	\$945	12.0%
\$817M	+80M	\$19	\$191	\$855	11.0%
\$837M	+100M	\$17	\$189	\$765	10.0%
\$857M	+120M	\$15	\$187	\$675	8.5%

*For undergraduate students, total annual \$ increase assumes 15 student credit hours per term or 45 per academic year

*For graduate students, total annual \$ increase assumes 12 student credit hours per term or 36 per academic year

VOTE:

DATE: May 16, 2019

University Board Secretary

EXHIBIT A

Figure 1: PUSF Allocation of \$737M (Governor's Recommended Budget) – 17% Resident increase

	2018-19 Current	2019-20 Proposed	FY20			
Undergraduate Tuition Rate per Credit		Res: 17.0% Non-Res: 5.0%	Difference Per Credit	Difference Per Term @ 15 Credits	Difference Per AY @ 45 Credits	Annual Tuition Cost
01-WUE SCH	\$258	\$302	\$44	\$660	\$1,980	\$13,590
02-UG Resident SCH (incl. EXRES)	\$172	\$201	\$29	\$435	\$1,305	\$9,045
02.2-UG JackJo Pledge	\$115	\$135	\$20	\$300	\$900	\$6,075
03-UG Non Resident SCH	\$526	\$552	\$26	\$390	\$1,170	\$24,840
04.1-UG Online SCH RES	\$172	\$201	\$29	\$435	\$1,305	\$9,045
04.2-UG Online SCH NON-RES	\$172	\$201	\$29	\$435	\$1,305	\$9,045
04.3-UG Online SCH WUE	\$172	\$201	\$29	\$435	\$1,305	\$9,045
Graduate Tuition Rate per Credit		Res: 17.0% Non-Res: 5.0%	Difference Per Credit	Difference Per Term @ 12 Credits	Difference Per AY @ 36 Credits	Annual Tuition Cost
05-GR Resident SCH (incl. EXRES)	\$430	\$503	\$73	\$876	\$2,628	\$18,108
06-GR Non Resident SCH	\$538	\$565	\$27	\$324	\$972	\$20,340
07.0-GR AP MBA Online SCH	\$430	\$503	\$73	\$876	\$2,628	\$18,108
07.1-GR Online SCH RES	\$430	\$503	\$73	\$876	\$2,628	\$18,108
07.2-GR Online SCH NON-RES	\$430	\$503	\$73	\$876	\$2,628	\$18,108
07.3-GR AP M.Ed Online Credit	\$369	\$432	\$63	\$756	\$2,268	\$15,552
08-GR - MEDU SCH	\$369	\$432	\$63	\$756	\$2,268	\$15,552
Other Categories Tuition Rate per Credit		5.00%				
09-Staff	\$51	\$60	\$9	\$135	\$405	\$2,700
10-Waived Tuition SCH	\$0	\$0	\$0	\$0	\$0	\$0
11-Course Based Tuition SCH (excl. On-Line, ASC, EE, STAFF/Co-Pay)	\$101	\$106	\$5	\$75	\$225	\$4,770
12-Adv Southern Credit SCH	\$45	\$47	\$2	\$30	\$90	\$2,115
13-Early Entry Credit SCH	\$167	\$175	\$8	\$120	\$360	\$7,875

Figure 2: PUSF Allocation of \$757M (GRB = \$20M) – 15% increase

	2018-19 Current	2019-20 Proposed	FY20			
Undergraduate Tuition Rate per Credit		Res: 15.0% Non-Res: 5.0%	Difference Per Credit	Difference Per Term @ 15 Credits	Difference Per AY @ 45 Credits	Annual Tuition Cost
01-WUE SCH	\$258	\$297	\$39	\$585	\$1,755	\$13,365
02-UG Resident SCH (incl. EXRES)	\$172	\$198	\$26	\$390	\$1,170	\$8,910
02.2-UG JackJo Pledge	\$115	\$132	\$17	\$255	\$765	\$5,940
03-UG Non Resident SCH	\$526	\$552	\$26	\$390	\$1,170	\$24,840
04.1-UG Online SCH RES	\$172	\$198	\$26	\$390	\$1,170	\$8,910
04.2-UG Online SCH NON-RES	\$172	\$198	\$26	\$390	\$1,170	\$8,910
04.3-UG Online SCH WUE	\$172	\$198	\$26	\$390	\$1,170	\$8,910
Graduate Tuition Rate per Credit		Res: 15.0% Non-Res: 5.0%	Difference Per Credit	Difference Per Term @ 12 Credits	Difference Per AY @ 36 Credits	Annual Tuition Cost
05-GR Resident SCH (incl. EXRES)	\$430	\$495	\$65	\$780	\$2,340	\$17,820
06-GR Non Resident SCH	\$538	\$565	\$27	\$324	\$972	\$20,340
07.0-GR AP MBA Online SCH	\$430	\$495	\$65	\$780	\$2,340	\$17,820
07.1-GR Online SCH RES	\$430	\$495	\$65	\$780	\$2,340	\$17,820
07.2-GR Online SCH NON-RES	\$430	\$495	\$65	\$780	\$2,340	\$17,820
07.3-GR AP M.Ed Online Credit	\$369	\$424	\$55	\$660	\$1,980	\$15,264
08-GR - MEDU SCH	\$369	\$424	\$55	\$660	\$1,980	\$15,264
Other Categories Tuition Rate per Credit		5.00%				
09-Staff	\$51	\$59	\$8	\$120	\$360	\$2,655
10-Waived Tuition SCH	\$0	\$0	\$0	\$0	\$0	\$0
11-Course Based Tuition SCH (excl. On-Line, ASC, EE, STAFF/Co-Pay)	\$101	\$106	\$5	\$75	\$225	\$4,770
12-Adv Southern Credit SCH	\$45	\$47	\$2	\$30	\$90	\$2,115
13-Early Entry Credit SCH	\$167	\$175	\$8	\$120	\$360	\$7,875

Figure 3: PUSF Allocation of \$777M (GRB = \$40.5M) – 13.5% increase

	2018-19 Current	2019-20 Proposed	FY20			
Undergraduate Tuition Rate per Credit	Res: 13.5% Non-Res: 5.0%		Difference Per Credit	Difference Per Term @ 15 Credits	Difference Per AY @ 45 Credits	Annual Tuition Cost
01-WUE SCH	\$258	\$293	\$35	\$525	\$1,575	\$13,185
02-UG Resident SCH (incl. EXRES)	\$172	\$195	\$23	\$345	\$1,035	\$8,775
02.2-UG JackJo Pledge	\$115	\$131	\$16	\$240	\$720	\$5,895
03-UG Non Resident SCH	\$526	\$552	\$26	\$390	\$1,170	\$24,840
04.1-UG Online SCH RES	\$172	\$195	\$23	\$345	\$1,035	\$8,775
04.2-UG Online SCH NON-RES	\$172	\$195	\$23	\$345	\$1,035	\$8,775
04.3-UG Online SCH WUE	\$172	\$195	\$23	\$345	\$1,035	\$8,775
Graduate Tuition Rate per Credit	Res: 13.5% Non-Res: 5.0%		Difference Per Credit	Difference Per Term @ 12 Credits	Difference Per AY @ 36 Credits	Annual Tuition Cost
05-GR Resident SCH (incl. EXRES)	\$430	\$488	\$58	\$696	\$2,088	\$17,568
06-GR Non Resident SCH	\$538	\$565	\$27	\$324	\$972	\$20,340
07.0-GR AP MBA Online SCH	\$430	\$488	\$58	\$696	\$2,088	\$17,568
07.1-GR Online SCH RES	\$430	\$488	\$58	\$696	\$2,088	\$17,568
07.2-GR Online SCH NON-RES	\$430	\$488	\$58	\$696	\$2,088	\$17,568
07.3-GR AP M.Ed Online Credit	\$369	\$419	\$50	\$600	\$1,800	\$15,084
08-GR - MEDU SCH	\$369	\$419	\$50	\$600	\$1,800	\$15,084
Other Categories Tuition Rate per Credit	5.00%					
09-Staff	\$51	\$58	\$7	\$105	\$315	\$2,610
10-Waived Tuition SCH	\$0	\$0	\$0	\$0	\$0	\$0
11-Course Based Tuition SCH (excl. On-Line, ASC, EE, STAFF/Co-Pay)	\$101	\$106	\$5	\$75	\$225	\$4,770
12-Adv Southern Credit SCH	\$45	\$47	\$2	\$30	\$90	\$2,115
13-Early Entry Credit SCH	\$167	\$175	\$8	\$120	\$360	\$7,875

Figure 4: PUSF Allocation of \$797M (GRB = \$60M) – 12% increase

	2018-19 Current	2019-20 Proposed	FY20			
Undergraduate Tuition Rate per Credit	Res: 12.0% Non-Res: 5.0%		Difference Per Credit	Difference Per Term @ 15 Credits	Difference Per AY @ 45 Credits	Annual Tuition Cost
01-WUE SCH	\$258	\$290	\$32	\$480	\$1,440	\$13,050
02-UG Resident SCH (incl. EXRES)	\$172	\$193	\$21	\$315	\$945	\$8,685
02.2-UG JackJo Pledge	\$115	\$129	\$14	\$210	\$630	\$5,805
03-UG Non Resident SCH	\$526	\$552	\$26	\$390	\$1,170	\$24,840
04.1-UG Online SCH RES	\$172	\$193	\$21	\$315	\$945	\$8,685
04.2-UG Online SCH NON-RES	\$172	\$193	\$21	\$315	\$945	\$8,685
04.3-UG Online SCH WUE	\$172	\$193	\$21	\$315	\$945	\$8,685
Graduate Tuition Rate per Credit	Res: 12.0% Non-Res: 5.0%		Difference Per Credit	Difference Per Term @ 12 Credits	Difference Per AY @ 36 Credits	Annual Tuition Cost
05-GR Resident SCH (incl. EXRES)	\$430	\$482	\$52	\$624	\$1,872	\$17,352
06-GR Non Resident SCH	\$538	\$565	\$27	\$324	\$972	\$20,340
07.0-GR AP MBA Online SCH	\$430	\$482	\$52	\$624	\$1,872	\$17,352
07.1-GR Online SCH RES	\$430	\$482	\$52	\$624	\$1,872	\$17,352
07.2-GR Online SCH NON-RES	\$430	\$482	\$52	\$624	\$1,872	\$17,352
07.3-GR AP M.Ed Online Credit	\$369	\$413	\$44	\$528	\$1,584	\$14,868
08-GR - MEDU SCH	\$369	\$413	\$44	\$528	\$1,584	\$14,868
Other Categories Tuition Rate per Credit	5.00%					
09-Staff	\$51	\$57	\$6	\$90	\$270	\$2,565
10-Waived Tuition SCH	\$0	\$0	\$0	\$0	\$0	\$0
11-Course Based Tuition SCH (excl. On-Line, ASC, EE, STAFF/Co-Pay)	\$101	\$106	\$5	\$75	\$225	\$4,770
12-Adv Southern Credit SCH	\$45	\$47	\$2	\$30	\$90	\$2,115
13-Early Entry Credit SCH	\$167	\$175	\$8	\$120	\$360	\$7,875

