



OFFICE OF THE BOARD OF TRUSTEES

Public Meeting Notice

May 9, 2019

TO: Southern Oregon University Board of Trustees, Finance and Administration Committee

FROM: Sabrina Prud'homme, University Board Secretary

RE: Notice of Regular Meeting of the Finance and Administration Committee

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

Topics of the meeting will include a vice president's report with a review of the financial dashboard and updates on general topics. There will be discussion and action on the tuition and mandatory fees recommendation for the 2019-20 academic year. There also will be a discussion on the fiscal year 2019-2020 budget.

The meeting will occur as follows:

Thursday, May 16, 2019

2:30 p.m. to 4:00 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.

The Hannon Library is located at 1290 Ashland Street, on the Ashland campus of Southern Oregon University. **If special accommodations are required 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
Finance and Administration Committee Meeting
May 16, 2019

Call to Order / Roll / Declaration of a Quorum



**Board of Trustees
Finance and Administration Committee Meeting**

**Thursday, May 16, 2019
2:30 p.m. – 4:00 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 Sheila Clough |
| | 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 Clough |
| | 2 | Public Comment | |
| 5 min. | 3 | Consent Agenda | |
| | 3.1 | Approval of April 18, 2019 Meeting Minutes | Chair Clough |
| 5 min. | 4 | Vice President's Report | Greg Perkinson, SOU, Vice
President for Finance and
Administration |
| | 4.1 | Committee Dashboard | |
| | 5 | Action, Information and Discussion Items | |
| 60 min. | 5.1 | Tuition and Mandatory Fees for Academic Year
2019-20 (Action) | Dr. Linda Schott, SOU,
President |
| 20 min. | 5.2 | Fiscal Year 2019-2020 Budget Information | Greg Perkinson; Josh
Lovern, SOU, Interim
Budget Program Manager |
| | 5.3 | Future Meetings | Chair Clough |
| | 6 | Adjournment | Chair Clough |

Public Comment

Consent Agenda

Board of Trustees
Finance and Administration Committee Meeting
Thursday, April 18, 2019

MINUTES

Call to Order/Roll/Declaration of a Quorum

Committee Members:

Sheila Clough	Present	Shanztyn Nihipali	Present
Les AuCoin	Present	Bill Thorndike	Present
Shaun Franks	Present	Steve Vincent	Present
Megan Davis Lightman	Present		

Chair Sheila Clough called the meeting to order at 4:00 p.m. in the DeBoer Room of the Hannon Library. Chair Clough welcomed Alexis Phillips, ASSOU President, and Dr. Lee Ayers Preboski, a HECC commissioner. Chair Clough also mentioned Vanessa Becker, a HECC commissioner, would be joining the meeting. The secretary recorded the roll and a quorum was verified.

In reviewing the agenda, Chair Clough announced that agenda items would be taken out of order to accommodate presenters' schedules.

Other attendees included: Dr. Linda Schott, President; Greg Perkinson, Vice President for Finance and Administration; Dr. Susan Walsh, Provost; Janet Fratella, Vice President for Development; Dr. Neil Woolf, Vice President for Enrollment Management and Student Affairs; Jason Catz, General Counsel; Josh Lovern, Budget Office; Andrew Gast, Office of Development; Deborah Lovern, Provost's Office; Lee Ayers Preboski, Undergraduate Studies and HECC; Steve Larvick, Business Services; Susan Dyssegard, Office of Finance and Administration; Johanna Pardo, ASSOU; Max Jenson; Alexis Phillips, ASSOU; Joe Mosley, Marketing and Communications; Hugues Lecomte, Campus Recreation; Anna D'Amato, Student Health and Wellness Center; Staci Buchwald, University Housing; Ryan Schnobrich, Internal Audit; Vanessa Becker, HECC; Beau Belikoff, Budget Office; Sabrina Prud'homme, Office of the Board Secretary; and Kathy Park, Office of the Board Secretary.

Public Comment

There was no public comment.

Action, Information and Discussion Items

2019-20 Student Incidental Fee and Mandatory Fees (Action)

Chair Clough provided background information on the student incidental fee and mandatory fees, including the processes by which they are set and the president's and Board's role in the processes. ASSOU has a recognized process by which the student incidental fee is proposed; that fee is ready for the committee's action. The Tuition Advisory Council (TAC) provides the Board a recommendation on other mandatory fees, which are not yet ready for the committee's action. While the Board is not required to approve the housing fee and meal plans, they are brought forward to provide information on the total cost of attendance.

Greg Perkinson reviewed the mandatory fees: student incidental, student recreation center, student health services and building. ASSOU President Phillips and President Schott jointly recommend a \$15 increase in the student incidental fee, which is a 4.25 percent increase. ASSOU President Phillips said that, anticipating a decrease in enrollment and having a half-million dollar deficit, the recommended fee is the lowest amount that could be charged and still allow ASSOU to fund approved programs, build its reserve, and reduce the deficit; ASSOU is proud of the proposal.

Responding to Chair Clough's inquiry, Josh Lovern explained how the deficit arose: Like the university, ASSOU's budget was based on higher enrollment numbers but their budget did not have a quarterly checkpoint. ASSOU is looking at adjusting its process around fifth week numbers and revenues and adjusting as necessary. Jason Catz added that ASSOU is in the process of reviewing a complete overhaul of the process by which it budgets and how the fee comes to the Board. He said ASSOU should be credited not only for the hard work it has done on this year's recommendation but also with creating a better process.

Responding to Trustee Vincent's inquiry, Mr. Perkinson said the fifth week of each term is when SOU has better certainty regarding enrollment numbers and is a good time to reevaluate costs and revenue. Dr. Neil Woolf added that ASSOU was not doing those pulse checks and the fifth week is an appropriate time to reevaluate, then Student Life can work collaboratively with ASSOU on any necessary adjustments.

Mr. Perkinson said the student recreation center fee will remain flat and most of the fee pays for debt service while the rest pays for the center's operations. The leadership team for student health services assessed the center's revenues and expenses for the last year and recommended a 2 percent increase in the fee, which represents \$3 per term.

Mr. Perkinson said the building fee is a legacy fee that was defined by statute and has been \$45 per term for over two decades. In SOU's enterprise risk management assessment process, a significant risk was identified with end-of-life of network gear, the backbone of SOU's information technology (IT) infrastructure. SOU had an event a few weeks earlier that brought the system down for a short period of time; IT had a spare component from which parts were cannibalized and the system was brought back up. However, there are no spare components left. The methods other schools use to handle technology fees range from having a separate technology fee, having a technology common fund and including it as part of a building fee. Mr. Perkinson proposed handling the recapitalization of the IT infrastructure by adding \$15 per term; this would give SOU the ability to mitigate the risk and ensure a reliable IT system to support academics and students. Responding to Trustee AuCoin's inquiry, Mr. Perkinson said \$15 per term was the most he wanted to assess initially, although the bill to pay is more than this will generate. This increase gets SOU started in the right direction with some initial seed money to replace the worst first.

Responding to Chair Clough's inquiry, Mr. Perkinson said the building fee was prescribed by the Oregon University System and carried through until the independent governing boards were allowed to set the fee.

Chair Clough reiterated that ASSOU President Phillips and President Schott recommend the student incidental fee and that the student recreation center, student health services and building fees go through the TAC. Mr. Perkinson said all the fees were presented to the TAC the preceding day for situational awareness and discussion. The TAC will vote on the fees the following week.

Mr. Perkinson reviewed the various changes in housing and meal plans, as included in the meeting materials. There is a nominal bump (around 3 percent) in the room component and a decrease in the meal plans. Staci Buchwald, the Housing Director, and A'viands, worked together to roll the cost of meal plans back to a 2016 level and added a new, lower cost meal plan. Chair Clough reminded the committee members of the extensive overview Ms. Buchwald provided at a previous meeting. Responding to Trustee Vincent's inquiry regarding the increase in housing rates and the decrease in the cost of meal plans, Mr. Lovern said there is a net .68 percent increase, on average, for students living in student housing.

Chair Clough explained the choice the committee had before it. The committee could approve the student incidental fee because it has been through the appropriate process. Alternatively, the committee could postpone action on the student incidental fee until the next meeting on May 16 when tuition rates will be set. Seeing no downside to moving approval of the student incidental fee at the meeting, the committee members agreed to take action. Trustee Thorndike added that any certainty the committee could set in place at the meeting would benefit the institution and students. Trustee Lightman moved to approve the student incidental fee for recommendation to the full board. Trustee Vincent seconded the motion and it was approved unanimously.

Consent Agenda

Trustee Thorndike moved to approve the consent agenda, as presented. Trustee Franks seconded the motion and it passed unanimously.

Vice President's Report

Committee Dashboard

Greg Perkinson reviewed the financial dashboard included in the meeting materials. The good news is that Supplies & Services expenses are nearly on par with the burn rate, compared to being slightly above last month.

Mr. Perkinson said he has been working with athletics, the budget office, the controller, the Service Center, and Dr. Woolf on a methodology to understand the history, current expenses, and future forecast to better advise President Schott on a balance of transfers in and out of the Education & General fund for athletics. He will show the committee the outcome of that work in a future meeting.

Other General Updates

Mr. Perkinson summarized the discussions from the last HECC meeting. He said the chair gave a summary of the 10-year strategic plan; President Michael Schill talked about challenges at the University of Oregon; and Ben Cannon talked about dialogue with the Ways and Means Committee. Mr. Perkinson said he and Jim Pinkard discussed the HECC's tuition criteria evaluation and whether there will be a standardization of the financial review or if it would be unique to each institution. Mr.

Pinkard said the HECC would focus on the uniqueness of each institution as it made its assessment.

Responding to Trustee Lightman's inquiry, Mr. Perkinson said none of the universities are meeting all five of the HECC's financial ratios. President Schott added that SOU will have its biennial HECC review in the following year, so SOU needs to have an eye on its health in the long term not just the immediate term. President Schott stressed that SOU routinely looks out several years to see how today's decisions impact the next biennia as well as future biennia.

Action, Information and Discussion Items (Continued)

Update on Tuition and Fees for 2019-20 Academic Year

Greg Perkinson said the TAC reconvened after finals week and spring break. The meeting started with a legislative update. The TAC was reminded that timing this year is abnormal due to the legislative session. The TAC also reviewed student fees.