Figure 5: PUSF Allocation of \$817M (GRB = \$80M) – 11% increase

	2018-19	2019-20	FY20			
	Current	Proposed				
Undergraduate Tuition Rate per Credit		Res: 11.0% Non-Res: 5.0%	Difference Per Credit	Difference Per Term @ 15 Credits	Difference Per AY @ 45 Credits	Annual Tuition Cost
01-WUE SCH	\$258	\$287	\$29	\$435	\$1,305	\$12,915
02-UG Resident SCH (incl. EXRES)	\$172	\$191	\$19	\$285	\$855	\$8,595
02.2-UG JackJo Pledge	\$115	\$128	\$13	\$195	\$585	\$5,760
03-UG Non Resident SCH	\$526	\$552	\$26	\$390	\$1,170	\$24,840
04.1-UG Online SCH RES	\$172	\$191	\$19	\$285	\$855	\$8,595
04.2-UG Online SCH NON-RES	\$172	\$191	\$19	\$285	\$855	\$8,595
04.3-UG Online SCH WUE	\$172	\$191	\$19	\$285	\$855	\$8,595
Graduate Tuition Rate per Credit		Res: 11.0% Non-Res: 5.0%	Difference Per Credit	Difference Per Term @ 12 Credits	Difference Per AY @ 36 Credits	Annual Tuition Cost
05-GR Resident SCH (incl. EXRES)	\$430	\$477	\$47	\$564	\$1,692	\$17,172
06-GR Non Resident SCH	\$538	\$565	\$27	\$324	\$972	\$20,340
07.0-GR AP MBA Online SCH	\$430	\$477	\$47	\$564	\$1,692	\$17,172
07.1-GR Online SCH RES	\$430	\$477	\$47	\$564	\$1,692	\$17,172
07.2-GR Online SCH NON-RES	\$430	\$477	\$47	\$564	\$1,692	\$17,172
07.3-GR AP M.Ed Online Credit	\$369	\$410	\$41	\$492	\$1,476	\$14,760
08-GR - MEDU SCH	\$369	\$410	\$41	\$492	\$1,476	\$14,760
Other Categories Tuition Rate per Credit		5.00%				
09-Staff	\$51	\$57	\$6	\$90	\$270	\$2,565
10-Waived Tuition SCH	\$0	\$0	\$0	\$0	\$0	\$0
11-Course Based Tuition SCH (excl. On-Line, ASC, EE, STAFF/Co-Pay)	\$101	\$106	\$5	\$75	\$225	\$4,770
12-Adv Southern Credit SCH	\$45	\$47	\$2	\$30	\$90	\$2,115
13-Early Entry Credit SCH	\$167	\$175	\$8	\$120	\$360	\$7,875

Figure 6: PUSF Allocation of \$837M (GRB = \$100M)

	2018-19	2019-20	FY20			
	Current	Proposed				
Undergraduate Tuition Rate per Credit		Res: 10.0% Non-Res: 5.0%	Difference Per Credit	Difference Per Term @ 15 Credits	Difference Per AY @ 45 Credits	Annual Tuition Cost
01-WUE SCH	\$258	\$284	\$26	\$390	\$1,170	\$12,780
02-UG Resident SCH (incl. EXRES)	\$172	\$189	\$17	\$255	\$765	\$8,505
02.2-UG JackJo Pledge	\$115	\$127	\$12	\$180	\$540	\$5,715
03-UG Non Resident SCH	\$526	\$552	\$26	\$390	\$1,170	\$24,840
04.1-UG Online SCH RES	\$172	\$189	\$17	\$255	\$765	\$8,505
04.2-UG Online SCH NON-RES	\$172	\$189	\$17	\$255	\$765	\$8,505
04.3-UG Online SCH WUE	\$172	\$189	\$17	\$255	\$765	\$8,505
Graduate Tuition Rate per Credit		Res: 10.0% Non-Res: 5.0%	Difference Per Credit	Difference Per Term @ 12 Credits	Difference Per AY @ 36 Credits	Annual Tuition Cost
05-GR Resident SCH (incl. EXRES)	\$430	\$473	\$43	\$516	\$1,548	\$17,028
06-GR Non Resident SCH	\$538	\$565	\$27	\$324	\$972	\$20,340
07.0-GR AP MBA Online SCH	\$430	\$473	\$43	\$516	\$1,548	\$17,028
07.1-GR Online SCH RES	\$430	\$473	\$43	\$516	\$1,548	\$17,028
07.2-GR Online SCH NON-RES	\$430	\$473	\$43	\$516	\$1,548	\$17,028
07.3-GR AP M.Ed Online Credit	\$369	\$406	\$37	\$444	\$1,332	\$14,616
08-GR - MEDU SCH	\$369	\$406	\$37	\$444	\$1,332	\$14,616
Other Categories Tuition Rate per Credit		5.00%				
09-Staff	\$51	\$56	\$5	\$75	\$225	\$2,520
10-Waived Tuition SCH	\$0	\$0	\$0	\$0	\$0	\$0
11-Course Based Tuition SCH (excl. On-Line, ASC, EE, STAFF/Co-Pay)	\$101	\$106	\$5	\$75	\$225	\$4,770
12-Adv Southern Credit SCH	\$45	\$47	\$2	\$30	\$90	\$2,115
13-Early Entry Credit SCH	\$167	\$175	\$8	\$120	\$360	\$7,875

Figure 7: PUSF Allocation of \$857M (GRB = \$120M)

	2018-19	2019-20	FY20			
	Current	Proposed				
Undergraduate Tuition Rate per Credit	Res: 8.5% Non-Res: 5.0%		Difference Per Credit	Difference Per Term @ 15 Credits	Difference Per AY @ 45 Credits	Annual Tuition Cost
01-WUE SCH	\$258	\$281	\$23	\$345	\$1,035	\$12,645
02-UG Resident SCH (incl. EXRES)	\$172	\$187	\$15	\$225	\$675	\$8,415
02.2-UG JackJo Pledge	\$115	\$125	\$10	\$150	\$450	\$5,625
03-UG Non Resident SCH	\$526	\$552	\$26	\$390	\$1,170	\$24,840
04.1-UG Online SCH RES	\$172	\$187	\$15	\$225	\$675	\$8,415
04.2-UG Online SCH NON-RES	\$172	\$187	\$15	\$225	\$675	\$8,415
04.3-UG Online SCH WUE	\$172	\$187	\$15	\$225	\$675	\$8,415
Graduate Tuition Rate per Credit	Res: 8.5% Non-Res: 5.0%		Difference Per Credit	Difference Per Term @ 12 Credits	Difference Per AY @ 36 Credits	Annual Tuition Cost
05-GR Resident SCH (incl. EXRES)	\$430	\$467	\$37	\$444	\$1,332	\$16,812
06-GR Non Resident SCH	\$538	\$565	\$27	\$324	\$972	\$20,340
07.0-GR AP MBA Online SCH	\$430	\$467	\$37	\$444	\$1,332	\$16,812
07.1-GR Online SCH RES	\$430	\$467	\$37	\$444	\$1,332	\$16,812
07.2-GR Online SCH NON-RES	\$430	\$467	\$37	\$444	\$1,332	\$16,812
07.3-GR AP M.Ed Online Credit	\$369	\$400	\$31	\$372	\$1,116	\$14,400
08-GR - MEDU SCH	\$369	\$400	\$31	\$372	\$1,116	\$14,400
Other Categories Tuition Rate per Credit	5.00%					
09-Staff	\$51	\$56	\$5	\$75	\$225	\$2,520
10-Waived Tuition SCH	\$0	\$0	\$0	\$0	\$0	\$0
11-Course Based Tuition SCH (excl. On-Line, ASC, EE, STAFF/Co-Pay)	\$101	\$106	\$5	\$75	\$225	\$4,770
12-Adv Southern Credit SCH	\$45	\$47	\$2	\$30	\$90	\$2,115
13-Early Entry Credit SCH	\$167	\$175	\$8	\$120	\$360	\$7,875

EXHIBIT B

Figure 1: Student Incidental Fee and Incidental Fee Reserve

Summary/Description	Index	Budget
Initial Budget Level (IBL)	Athletics Advisory Committee (AAC)	1,374,292
Initial Budget Level (IBL)	Educational Activities Advisory Committee (EAAC)	693,633
Initial Budget Level (IBL)	Stevens Union Advisory Committee (SUAC)	1,726,502
	Subtotal:	3,794,425
Incidental Fee Reserve	IFCRES	210,805
Building/Equipment Reserve	Building (SUIOBR,SUMBMR) Equipment (SUADDR,SUBERS,SUGNER,SUMIEQ)	-0-
Green Tag Fee	SUGNTF/SUGBEF	166,604
SFC Emergency Reserve		40,000
	Total Initial Budget Level	4,211,834

	Projected Average Student Academic Year FTE	3,904
	Incidental Fee per Term – Academic Year 2019-20	\$360
	Incidental Fee per term – Prior Academic Year 2018-19	\$345
	\$ Change from Prior Year	\$15
	% Change from Prior Year	4.25%

	Projected Student FTE Summer Term	1102
	Incidental Fee – Summer Term 2020	\$82
	Incidental Fee – Summer Term Prior Year	\$79
	\$ Change from Prior Year	\$3
	% Change from Prior Year	3.66%

	Projected Average Student FTE	3,904
	Recreation Center Fee per term – Academic Year 2019-20	\$95
	Recreation Center Fee – Prior Academic Year 2018-19	\$95
	\$ Change from Prior Year	\$0
	% Change from Prior Year	0%

Figure 2: Mandatory Fees

Recommendation and Prior Year Review	Rates	Notes
Building Fee per term – Academic Year 2019-20	\$60	
Building Fee per term – Prior Academic Year 2018-19	\$45	
\$ Change from Prior Year	\$15	
% Change from Prior Year	33%	
Building Fee – Summer Term 2019	\$45	
Building Fee – Prior Summer Term	\$34	
\$ Change from Prior Year	\$11	
% Change from Prior Year	33%	
Student Health Services Fee per term – Academic Year 2019-20*	\$143	*Not applicable to online only students
Student Health Services Fee per term – Prior Academic Year 2018-19	\$140	
\$ Change from Prior Year	\$3	
% Change from Prior Year	2.1%	
Student Health Services Fee – Summer Term 2019*	\$102	*Not applicable to online only students
Student Health Services Fee – Prior Summer Term	\$100	
\$ Change from Prior Year	\$2	
% Change from Prior Year	2%	

Fiscal Year 2019-2020 Budget Information

(Review of dynamic Pro Forma in meeting)

Future Meetings

Adjournment



Setting Tuition & Fees 2019-2020

**Southern
OREGON
UNIVERSITY**



Tuition Advisory Council Update

Sue Walsh, Greg Perkinson

HOUSE BILL 4141 COMPLIANCE MEASURES

1. The University must create a shared governance body that advises the President concerning resident tuition and fees recommendations to be brought before the University's Board of Trustees; SOU chartered the Tuition Advisory Council.
2. That body must provide a written document describing the role of the advisory council and be composed of at least:
 - ☒ a) Two Administrators
 - ☒ b) Two Faculty
 - ☒ c) Two Students representing Student Government
 - ☒ d) Two Students representing historically underserved students
3. The University must provide training on:
 - ☒ a) The budget of the university
 - ☒ b) The legislative appropriation process
 - ☒ c) Data showing the relationship between tuition and fees to state appropriations

-
4. The University must provide the council with:
- ☒ a) A plan for managing costs
 - ☒ b) A plan for how tuition and fees *could be decreased* if the university receives extra appropriations
5. If the council feels a recommendation greater than 5% annually is necessary, the council must document its consideration of:
- ☒ a) The impact of that increase on students, especially historically underserved students
 - ☒ b) The impact of that increase on the mission of the University
 - ☒ c) Alternative scenarios involving smaller increases
6. The council must also:
- ☒ a) Provide opportunities for students to actively participate in the process and deliberations
 - ☒ b) Provide a written report to the President with recommendations, deliberations and observations about tuition and fees for the upcoming academic year including any sub-reports requested by members of the council or other documentation produced or received by the council
7. The University must ensure that the process is described on the University's website and include downloadable materials such as:
- ☒ a) The council's role and relationship to the Board
 - ☒ b) Any documentation, agendas and data considered during deliberations

SOU Tuition Advisory Council

The Tuition Advisory Council (TAC) is Southern Oregon University's official advisory group charged with reviewing and recommending tuition and fee proposals each year, prior to their submission to the President and Board of Trustees. Established after the passing of [Oregon Senate Bill 242](#) in 2011, which required Universities to obtain student input in tuition and enrollment fees, the goal of the Tuition Advisory Council (TAC) is to provide a shared governance opportunity for students on campus to become familiar with university finances. Ultimately the council strives to create an environment where students, faculty, and administrators can provide meaningful feedback prior to the University formally submitting proposed tuition rates to the Board of Trustees and then to the Higher Education Coordinating Commission (HECC).

[See SOU Tuition Advisory Council Charter](#)

[See Institutional Research Enrollment Data](#)

[See House Bill 4141 Compliance Measures](#)

[See Strategic Communication Plan](#)

TAC Meetings

December 4th, 2018: 8 – 9 am Churchill Conference Room (CH 133)

[Agenda 12.4.18](#), [Materials 12.4.18](#), [Minutes 12.4.18](#)

January 28th, 2019: 1:30 – 2:30 pm Churchill Conference Room (CH 133)

[Agenda 1.28.19](#), [Materials 1.28.19](#), [Minutes 1.28.19](#)

February 4th, 2019: 1:30 – 2:30 pm Churchill Conference Room (CH 133)

[Agenda 2.4.19](#), [Materials 2.4.19](#), [Minutes 2.4.19](#)

February 11th, 2019: 1:30 – 2:30 pm Churchill Conference Room (CH 133)

[Agenda 2.11.19](#), [Materials 2.11.19](#), [Minutes 2.11.19](#)

February 18th, 2019: 1:30 – 2:30 pm Churchill Conference Room (CH 133)

[Agenda 2.18.19](#), [Minutes 2.18.19](#)

February 25th, 2019: 1:30 – 2:30 pm Churchill Conference Room (CH 133)

Summary of TAC Recommendation to President

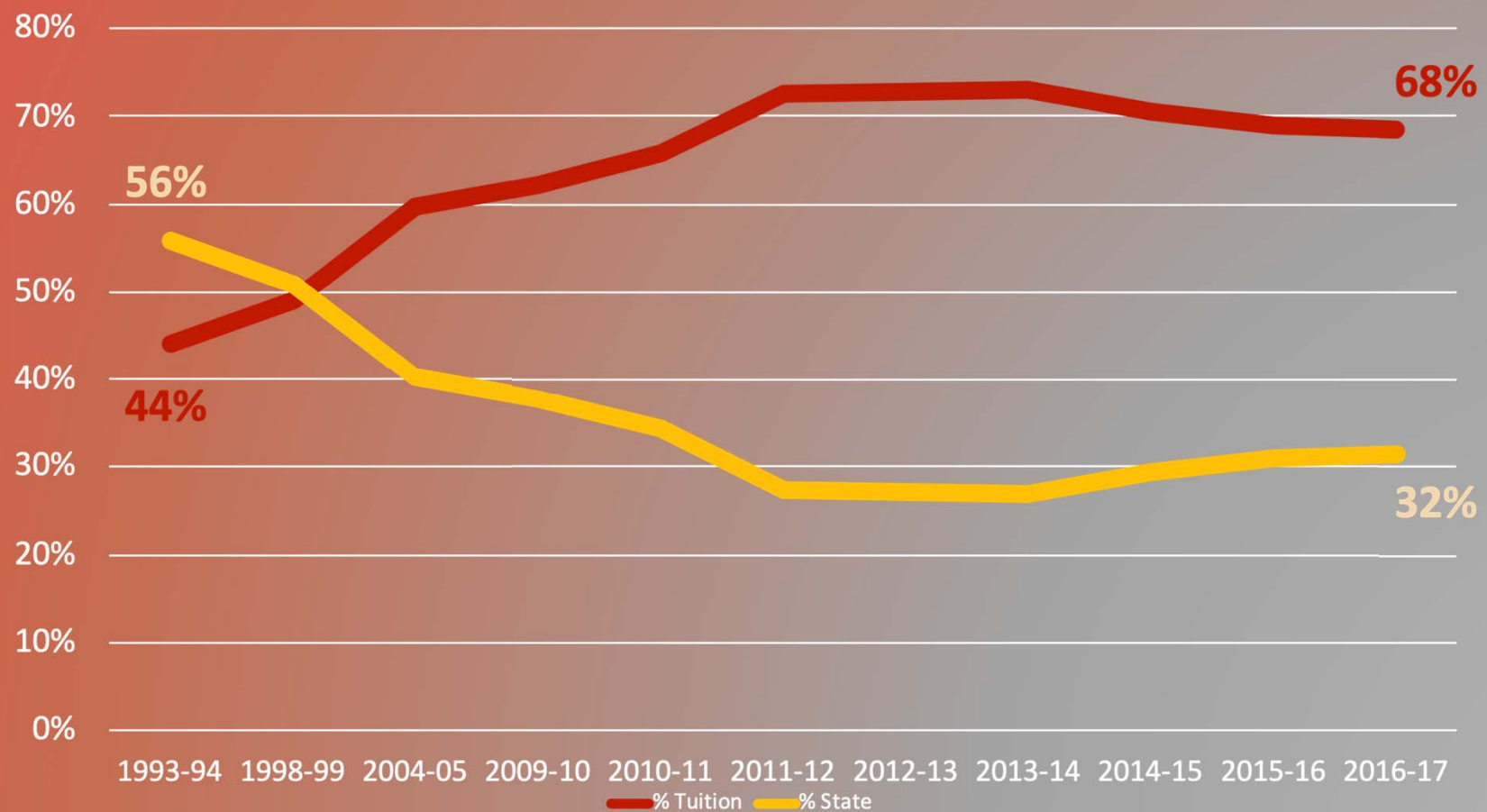
Table 1: Recommended Resident Undergraduate Tuition Rate per PUSF Allocation Scenario

PUSF	PUSF increase from current biennium	Proposed Undergraduate Tuition Rate per credit	Difference Per Credit	Difference Per Term @ 15 Credits	Difference Per Academic Year @ 45 Credits	% Rate Increase
GRB \$737M	\$0	\$201	\$29	\$435	\$1,305	17.0%
\$757M	+20M	\$198	\$26	\$390	\$1,170	15.0%
\$777.5M	+40.5M	\$195	\$23	\$345	\$1,035	13.5%
\$797M	+60M	\$193	\$21	\$315	\$945	12.0%
\$817M	+80M	\$191	\$19	\$285	\$855	11.0%
\$837M	+100M	\$189	\$17	\$255	\$765	10.0%
\$857M	+120M	\$187	\$15	\$225	\$675	8.5%

Tuition and Fee Increases

Tuition Category	Current Credit Rate Per Term	Current Tuition per Academic Year	Proposed Credit Rate Per Term	Proposed Tuition per Academic Year	Increase \$ per Credit	Increase \$ per Academic Year	Increased %
Resident Undergrad	\$172.00	\$7,740.00	\$195.22	\$8,784.90	\$23.22	\$1,044.90	13.5%
WUE	\$250.00	\$11,250.00	\$283.75	\$12,768.75	\$33.75	\$1,518.75	13.5%
Nonres Undergrad	\$526.00	\$23,670.00	\$552.30	\$24,853.50	\$26.30	\$1,183.50	5.0%
Resident Grad	\$430.00	\$15,480.00	\$488.05	\$17,569.80	\$58.05	\$2,089.80	13.5%
Nonres Grad	\$538.00	\$19,368.00	\$564.90	\$20,336.40	\$26.90	\$968.40	5.0%
Masters - Education	\$369.00	\$13,284.00	\$418.82	\$15,077.52	\$49.82	\$1,793.52	13.5%
Mandatory Fees							
Student Incidental	\$345.00	\$1,035.00	\$360.00	\$1,080.00	\$15.00	\$45.00	4.35%
Student Rec Center	\$95.00	\$285.00	\$95.00	\$285.00	\$0.00	\$0.00	0%
Student Health Services	\$140.00	\$420.00	\$143.00	\$429.00	\$3.00	\$9.00	2.14%
Building Fee	\$45.00	\$135.00	\$60.00	\$180.00	\$15.00	\$45.00	33.33%
Composite Mandatory Fees:	\$625.00	\$1,875.00	\$658.00	\$1,974.00	\$33.00	\$99.00	5.28%

Revenues: State Support vs. Tuition





Outcomes-Based Funding

The PUSF funding formula distributes funds based on graduation rates, service to underrepresented, rural, and first-gen students, and high-demand degrees.