To get a sense of how each member felt about potential tuition increases, the TAC took a "straw poll" among the voting members present. At that time, three members supported an increase under 5 percent; three would support an increase between 5 and 7 percent; and none supported an increase of 0 percent nor over 7 percent. At the next TAC meeting, the members will review the pro forma and discuss the net effect of certain increases. Dr. Walsh later stated that the TAC members thought several recommendations on tuition increases would be appropriate.

At Chair Clough's request, Mr. Perkinson mentioned the communication plan that details efforts to get students and the rest of campus involved, and to raise awareness of the tuition setting process. This includes open forums, social media infographics, developing communication messages for students to take to Salem, and the TAC's website. Trustee Lightman acknowledged the immense effort staff has made to disseminate information and asked how students are receiving the message. ASSOU President Phillips said she did not know but that ASSOU is being intentional in its communications to avoid any miscommunications; there has been a high level of communication and the reception to that has been great. At the last open forum, a number of students were present, the students are more engaged than in previous years, and the message is being received pretty well.

Replying to Trustee AuCoin's inquiry, Mr. Catz said SOU's TAC predates House Bill 4141 but the bill provides guidance on the TAC's role in the tuition setting process. He then detailed the process the TAC will follow in making its recommendation on the tuition rate and the Board's and the HECC's roles in the process.

Update on 2019-21 State Funding

Greg Perkinson said the co-chairs of the Ways and Means Committee have identified \$40.5 million that is additive to the \$737 million of the current biennium. He said there has been no success in getting higher education added to the \$2 billion revenue package. Jeanne Stallman said the strong push to include higher education in the revenue package has helped build support for funding. Mr. Perkinson described the tuition rate increases and budget reductions some of the other universities have announced or are contemplating.

Trustee AuCoin asked for examples of the actions SOU would take if it had to make \$1 million in cuts. Dr. Susan Walsh mentioned that significant cuts were made in 2014 and further cuts would necessitate very careful conversations. President Schott added that she hoped SOU would not reach that point. Referring to the *Current Budget Reduction Matrix* in the meeting materials, with an increase of \$80 million in funding and keeping tuition at 5 percent, SOU would have to make \$3.4 million in budget cuts to retain a 10 percent ending fund balance. Such cuts would be significant for SOU. If SOU had to take that on, President Schott said her goal would be to protect the core of the institution as much as possible (e.g., academic programs and student support services), then look beyond that to identify other opportunities for doing business differently. However, cuts may have to be made to the core of the institution as well. Cuts of that magnitude would not leave SOU unharmed and may be the start of a downward spiral.

Discussion ensued on legislators' perceptions and awareness of the impact the proposed budget will have on the smaller institutions; the disparate impact of the funding formula; and transparency and accountability. Chair Clough stressed the importance of articulating the work SOU has done over the past few years to manage expenses and to be a healthy institution.

Preliminary Baseline Budget Information

Greg Perkinson and Mr. Lovern explored various scenarios using the interactive pro forma, varying tuition rate increases, levels of state funding, enrollment figures and ending fund balances.

Explaining why SOU is concerned about the ending fund balance, Chair Clough emphasized that it is not to fill the coffers at the expense of students or employees but the reality is that it helps the institution weather the storms. If an institution does not have a fund balance, it cannot weather a storm, cannot grow, cannot make strategic investments. President Schott added that SOU is very carefully making strategic investments to strengthen the financial sustainability of the institution for the long run by enhancing student success. She stressed the importance of enrollment and mentioned some of the steps SOU has taken to increase those numbers.

Future Meetings

The next regularly scheduled committee meeting will be on May 16.

Adjournment

Chair Clough adjourned the meeting at 5:45 p.m.

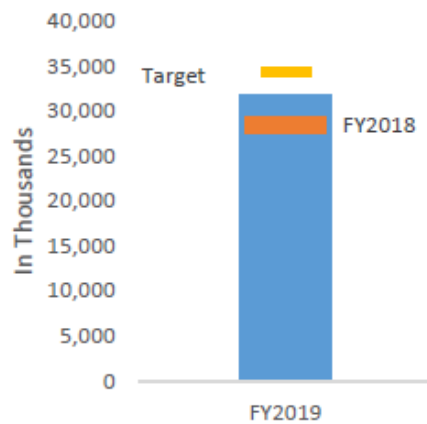
Vice President's Report

Financial Dashboard

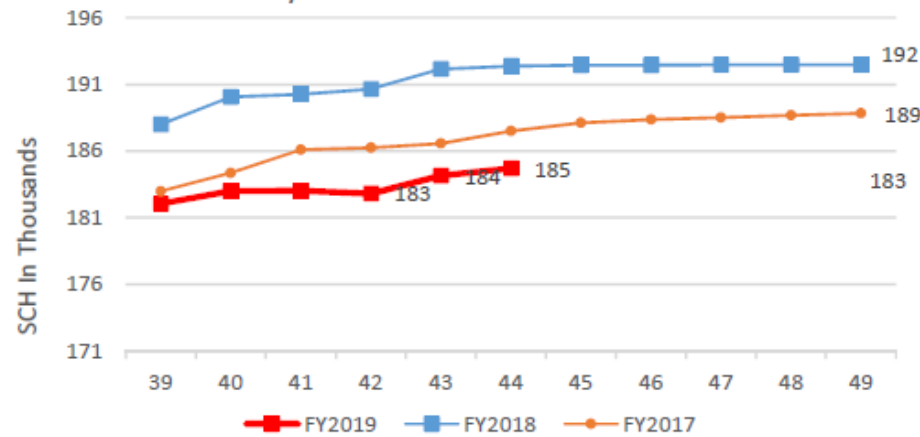
For FY19

As of April 30, 2019 prior to close

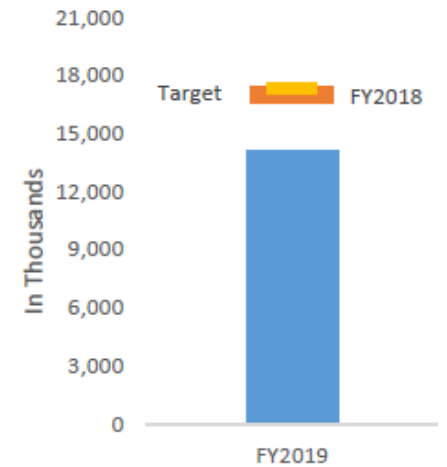
Public University Funds Operating Cash



Total Student Credit Hours by Week of the Fiscal Year

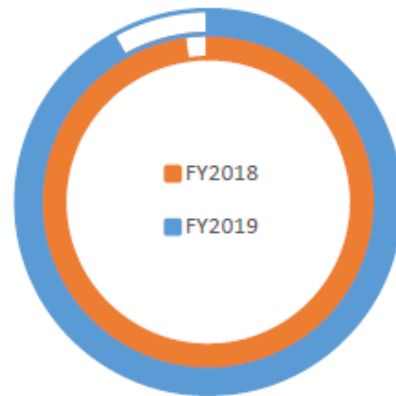


E&G Fund Balance

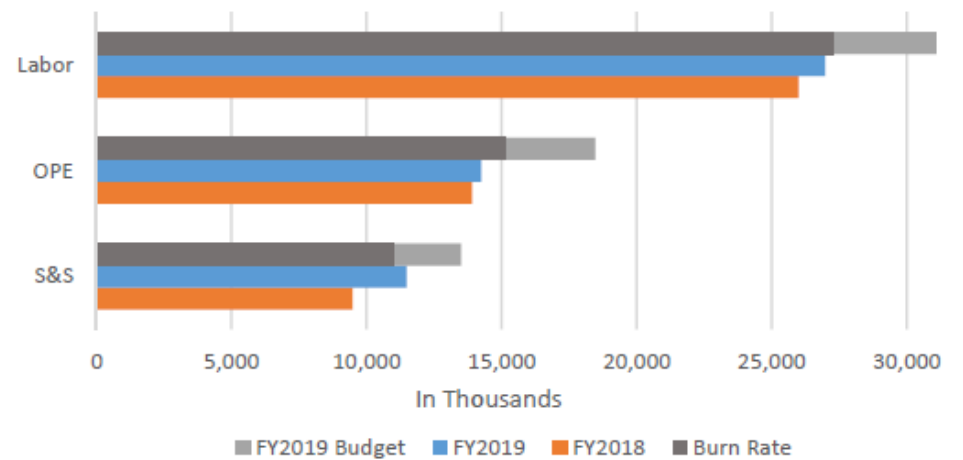


Final push to build the FY20 Budget

E&G YTD Revenues



E&G YTD Select Expenses



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	40,645	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	71,959	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