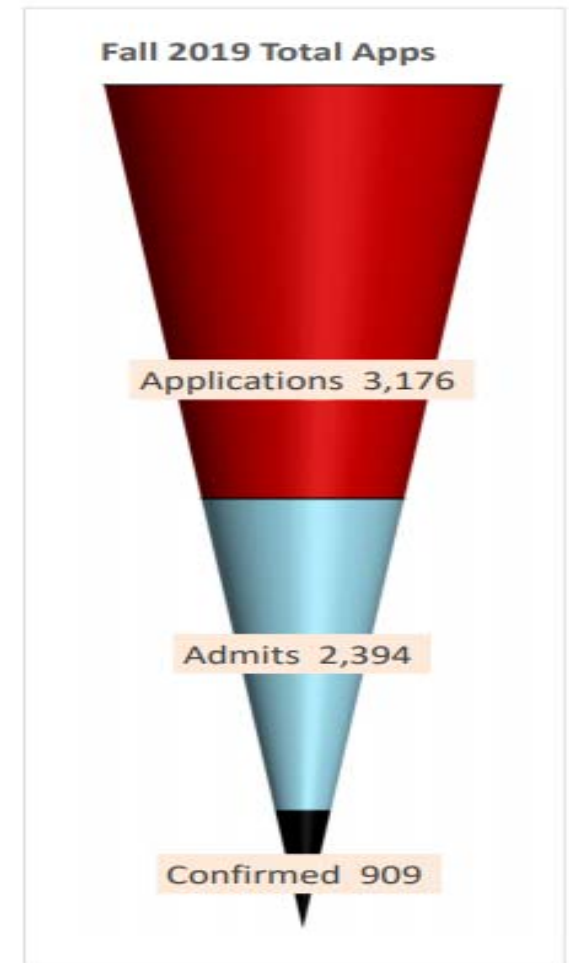
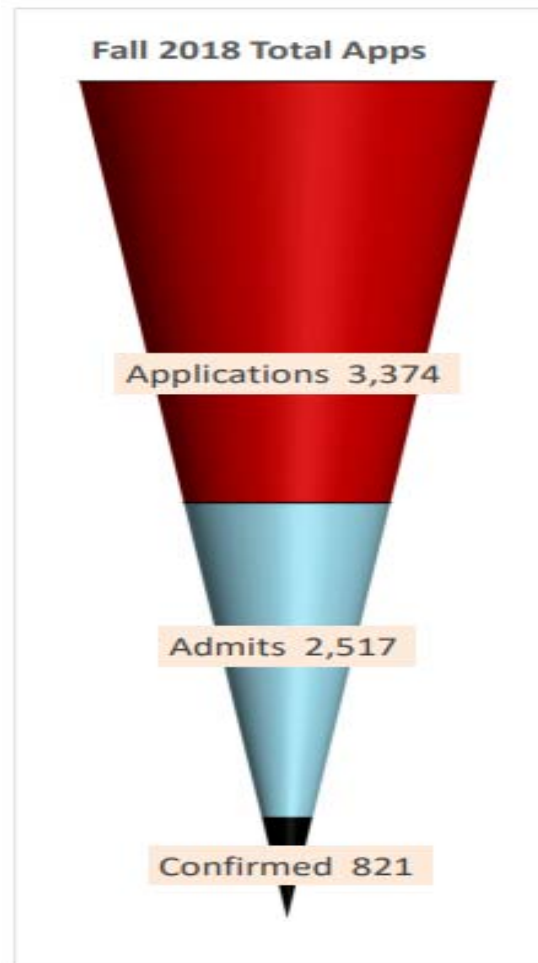
SSCM Allocations at Co-Chair's Budget

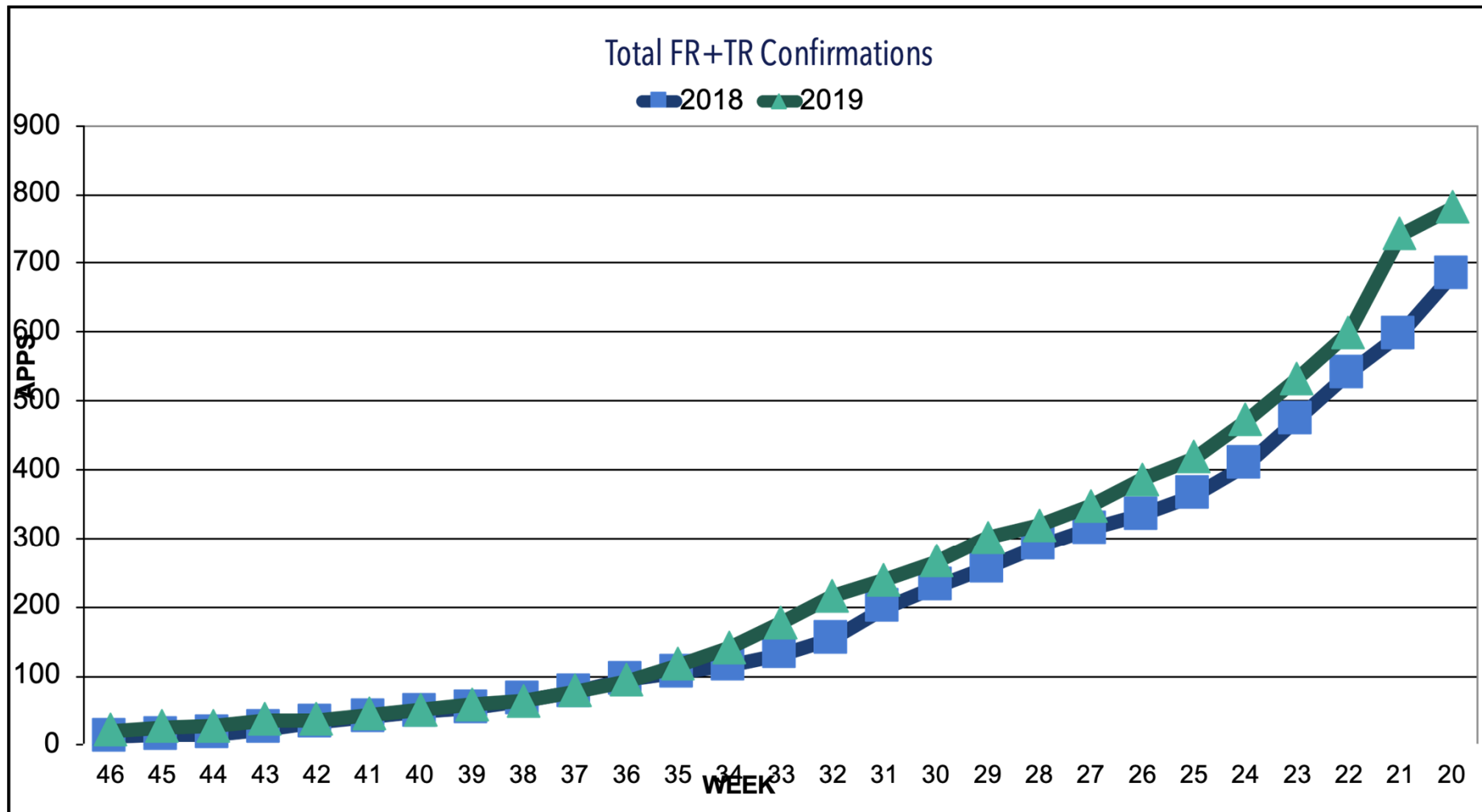
Institution	FY18	FY19	2017-19	FY20	FY21	2019-21	Year-to-Year Difference FY20	Year-to-Year Difference FY21	2019-21 Percent Change
EOU	\$19,898,918	\$20,186,726	\$40,085,644	\$19,980,353	\$20,469,682	\$40,450,035	\$(206,373)	\$489,329	0.91%
OIT	\$26,034,493	\$27,455,306	\$53,489,799	\$27,770,186	\$28,791,807	\$56,561,993	\$314,880	\$1,021,621	5.74%
OSU	\$114,798,771	\$121,751,891	\$236,550,662	\$124,519,399	\$130,287,438	\$254,806,837	\$2,767,508	\$5,768,039	7.72%
PSU	\$87,900,756	\$91,390,178	\$179,290,934	\$92,705,699	\$96,741,968	\$189,447,667	\$1,315,521	\$4,036,269	5.66%
SOU	\$20,845,008	\$21,270,176	\$42,115,184	\$21,598,730	\$22,474,079	\$44,072,809	\$328,554	\$875,349	4.65%
UO	\$67,773,522	\$69,090,988	\$136,864,510	\$69,273,894	\$71,289,489	\$140,563,383	\$182,906	\$2,015,595	2.70%
WOU	\$23,828,838	\$24,673,012	\$48,501,850	\$25,091,462	\$26,433,822	\$51,525,284	\$418,450	\$1,342,360	6.23%
Total	\$361,080,306	\$375,818,277	\$736,898,583	\$380,939,723	\$396,488,285	\$777,428,008	\$5,121,446	\$15,548,562	5.50%

Criterion	Governor's Recommended Budget	Investment Budget
Funding	\$736.9M (same as FY19-21) 1*	
Affordability	Sharp tuition increases (>12%)	
Cost Controls	Will be required 2*	
Financial Stability	Less Ending Fund Balance	
Access and Equity	Eliminates OR Opportunity Grant after 2019-2020; Cuts OR Promise student funding; Eliminates Sports Lottery funding	
Success	Less funding available for SOU Aid (scholarships for need and/or merit)	
New investments	No dedicated funding	

Criterion	Governor's Recommended Budget	Investment Budget
Funding	\$736.9M (same as FY19-21) 1*	\$856.9M (provides CSL only; work together on 'source')
Affordability	Sharp tuition increases (>12%)	Tuition increase <5%
Cost Controls	Will be required 2*	Avoided
Financial Stability	Less Ending Fund Balance	Stasis
Access and Equity	Eliminates OR Opportunity Grant after 2019-2020; Cuts OR Promise student funding; Eliminates Sports Lottery funding	Doubles OR Opportunity Grant; Funds OR Promise, Outdoor school, and Sports Lottery;
Success	Less funding available for SOU Aid (scholarships for need and/or merit)	Healthy SOU Aid funding; opportunities for innovation
New investments	No dedicated funding	Funds innovation (\$10M), campus safety (\$15M), outreach (\$2.6M) and youth employment (\$15M)

Enrollment Projections Funnel Report, Week 20





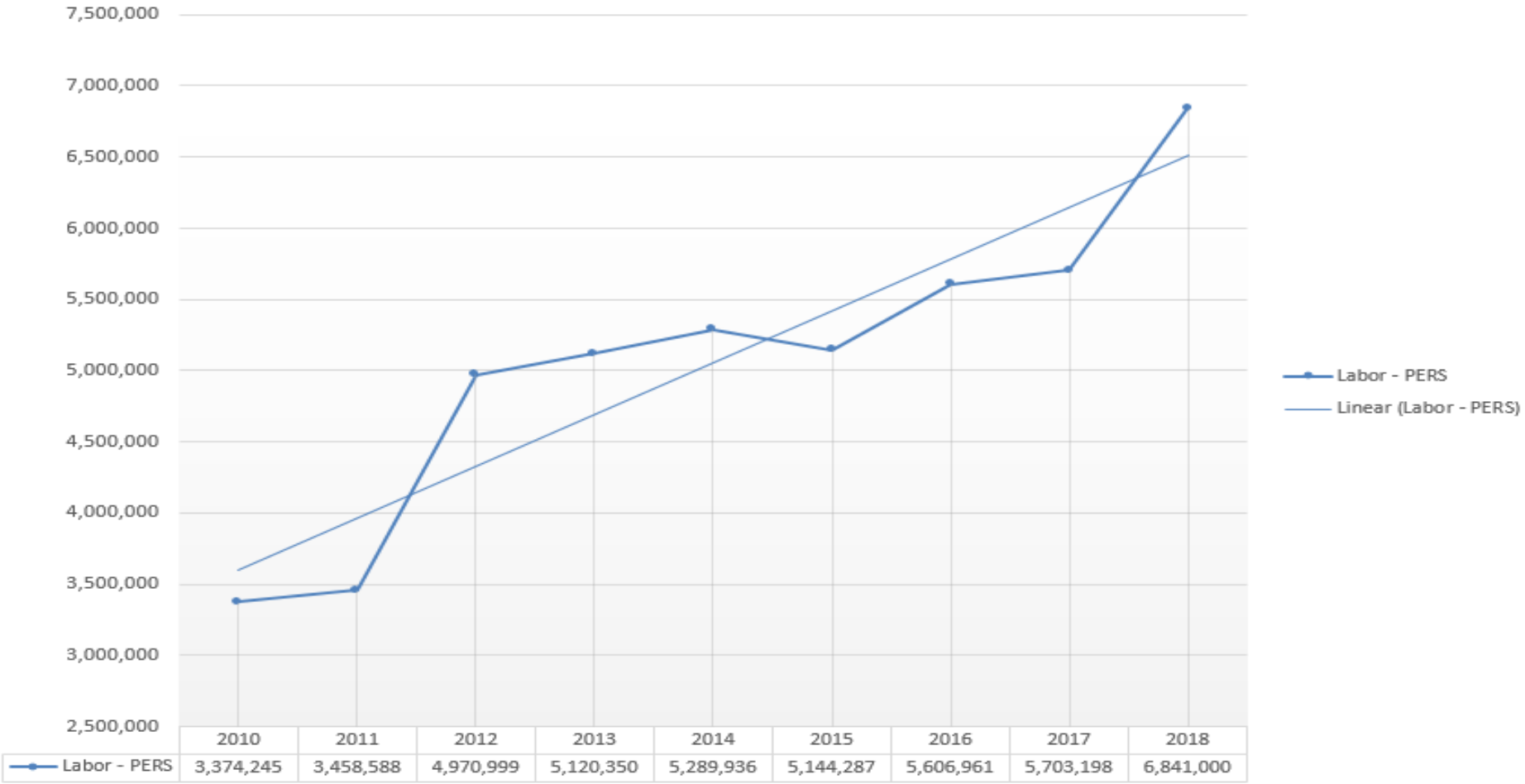
Education



General Fund

Cost Drivers

10yrs PERS Costs



Cost Driver	Projected FY20 Cost	Notes
Faculty, Staff and Admin Salary & Wages	\$984,000	For employees paid with E&G funds only
Medical Costs	\$372,000	Assumed annual increase of 5% Positive note: Current FY19 experienced NO Growth primarily due to employees opting for less expensive plan
Retirement Costs	\$629,000	Based on new PERS rates releases by PERS board in Fall 2018
Institutional Expenses	\$288,000	Increases to utilities, insurance, debt for buildings, assessments and leases
Minimum Wage Increases	\$74,000	Increases per State of Oregon to \$11.25/hr
Total Projected FY20 Cost Increases @ GRB \$0:	\$2.35 million	

Cost Driver	FY19 Base	FY20 Cost Increase	FY20 % Increase
Faculty, Staff and Admin Salary & Wages	\$33,203,000	\$984,000	2.9%
Medical Costs	\$7,454,000	\$372,710	5.0%
Retirement Costs	\$7,608,000	\$629,000	8.3%
Institutional Expenses	\$10,849,000	\$288,000	2.7%
Minimum Wage Increases	\$1,576,000	\$74,070	4.7%
Totals:	\$60.7M	\$2.35M	3.87%

Pro Forma – Current Service Level (CSL) provided (From Oct 2018 FAC Meeting)



- Key revenue drivers:
 - To maintain CSL, + \$130M (equates to 8.2% increase)
 - Still models tuition at 5%

- Expense drivers:
 - Same as previous chart

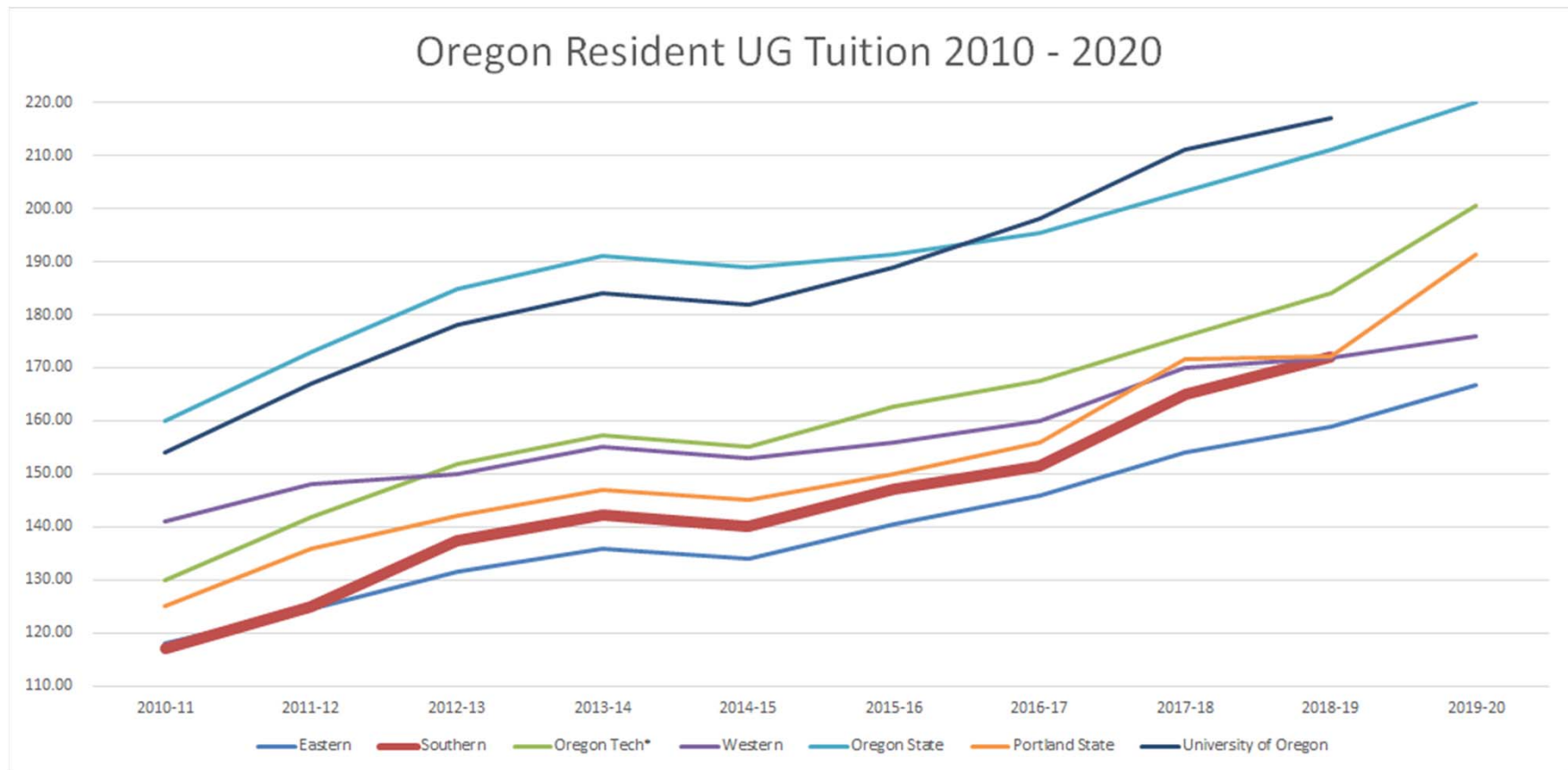
- Intended to shift burden from Students to State

- Closer to legacy 10% goal; but still requires sound financial management in out-years