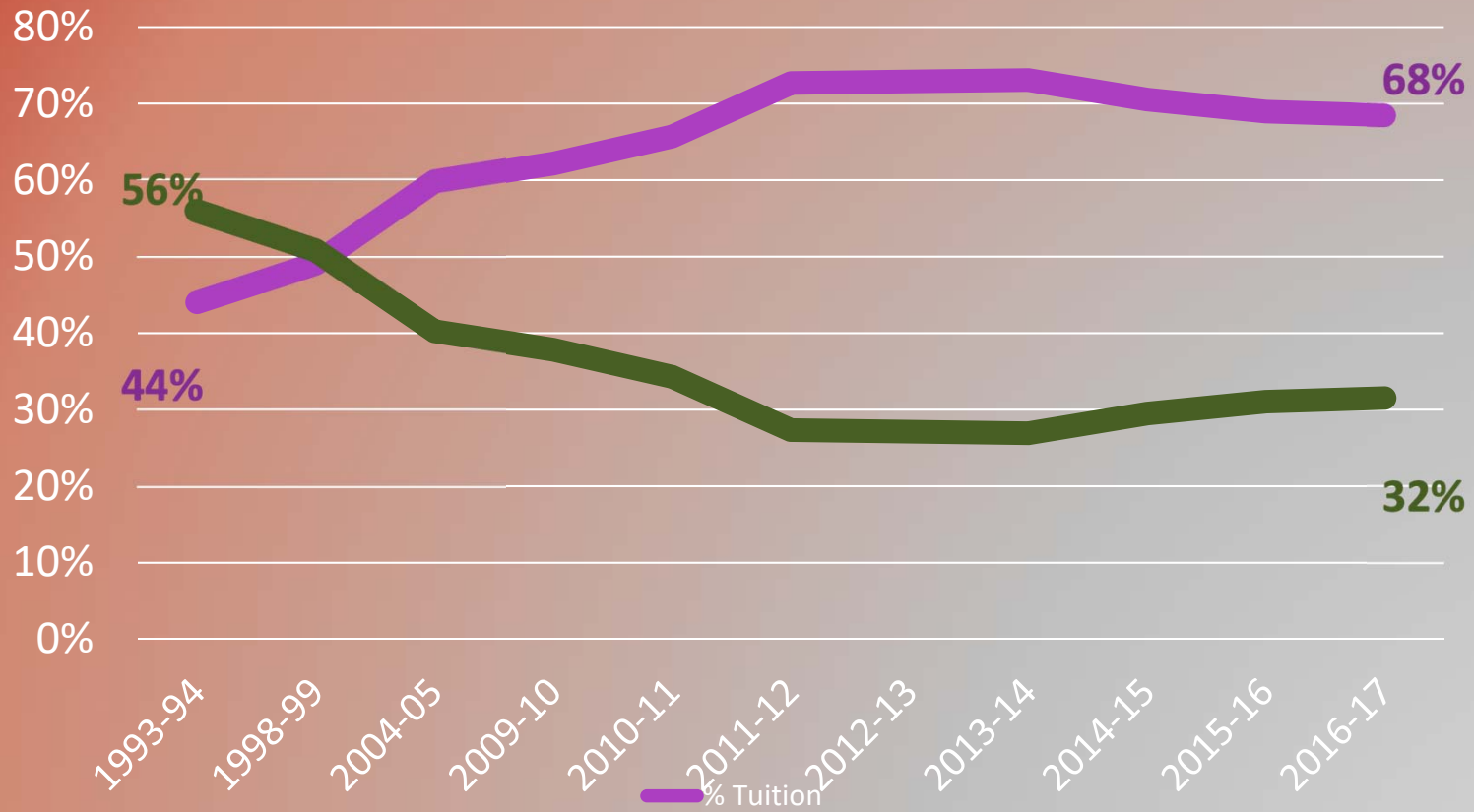
Ideally

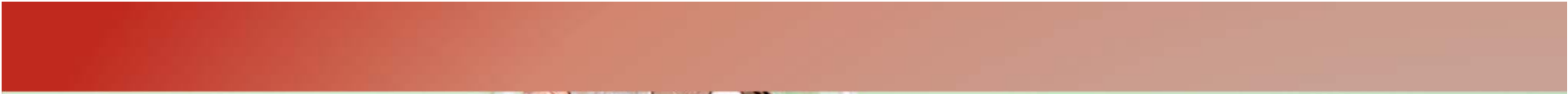




Reality

Revenues: State Support vs. Tuition





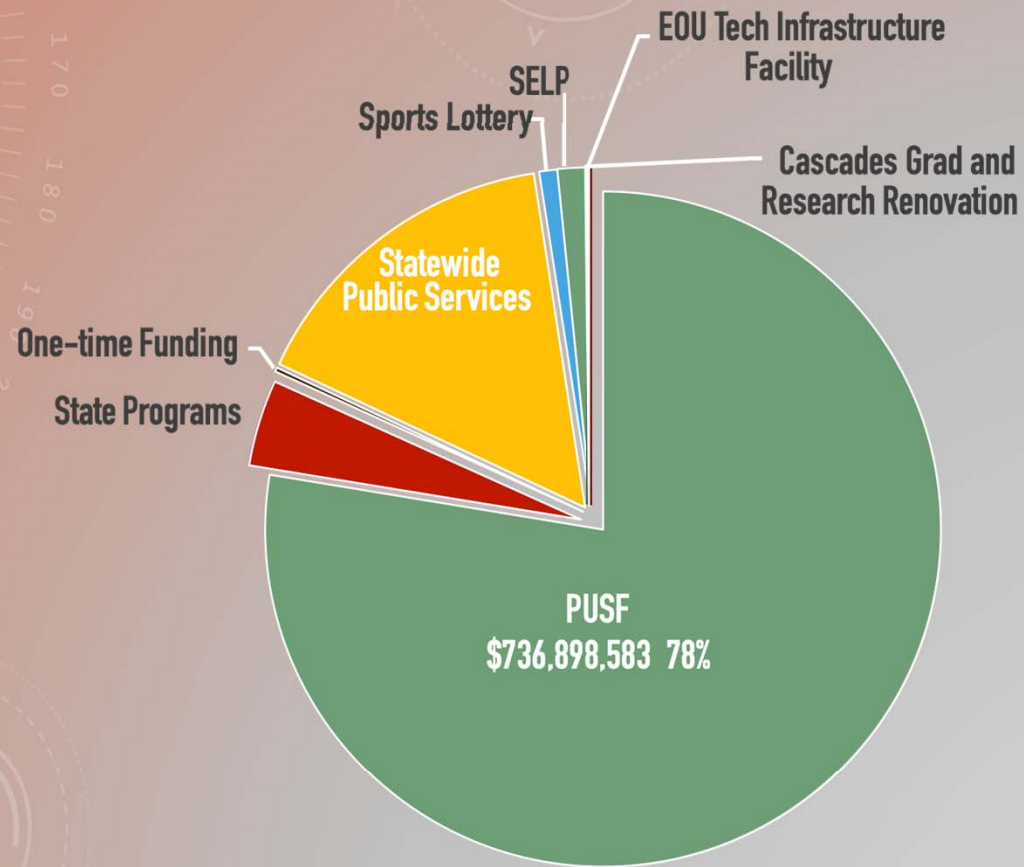


Expenses	Revenues
Personnel	State Allocations
Other Personnel Expenses (OPE)	Tuition Revenue
Supplies and Services	Fees



2017-19

Public University Funding



*Revenue Source:
State Allocation*

Legislature Allocates
Funds to PUSF



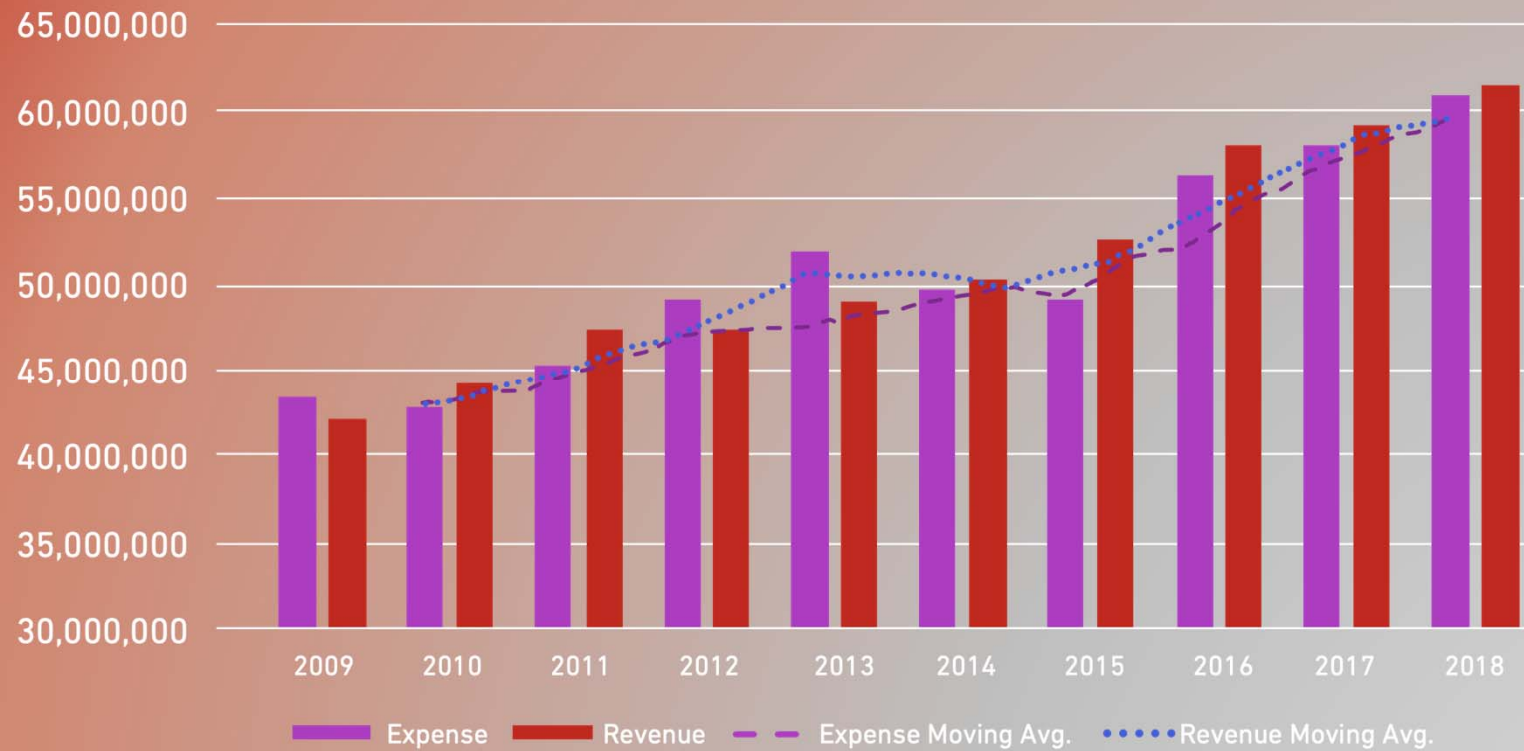
SO Southern OREGON
U UNIVERSITY

SOU State
Funding Based
on SSCM

HIGHER
EDUCATION
COORDINATING
COMMISSION



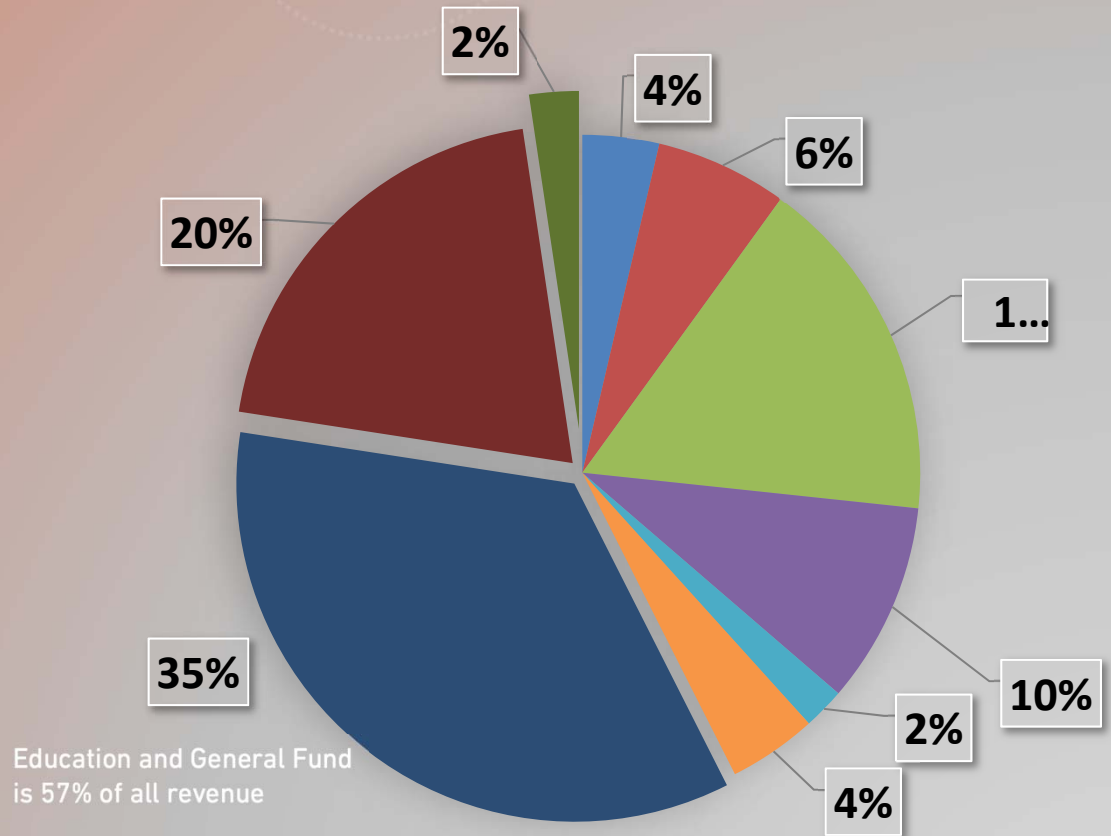
Revenue and Expense with Moving Average





All Sources of Revenue—2018

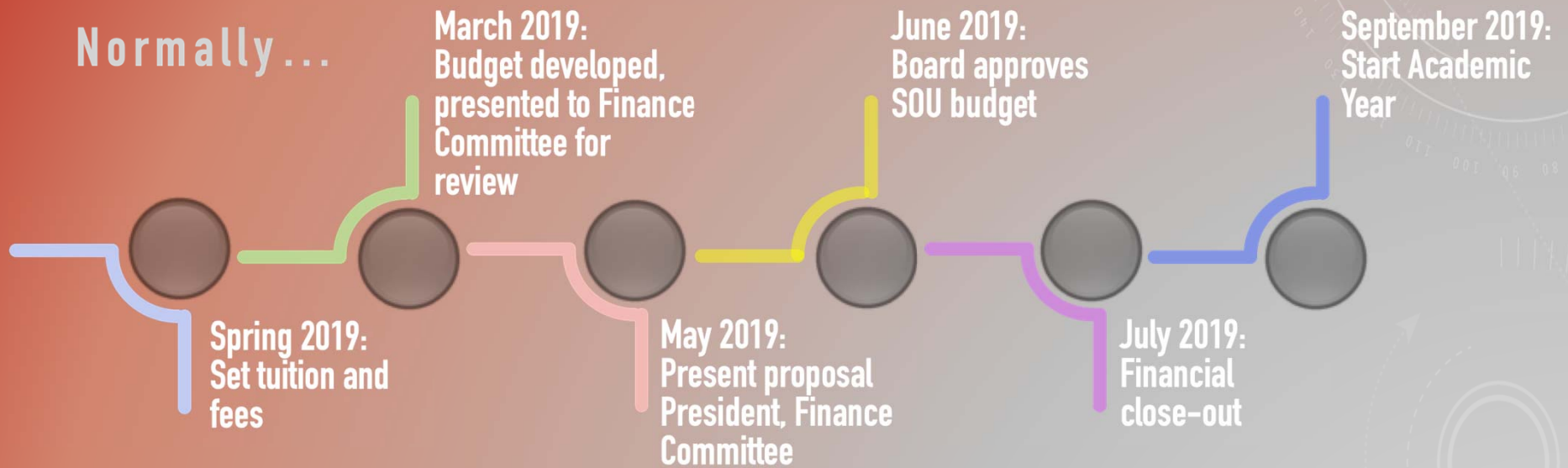
- Non-Credit & Other Public Service
- Auxiliary Mandatory Fees
- Other Auxiliary Revenues
- Student Aid Grants
- Other Grants
- Gifts
- Tuition and Fees
- State Appropriations



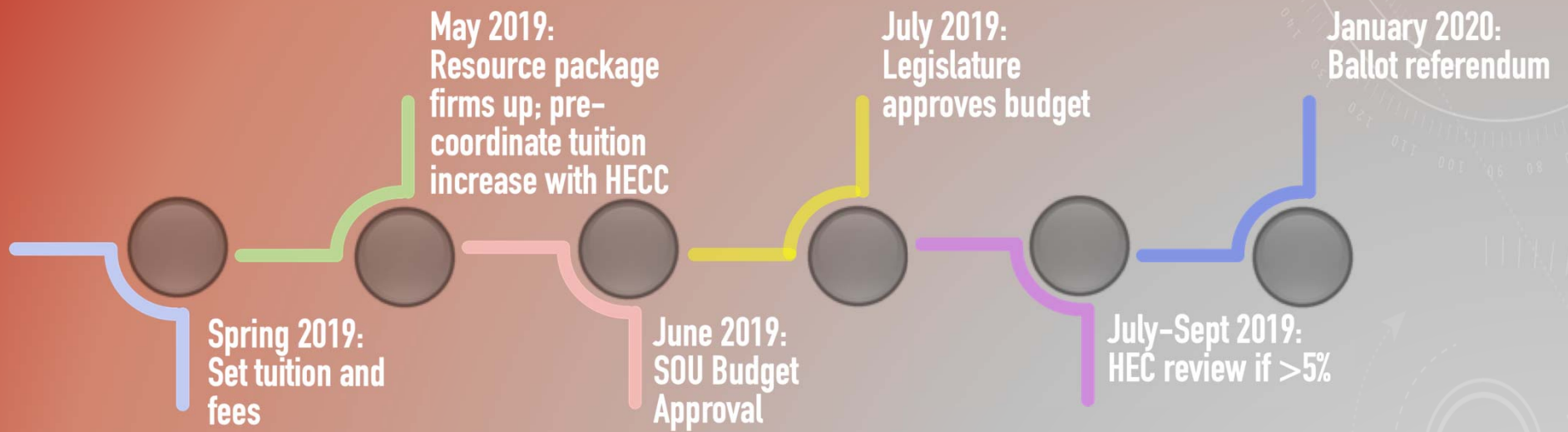


What's Next?

Normally ...