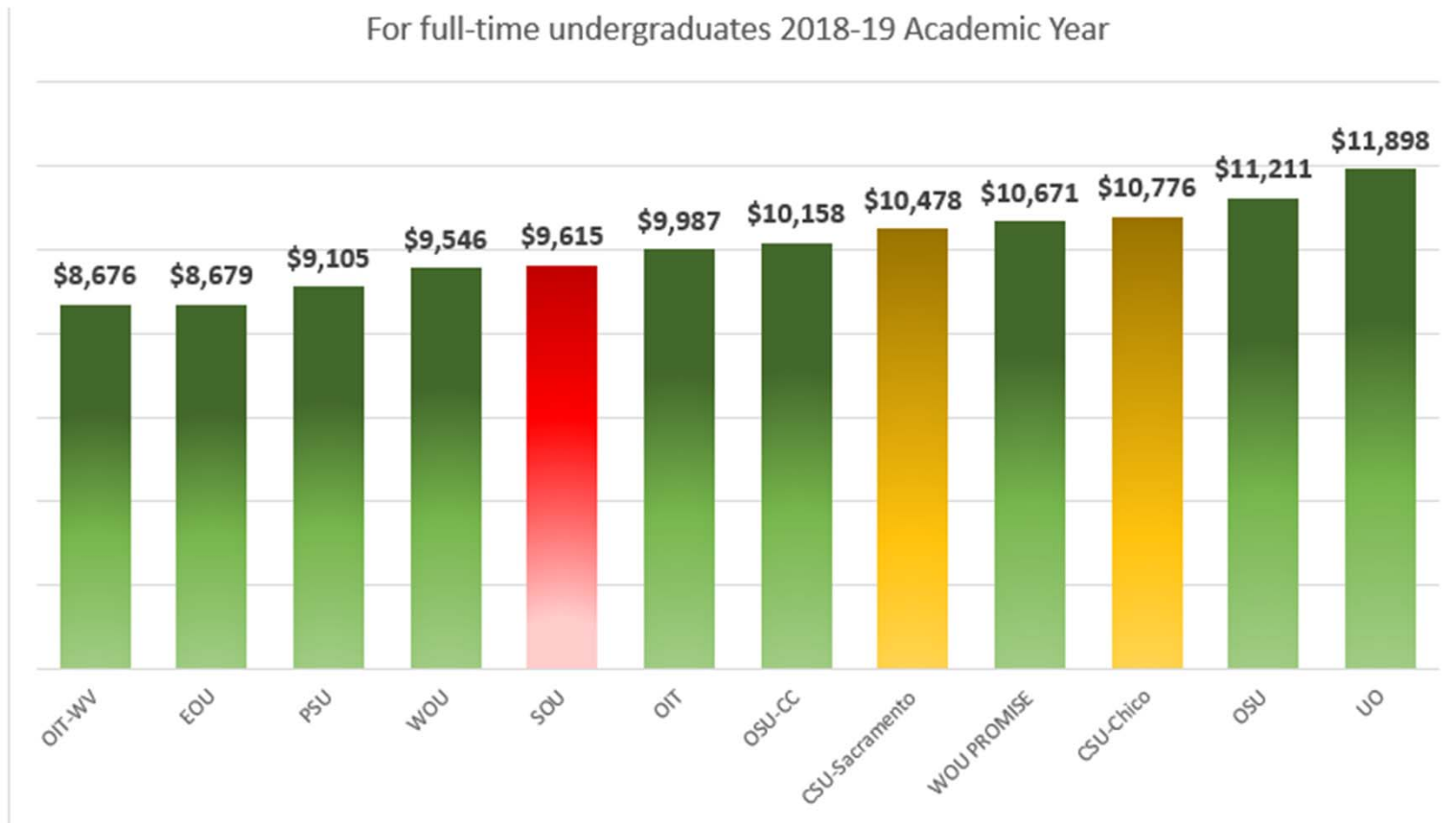
	2017-18			2019-21 Biennium			2021-23 Biennium		
	2017-18 Actual (000's)	2018-19 Prop Budget (000's)	2018-19 FORECAST (000's)	2019-20 FORECAST (000's)	2020-21 FORECAST (000's)	2021-22 FORECAST (000's)	2022-23 FORECAST (000's)	2023-24 FORECAST (000's)	2024-25 FORECAST (000's)
Education and General									
(in thousands of dollars)									
Revenue									
State Appropriations (SSCM)	20,840	21,150	21,270	23,391	24,334	25,621	26,655		
State Appropriations: ETIC/SELP	433	428	381	381	381	381	381		
One-time Funding			32						
Total State Funding	21,273	21,578	21,653	23,771	24,715	26,002	27,036		
Tuition	37,758	42,701	37,671	40,645	42,295	43,748	45,291		
Fees	3,244	3,256	3,783	3,989	4,160	4,364	4,615		
Remissions	(4,242)	(4,142)	(3,767)	(4,064)	(4,229)	(4,375)	(4,529)		
Tuition, net of Remissions	36,760	41,814	37,686	40,570	42,225	43,738	45,376		
Misc. Other Revenue	2,811	2,100	2,100	2,243	2,247	2,219	2,442		
Total Revenues	60,844	65,491	61,469	66,584	69,187	71,953	74,854		
Personnel Services									
Faculty	(14,989)	(15,660)	(15,213)	(15,394)	(16,301)	(16,690)	(17,357)		
Admin	(8,909)	(9,364)	(9,043)	(9,792)	(10,075)	(10,366)	(10,632)		
Classified	(6,436)	(6,665)	(6,532)	(7,031)	(7,418)	(7,826)	(8,257)		
Student (b. Other)	(1,430)	(1,576)	(1,576)	(1,650)	(1,760)	(1,871)	(1,982)		
Labor	(31,763)	(33,265)	(32,364)	(34,408)	(35,555)	(36,794)	(38,228)		
OPE	(17,012)	(18,463)	(18,460)	(19,893)	(20,687)	(21,433)	(22,441)		
Net Personnel	(48,775)	(51,728)	(50,824)	(54,300)	(56,242)	(58,247)	(60,663)		
Supplies & Services	(9,287)	(10,832)	(10,849)	(11,137)	(11,388)	(11,644)	(11,906)		
Total Supplies and Services	(9,287)	(10,832)	(10,849)	(11,137)	(11,388)	(11,644)	(11,906)		
Total Expenditures	(58,062)	(62,560)	(61,673)	(65,437)	(67,630)	(69,891)	(72,574)		
Net from Operations Before Transfers	2,782	2,931	(205)	1,147	1,558	2,068	2,280		
Net Transfers	(2,481)	(2,591)	(1,531)	(2,680)	(2,776)	(2,863)	(2,969)		
Change in Fund Balance	381	281	(1,736)	(1,533)	(1,217)	(801)	(709)		
Beginning Fund Balance	6,844	7,138	7,138	5,342	3,809	2,532	1,731		
Ending Fund Balance	7,145	7,419	5,342	3,809	2,532	1,731	1,082		
% Operating Revenues	11.7%	11.3%	8.7%	5.7%	3.7%	2.5%	1.4%		



SOU In Relation to Oregon Comparators



Current Tuition and Mandatory Fees



*CSU schools contain 12 units of non-resident tuition fee

Raider Aid Helps
Students Afford
College

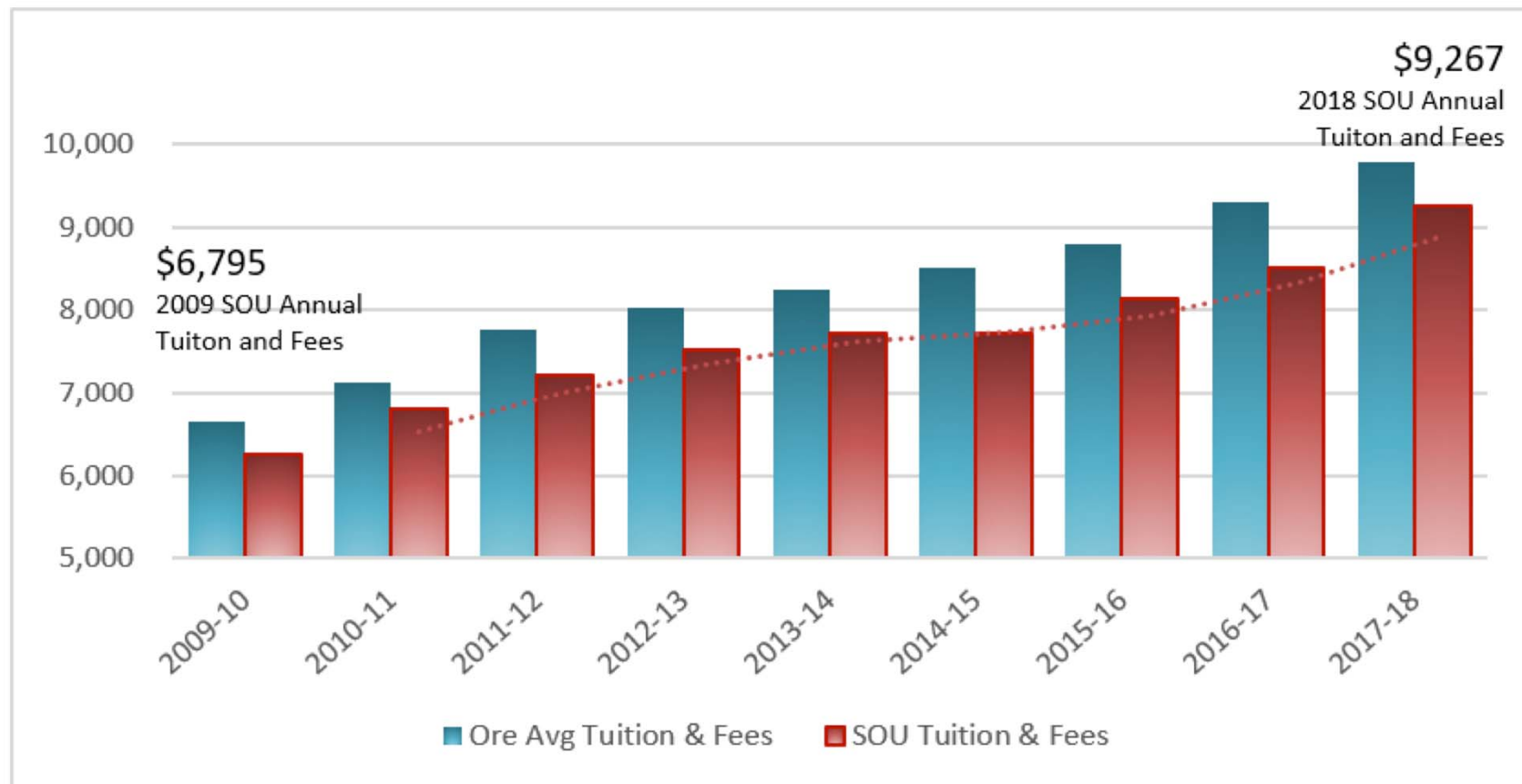
3.6 Million



Regional Picture

	Western Oregon University	Eastern Oregon University	Oregon Institute of Technology	Southern Oregon University
Students w/ Loans	79%	50%	39%	43%
Average Debt at Graduation	\$24,955	\$22,107	\$22,875	\$21,313
Average amount borrowed per year	\$7,403	\$7,357	\$7,843	\$6,939
Default Rate	7%	9.4%	5.5%	8%

SOU: Working Hard to Hold Down Tuition & Fees





Southern Oregon University Financial Aid Office ...

Page Liked · May 8 · 🌐

Did you know that next year a 1920 FAFSA is required for most institutional aid? Now is the time to check up on your Financial Aid Wellness! The doctors are in tomorrow at the SU from 12-1pm to check your FAFSA status. Don't miss out on [#freemoneyfirst](#) [#oneminuteFAFSACheck](#) [#checkingyourfinancialpulse](#)

👍 1

1 Share



Like



Comment



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Write a comment...





Southern Oregon University Financial Aid Office



April 11 · 🌐

The Doctors are IN! Get your [#5minutewellnesscheck](#) RIGHT NOW! Come see us in the SU, jammin' next to the Hawaii Club until 130pm
[#makingfinaidawesome](#) [#finaidsuperheroes](#)



Kristen Gast and 6 others

1 Share

we need your input!

Be part of the conversation
about tuition at SOU.



Southern Oregon University

Published by Shanztyn Nhipali [?]