Timing is a Challenge



Education



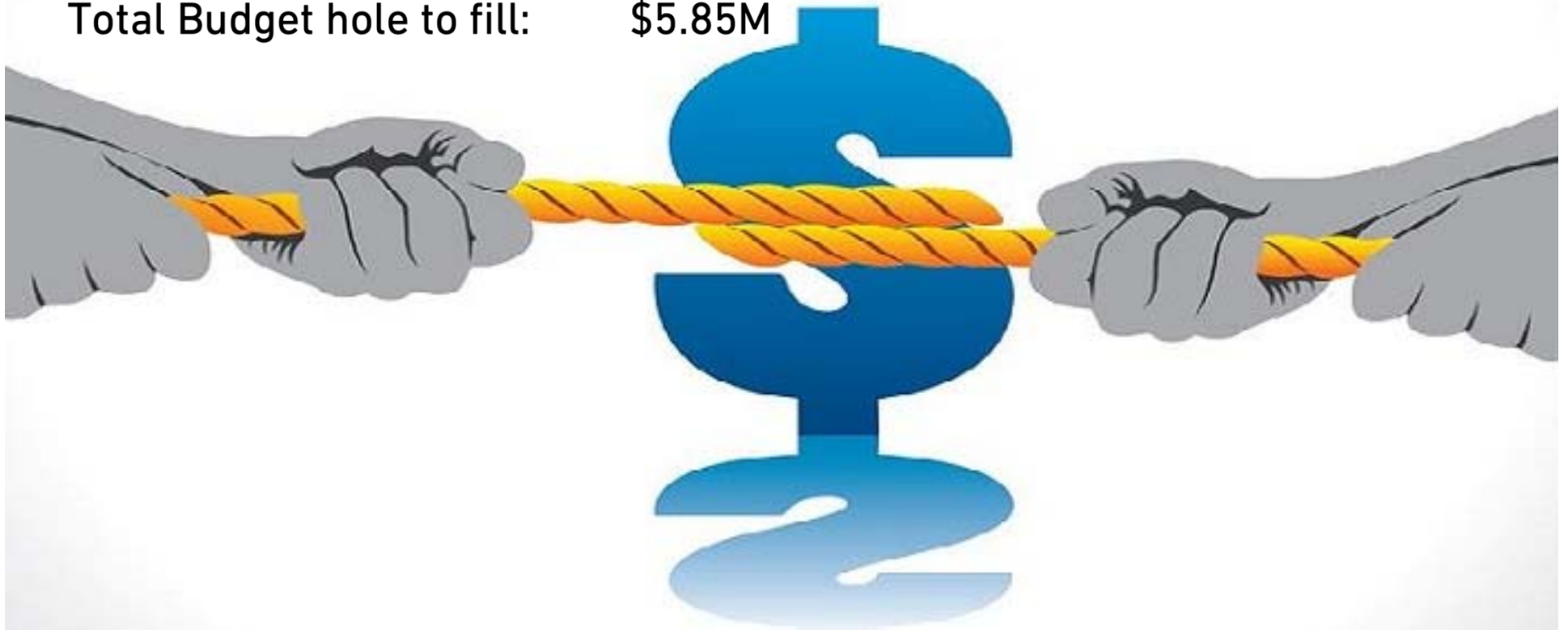
General Fund

Cost Drivers

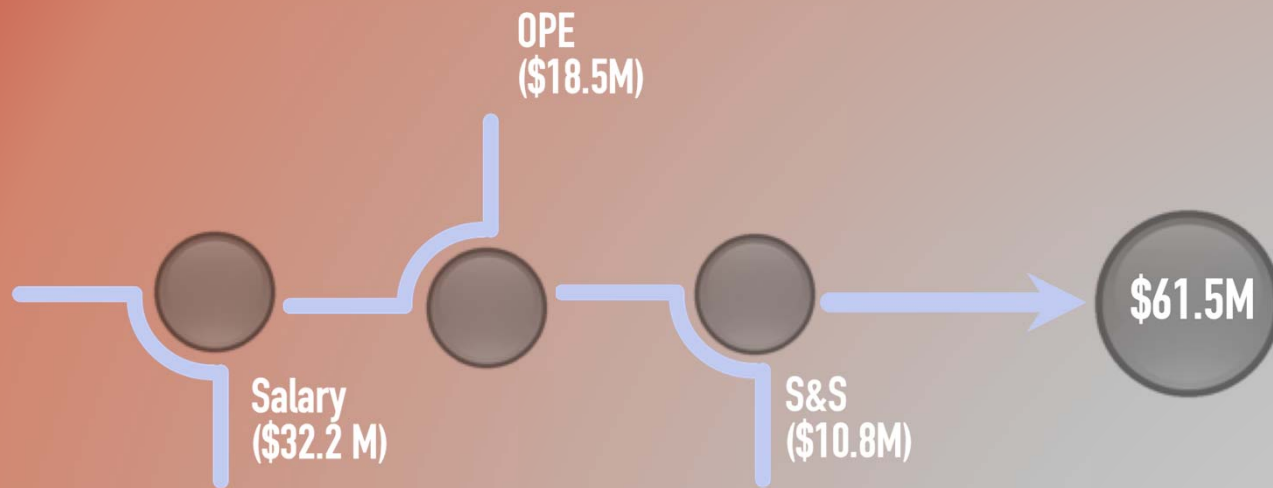
Cost Driver	Projected FY20 Cost	Notes
Faculty, Staff and Admin Salary & Wages	\$984,000	For employees paid with E&G funds only
Medical Costs	\$372,000	Assumed annual increase of 5% Positive note: Current FY19 experienced NO Growth primarily due to employees opting for less expensive plan
Retirement Costs	\$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
GRB Budget – FY20 impact: .8 M
Total Budget hole to fill: \$5.85M



Can We Control Costs?





ONE WAY - IMPROVE ENROLLMENT...

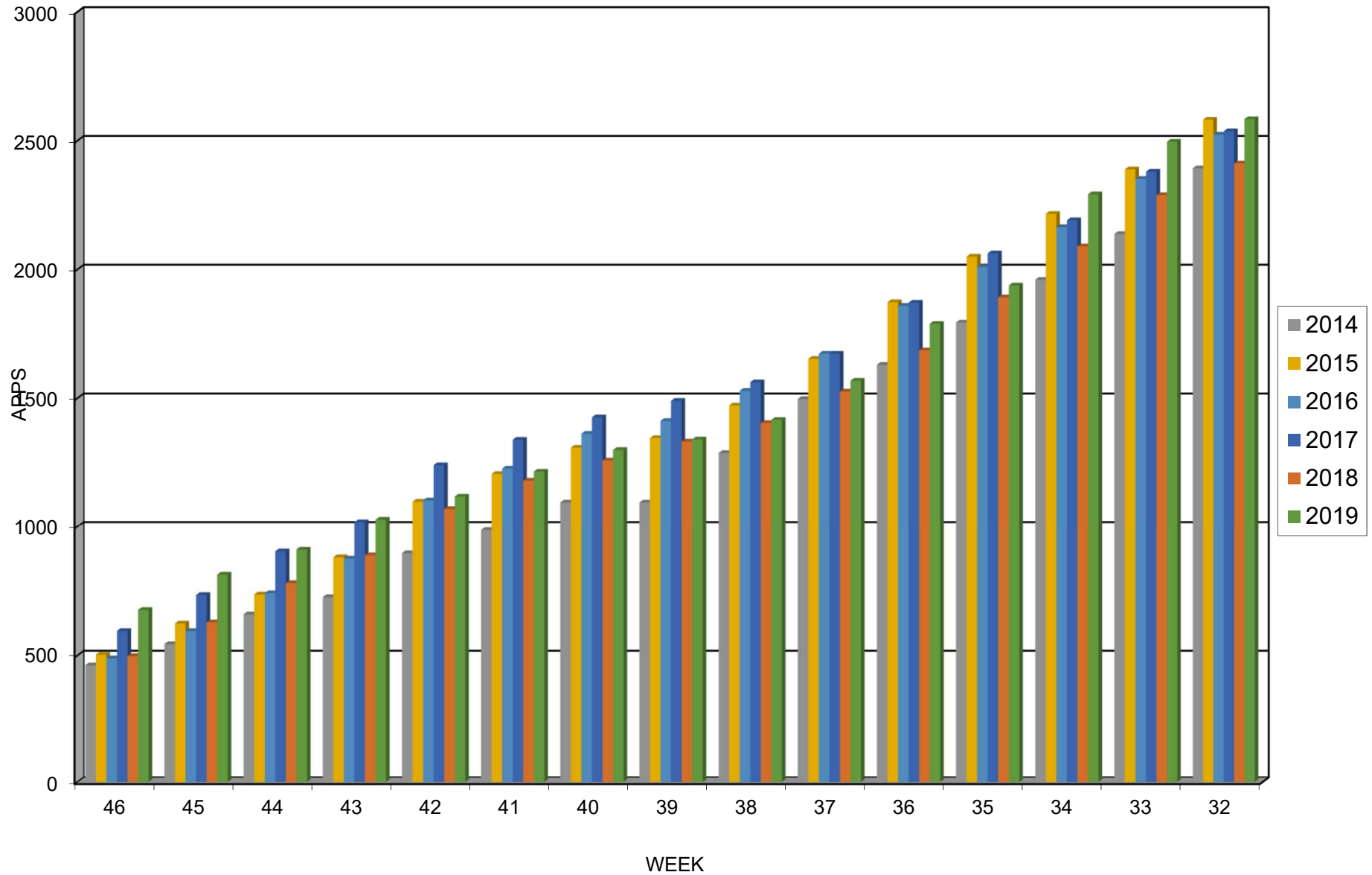
Enrollment is a function of:

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

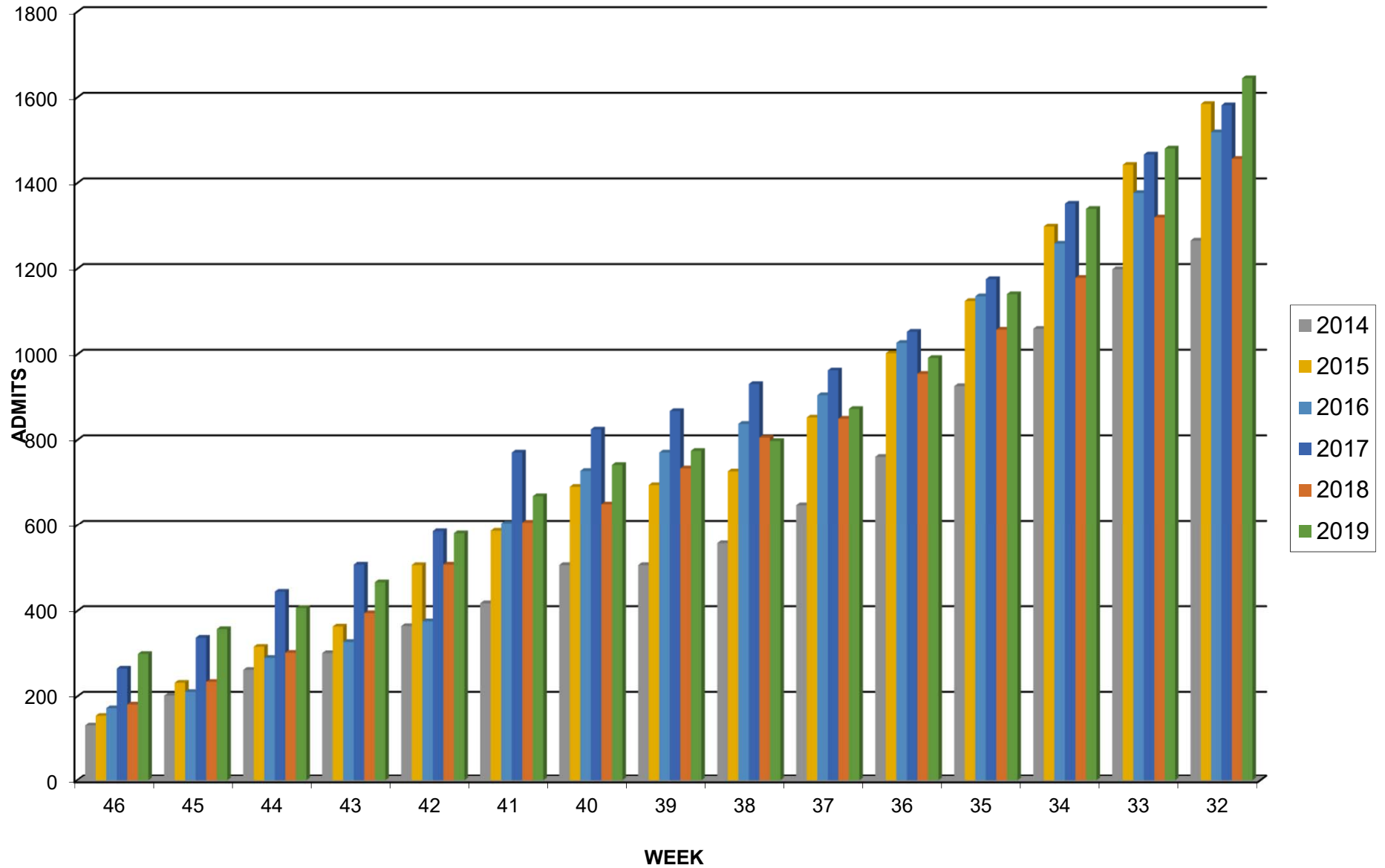
ENROLLMENT SNAPSHOT (HEADCOUNT)