Page Liked · May 2 ·



Hey Raider Fam! Are you staying up-to-date with the tuition conversation on campus? The Tuition Advisory Council (TAC) helps SOU Administrators work through the complexities of Higher Education's funding and budgeting system. Find more information on their latest conversations and meeting times here: <http://bit.ly/SOUTuition>

[Student Life at Southern Oregon University](#)

Tag Photo

Add Location

Edit

Nicolle Aleman

Like

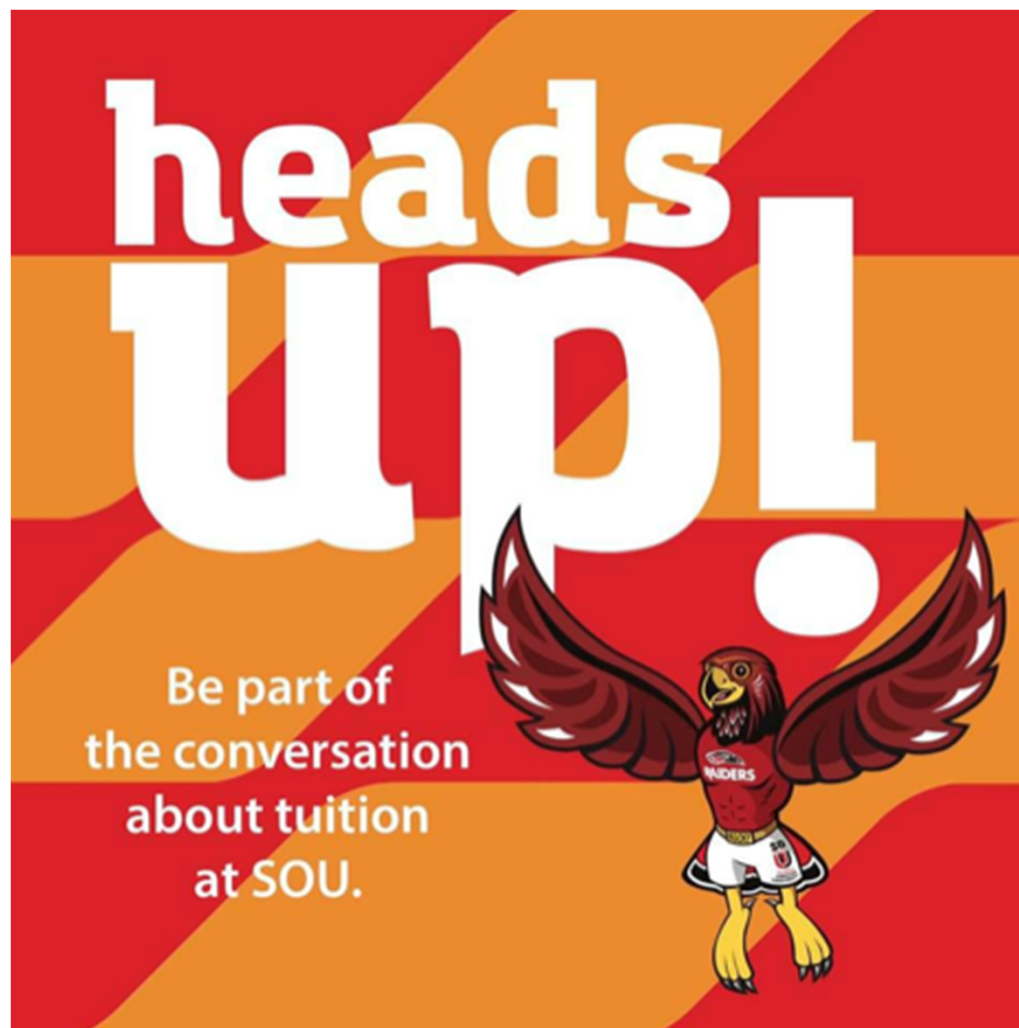
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Write a comment...





Southern Oregon University

Published by Nicole Aleman (7)

Page Liked · March 4 ·

We're talking tuition at SOU! Did you know that there is a Tuition Advisory Council comprised of students, staff, and faculty? Tune into the TAC conversation and watch for calls to add your voice to the conversation! We'll keep you posted here as well. <https://sou.edu/president/tuition-advisory-council/>

Tag Photo Add Location Edit

2

3 Shares

Like Comment Share



Write a comment...



A Comparison of Managers per 1,000 Students

Rank	Institution	Full-Time Managers per 1,000 Students	Spending on Managers' Salaries per Student
301	U. of Oregon	8.5	\$1,130
316	Oregon State	8.2	\$1,145
506	Eastern Oregon	4.8	\$451
570	Oregon Tech	3.5	\$355
586	Western Oregon	3.2	\$349
614	Portland State	2.5	\$339
681	Southern Oregon	1.1	\$157



2013

E&G Spending per FTE \$10,263



NOTE: This slide update
with corrections 5/20/19

2014

E&G Spending per FTE \$10,857



2015

E&G Spending per FTE \$10,005



2016

E&G Spending per FTE \$12,952



2017

E&G Spending per FTE \$12,853







Accelerated Baccalaureate Program

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Graduate in Three Years Instead of Four!

Jackson/Josephine Pledge Program

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Southern Oregon University – Pledge Program

Calling all Jackson/Josephine County High School Seniors: there's a brand new program at Southern Oregon University just for you!

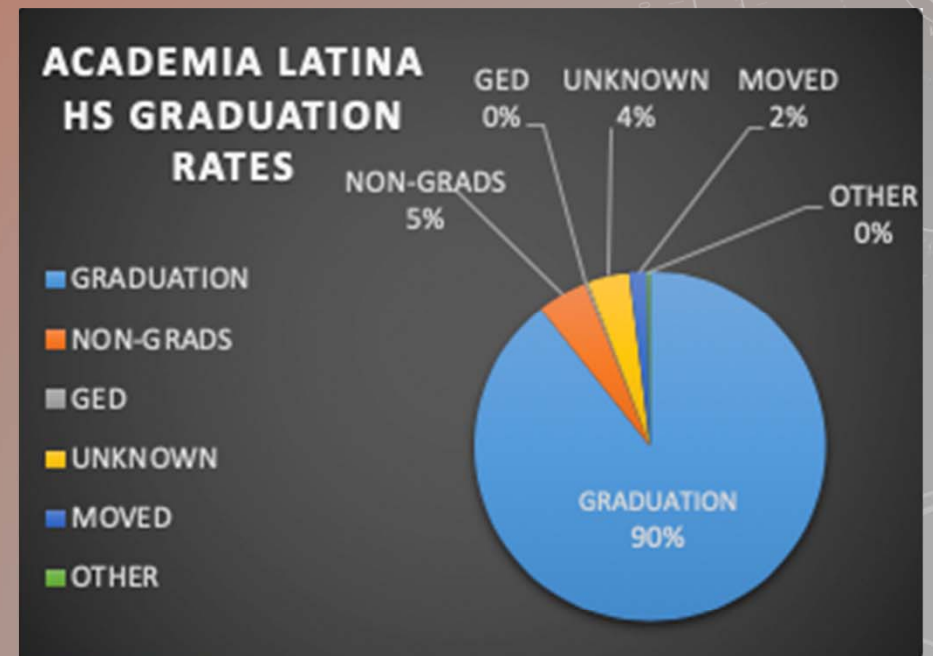
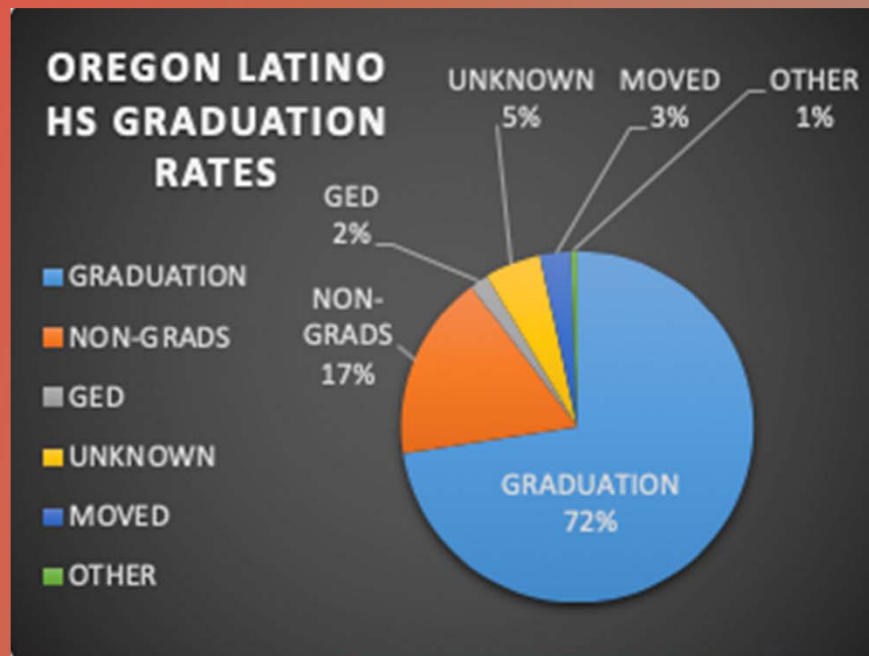
SOU Foundation

6.5 Million New
Scholarship
Funding

23 New Scholarship
Endowments

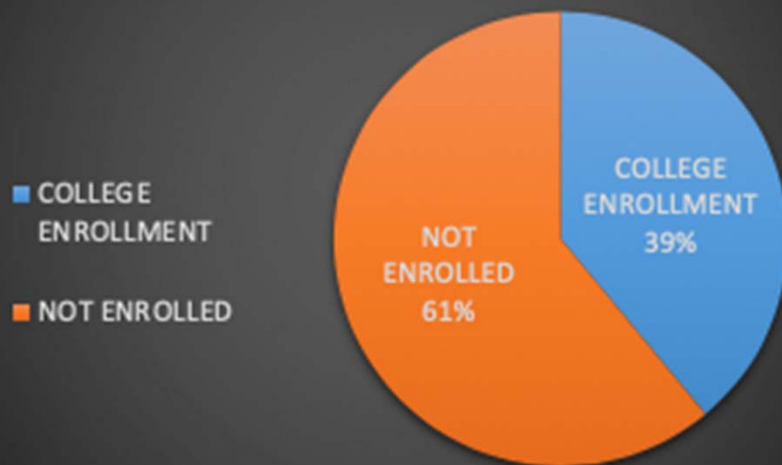


Successful Pipeline Programs

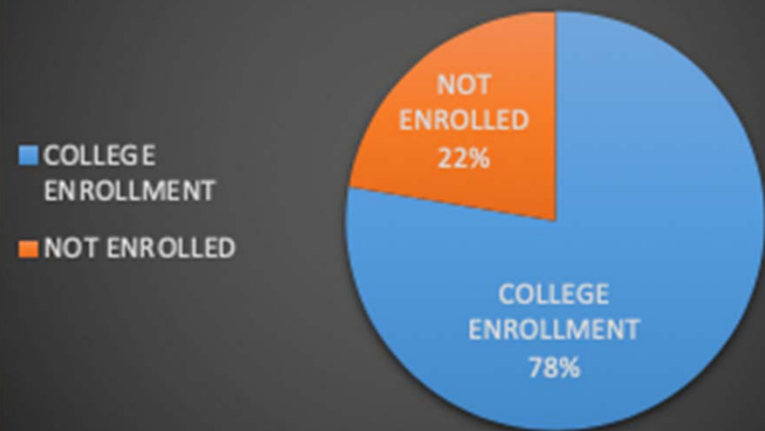


Successful Pipeline Programs

OREGON LATINO COLLEGE ENROLLMENT



ACADEMIA LATINA STUDENTS COLLEGE ENROLLMENT



Goals 1 through 22 included in filter below.