	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%

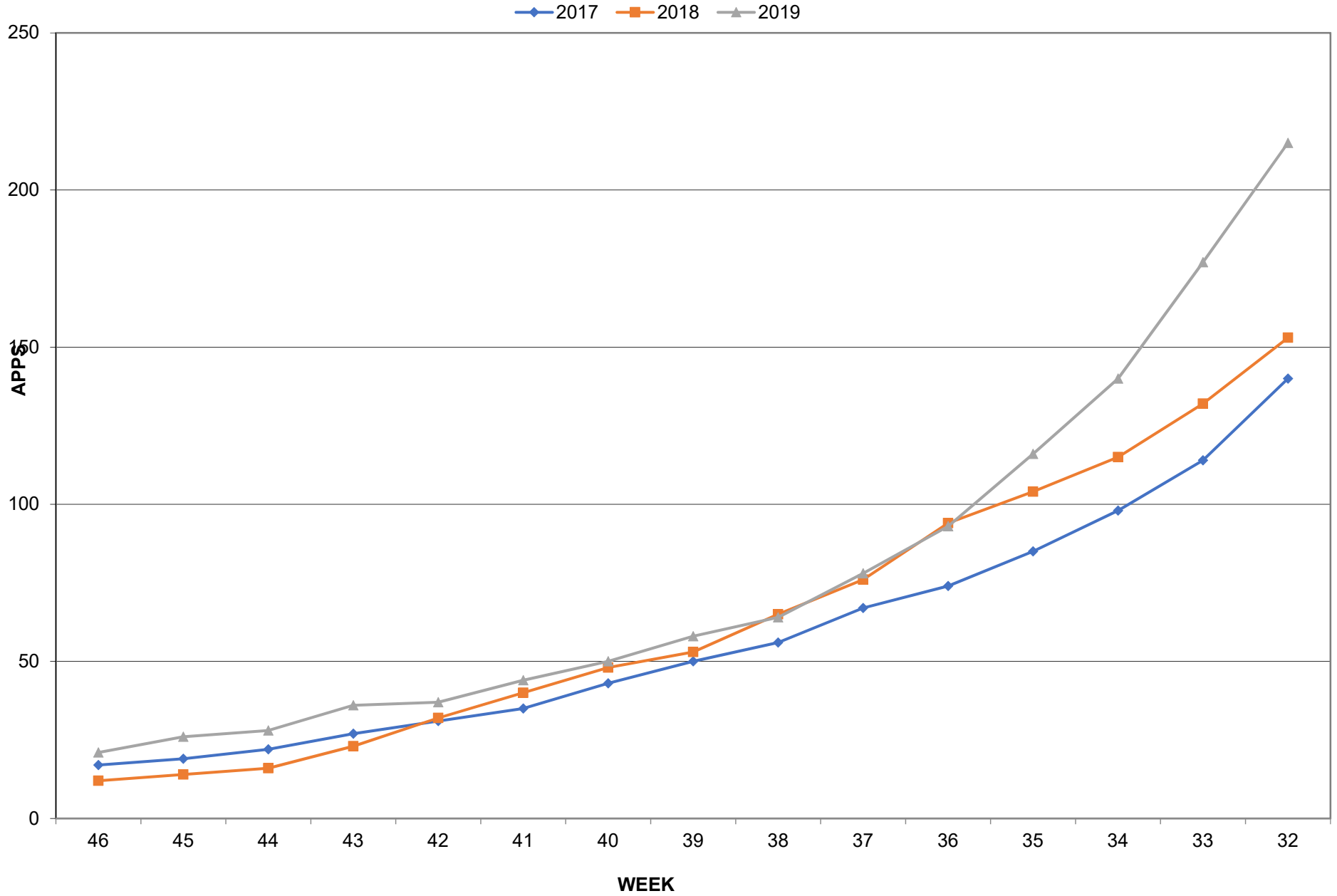
Total Fall Applications By Week By Year



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)

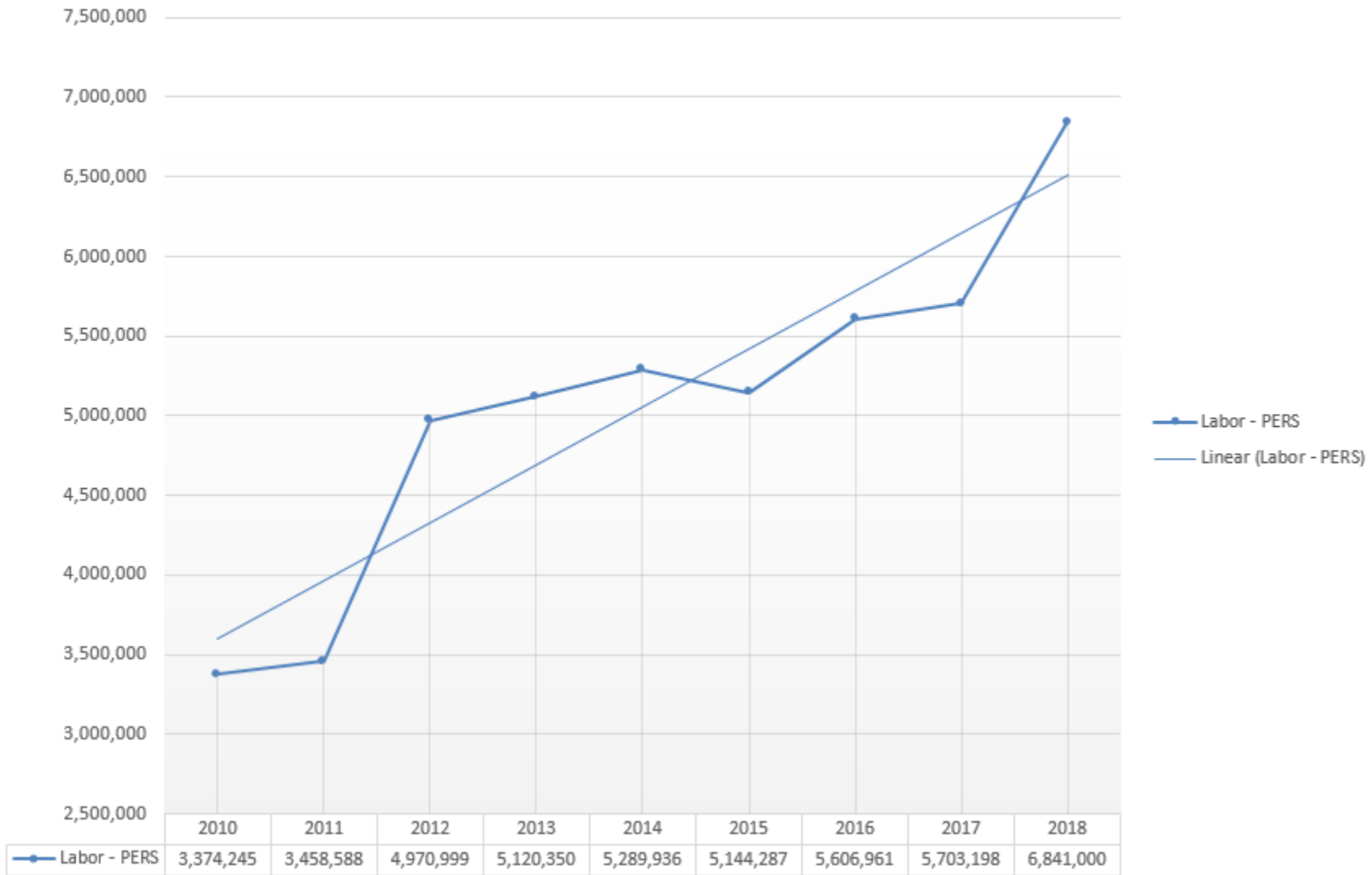
- Vice President's Report
 - Dashboard
 - General Updates
- Student Incidental and Mandatory Fees (Action)
- Tuition Advisory Council Update
- Update on 2019-21 State Funding
- Preliminary Baseline Budget Information

Information on PERS and SOU's Liability

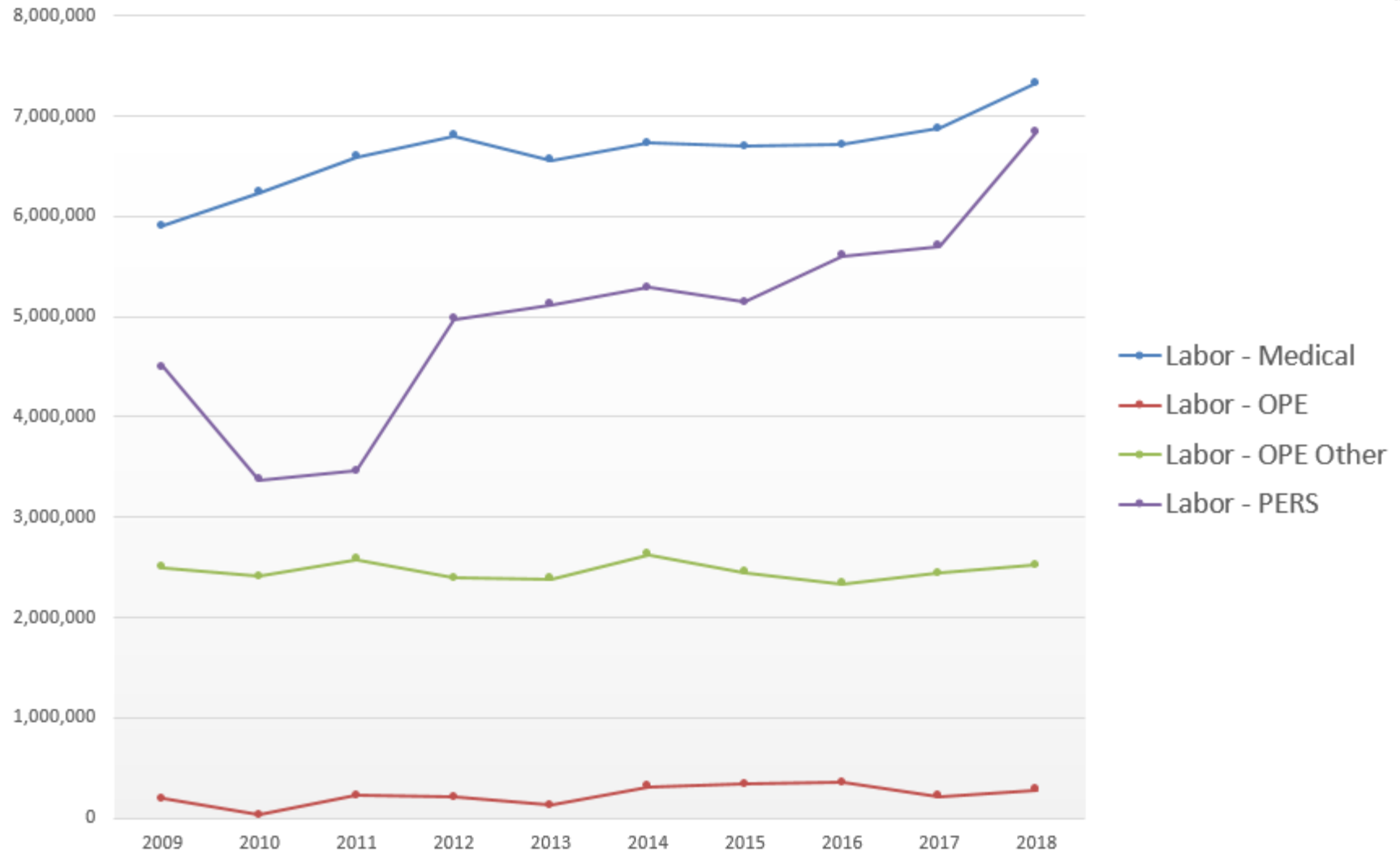


- The full Board asked for a deeper dive on PERS in January '19, and subsequent discussions ensued to ensure Board was kept abreast as this key escalating cost factor evolved
- Refer to Board minutes for other discussions
- SOU's unfunded future liability is \$30M

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>

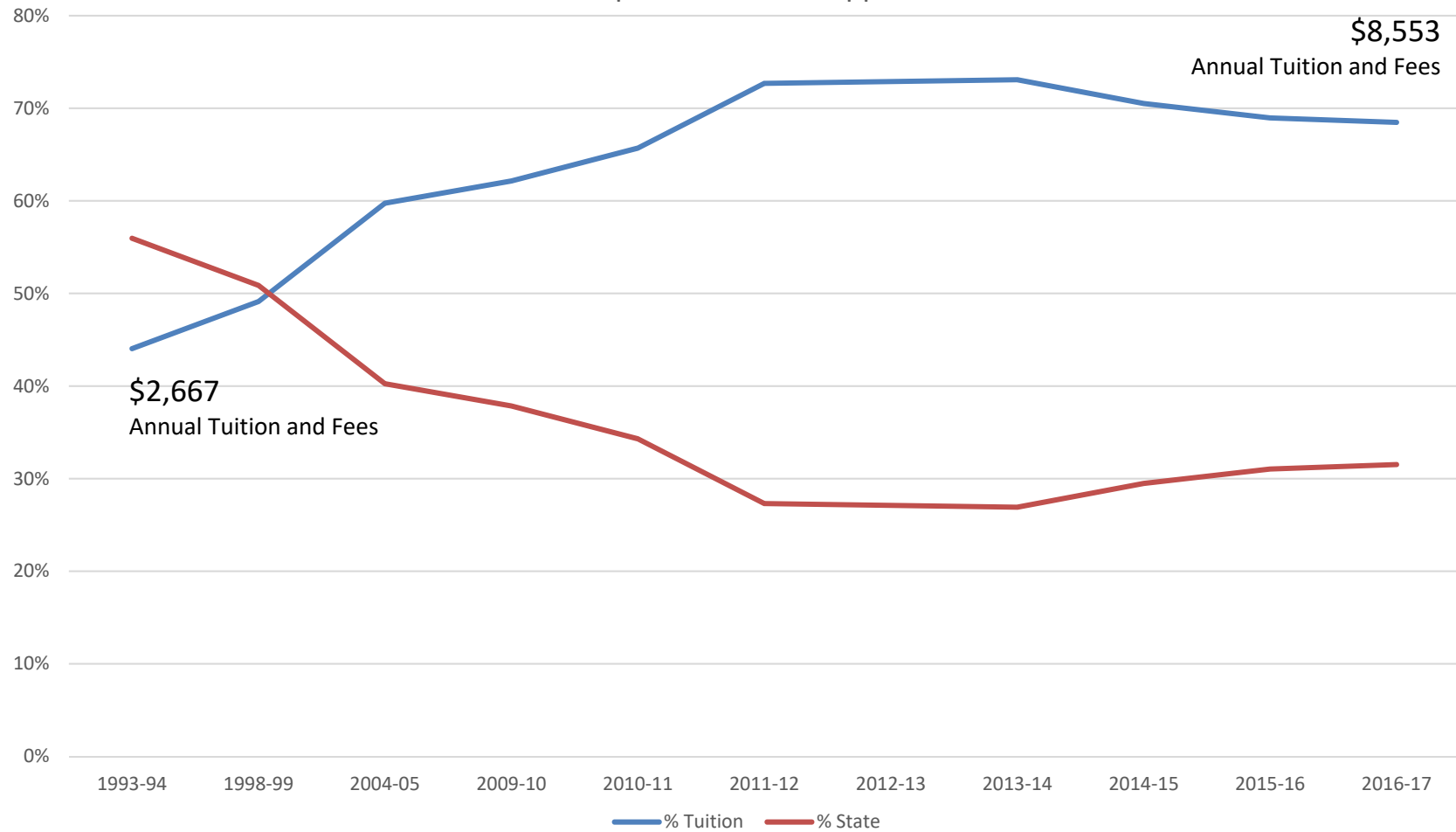
Changes in State Proportion of Higher Education and SOU Funding

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)

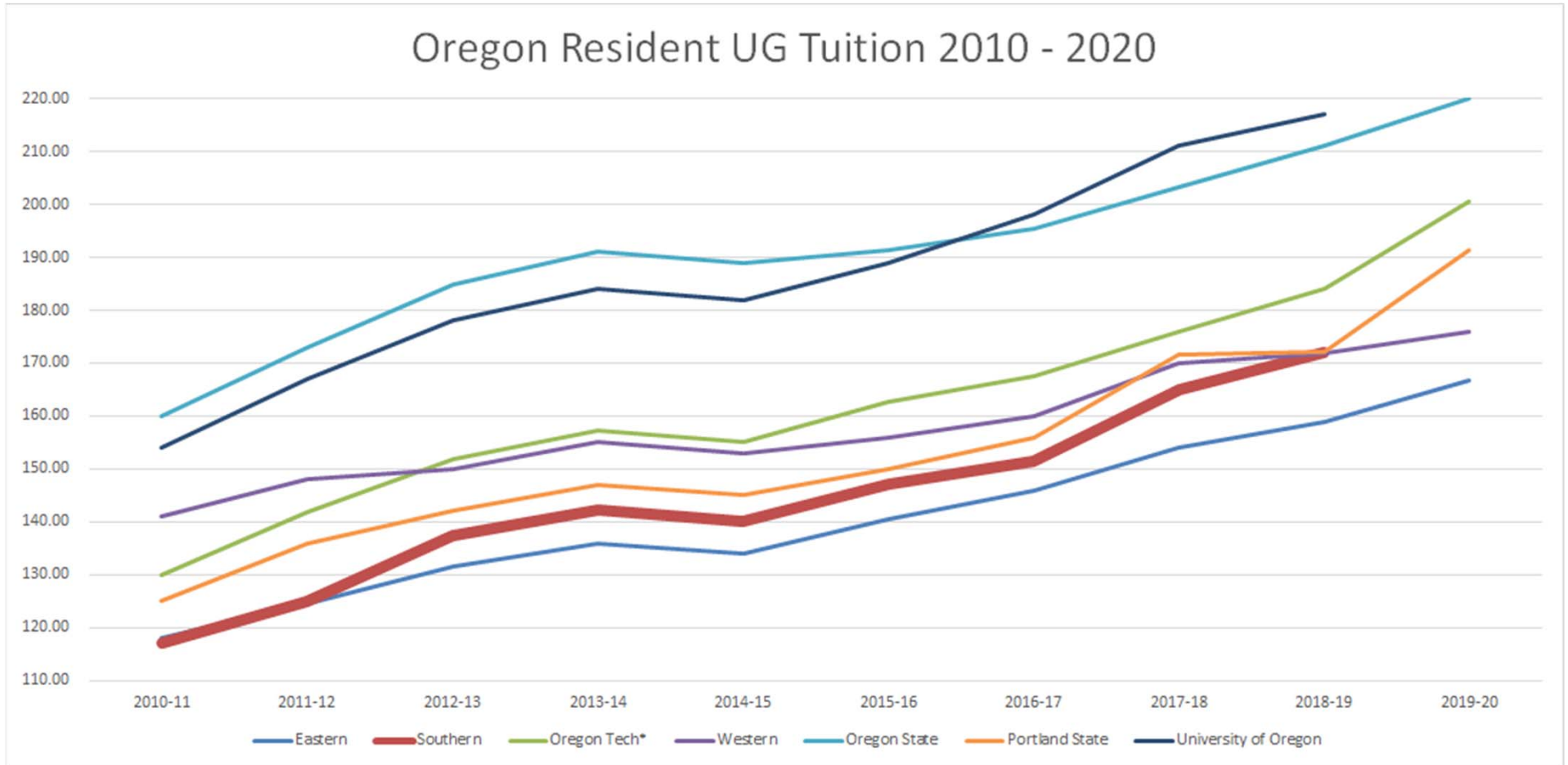


Primary Reserve Scenarios	Tuition % Increase	Tuition Cost Increase	Ending Fund Balance (\$M)			% Operating Revenue		
			18/19	19/20	20/21	18/19	19/20	20/21
Optimistic @ 8% <ul style="list-style-type: none"> \$40.5M (DAS) +2% Biennium Enrollment +3M Biennium Earmarks Flat S&S 	FY20: 9.75% FY21: 2.25%	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