Strategic Planning Overview

FILTERS

Strategic Goal

Multiple selections

Assessment Years

Multiple selections

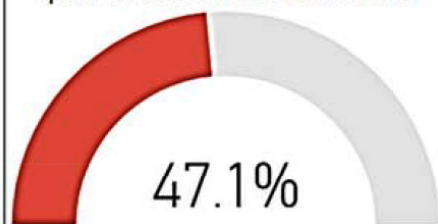
30

Objectives

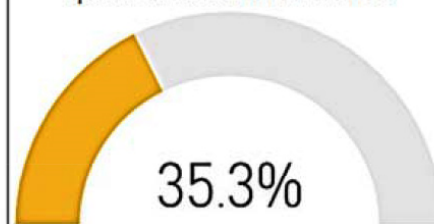
51

Specific Assessments

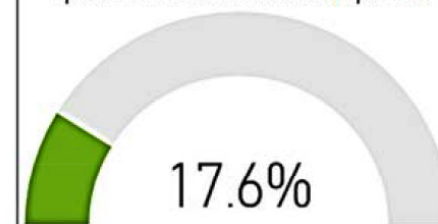
Specific Assessments: Not Started



Specific Assessments: Started



Specific Assessments: Completed



29

Academic Program Outco...

30

Support Program Outcom...

Programs with Outcomes Mapped to Selected Strategic Goal

Program

Program - Library Instruction - Information Literacy
Program - Master in Clinical Mental Health Counseling (MA/MS)
Program - Master in Education (MA/MS)
Program - Master in Interdisciplinary Studies
Program - Mathematics (BA/BS)
Program - Native American Studies (certificate and stand alone minor)
Support - DMC Community/Gov Access
Support - FMP Sustainability/Recycling
Support - Human Resources
Support - Institutional Research

Outcomes Mapped to Selected Strategic Goal

Outcome Name

Outcome

	KVTV, work with community partners and non-profit organizations to develop content that benefits the community, student involvement, responsible citizenship, etc.
Critical Thinking/Problem Solving	CS graduates apply problem-solving techniques to a variety of problems to develop algorithms that can be encoded to produce solutions.
Data Visualization	Produce descriptive reports, charts, and graphs to be included as evidence and support of data analyses.
Direct Support	Provide direct support, services and appropriate referrals to students who utilize the center.
Educate for sustainability and social justice	Students are able to identify and explain current issues in environmental, social, and economic sustainability and justice.





President's Recommendation

TAC: Recommendation to President

Table 1: Recommended Resident Undergraduate Tuition Rate per PUSF Allocation Scenario

PUSF	PUSF increase from current biennium	Proposed Undergraduate Tuition Rate per credit	Difference Per Credit	Difference Per Term @ 15 Credits	Difference Per Academic Year @ 45 Credits	% Rate Increase
GRB \$737M	\$0	\$201	\$29	\$435	\$1,305	17.0%
\$757M	+20M	\$198	\$26	\$390	\$1,170	15.0%
\$777.5M	+40.5M	\$195	\$23	\$345	\$1,035	13.5%
\$797M	+60M	\$193	\$21	\$315	\$945	12.0%
\$817M	+80M	\$191	\$19	\$285	\$855	11.0%
\$837M	+100M	\$189	\$17	\$255	\$765	10.0%
\$857M	+120M	\$187	\$15	\$225	\$675	8.5%

Undergraduate Cost of Attendance @ 13.5% Increase

Tuition		Current/Term	Curr/AY	Prop/AY	Inc \$/AY	Inc %
Resident Undergrad	\$	2,580.00	\$ 7,740.00	\$ 8,784.90	\$ 1,044.90	13.5%
Mandatory Fees						
Student Incidental	\$	345.00	\$ 1,035.00	\$ 1,080.00	\$ 45.00	4.35%
Student Rec Center	\$	95.00	\$ 285.00	\$ 285.00	\$ -	0.00%
Student Health Services	\$	140.00	\$ 420.00	\$ 429.00	\$ 9.00	2.14%
Building Fee	\$	45.00	\$ 135.00	\$ 180.00	\$ 45.00	33.33%
Composite Mandatory Fees:		\$ 625.00	\$ 1,875.00	\$ 1,974.00	\$ 99.00	5.28%
Housing/Meals						
Shasta Double	\$	2,816.00	\$ 8,448.00	\$ 8,700.00	\$ 252.00	2.98%
Red Plan	\$	1,917.00	\$ 5,751.00	\$ 5,595.00	\$ (156.00)	-2.71%
Composite Housing/Meals Change:		\$ 4,733.00	\$14,199.00	\$14,295.00	\$ 96.00	0.68%
Total Cost of Attendance						
Resident Undergrad	\$	7,938.00	\$23,814.00	\$25,053.90	\$ 1,239.90	5.21%

Undergraduate Cost of Attendance @ 11% Increase at +\$80M

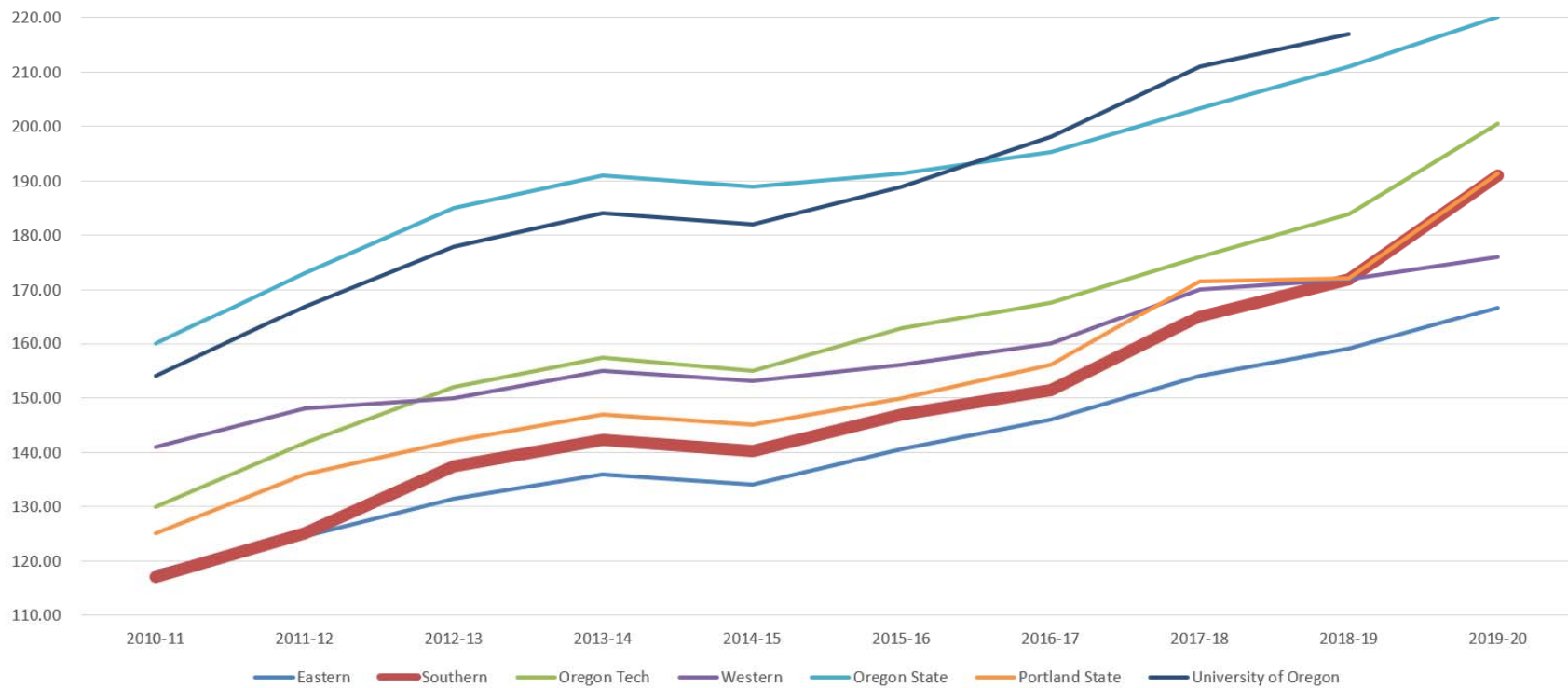
Tuition	Current/Term	Curr/AY	Prop/AY	Inc \$/AY	Inc %
Resident Undergrad	\$ 2,580.00	\$ 7,740.00	\$ 8,591.40	\$ 851.40	11.0%
Mandatory Fees					
Student Incidental	\$ 345.00	\$ 1,035.00	\$ 1,080.00	\$ 45.00	4.35%
Student Rec Center	\$ 95.00	\$ 285.00	\$ 285.00	\$ -	0.00%
Student Health Services	\$ 140.00	\$ 420.00	\$ 429.00	\$ 9.00	2.14%
Building Fee	\$ 45.00	\$ 135.00	\$ 180.00	\$ 45.00	33.33%
Composite Mandatory Fees:	\$ 625.00	\$ 1,875.00	\$ 1,974.00	\$ 99.00	5.28%
Housing/Meals					
Shasta Double	\$ 2,816.00	\$ 8,448.00	\$ 8,700.00	\$ 252.00	2.98%
Red Plan	\$ 1,917.00	\$ 5,751.00	\$ 5,595.00	\$ (156.00)	-2.71%
Composite Housing/Meals Change:	\$ 4,733.00	\$ 14,199.00	\$ 14,295.00	\$ 96.00	0.68%
Total Cost of Attendance					
Resident Undergrad	\$ 7,938.00	\$ 23,814.00	\$ 24,860.40	\$ 1,046.40	4.39%

Updated View of SOU in Relation to Oregon Comparators

Institution	2016-17	2017-18	2018-19	2019-20	AY % Increase
Eastern	146.00	153.95	159.00	166.79	4.90%
Southern	151.46	165.04	172.00	190.92	11.00%
Oregon Tech	167.63	176.01	183.93	200.48	9.00%
Western	160.00	170.00	172.00	176.01	2.33%
Oregon State	195.33	203.33	211.00	220.05	4.29%
Portland State	156.00	171.60	172.23	191.36	11.11%
University of Oregon	198.00	211.00	217.00		

Updated View of SOU in Relation to Oregon Comparators

Oregon Resident UG Tuition 2010 - 2020





Setting Tuition & Fees 2019-2020

**Southern
OREGON
UNIVERSITY**