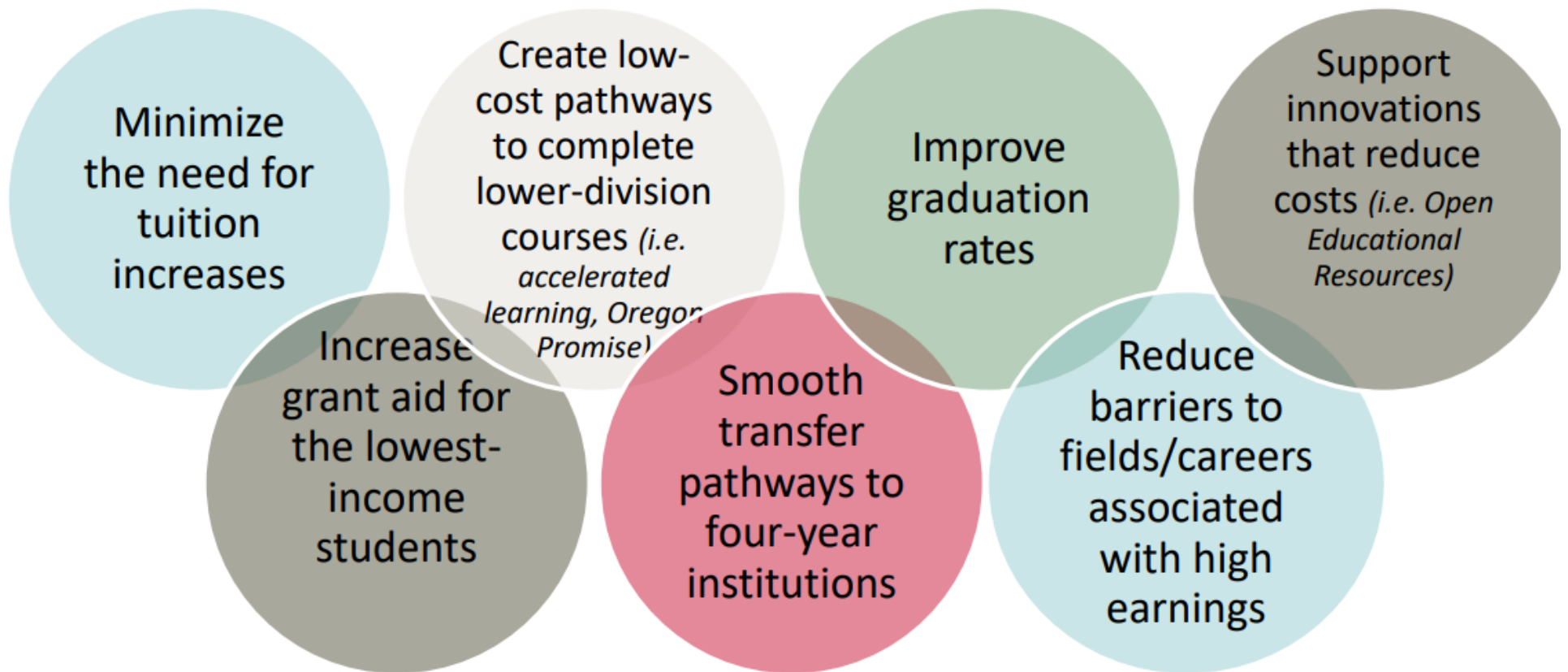
4.5 years

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

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)

Biennial Increase to PUSF*	Approximate Resident Undergraduate Tuition Increase**					
	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



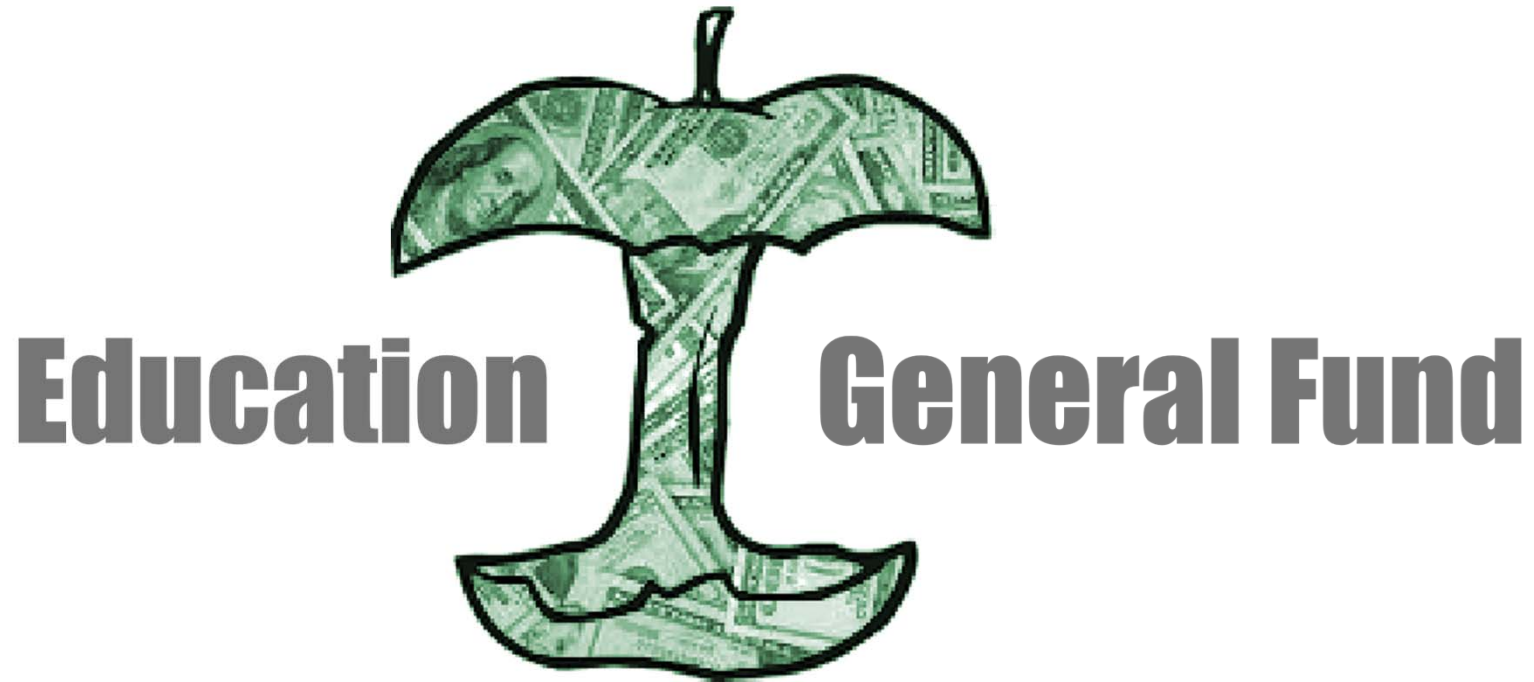
Criterion	Pessimistic	Most Likely	Optimistic
State Funding	\$40M (no Lottery)	\$40M (with ETSF and Lottery)	\$80M
Enrollment	-2%	-1%	+1%
Budget Savings / Cuts	\$2M (25% S&S, 75% Labor)	\$1M (25% S&S, 75% Labor)	\$2M (25% S&S, 75% Labor)
SOU Aid (10% of revenue)	\$4M	\$4.2M	\$4.5M
Investment (examples)	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 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%

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



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	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)

	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%

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					
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 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	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				2018-19	2019-20	2020-21	FY20			
Undergraduate Tuition Rate per SCH	4.22%	Res: 16.0%	Res: 5.0%	Difference Per SCH	Difference Per Term @ 15 SCH	Difference Per AY @ 45 SCH	Annual Tuition Cost			
		Non-Res: 5.0%	Non-Res: 5.0%							
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%	Res: 5.0%	Difference Per SCH	Difference Per Term @ 12 SCH	Difference Per AY @ 36 SCH	Annual Tuition Cost			
		Non-Res: 5.0%	Non-Res: 5.0%							
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

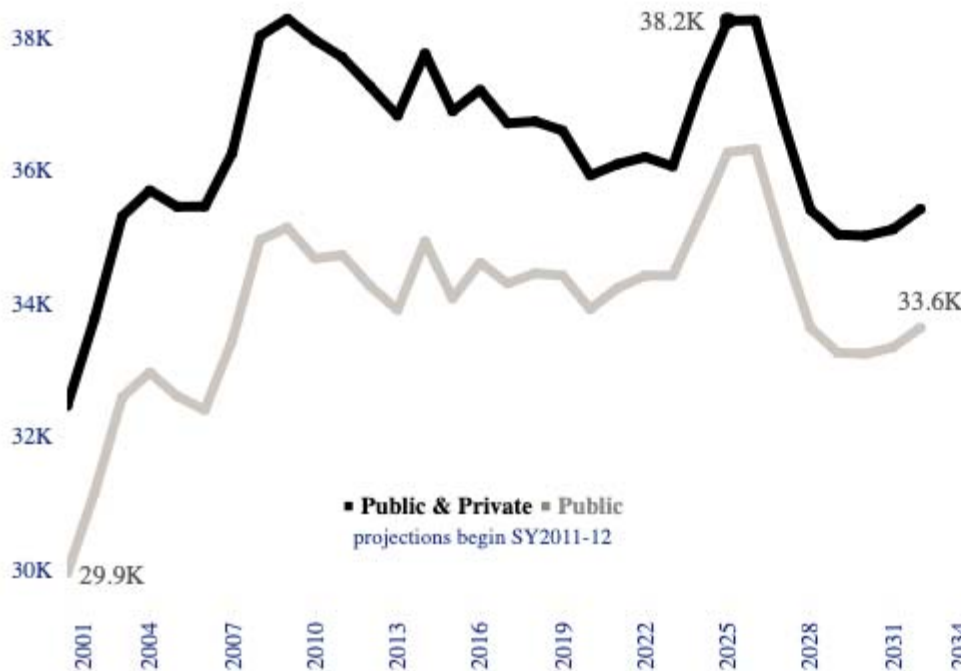
State Profile for Oregon

Oregon



KNOCKING
AT THE COLLEGE DOOR

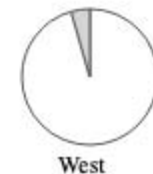
Overall High School Graduate Trends



- 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	60,000	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%
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	\$ 69,090,987	\$ 24,673,012	\$ 375,818,271
	Difference from Projection	\$ (172,984)	\$ 41,568	\$ 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%

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	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

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: [x] Approve [] Disapprove

Linda Schott
 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	2019-20	FY20			
	Current	Proposed	Difference Per Credit	Difference Per Term @ 15 Credits	Difference Per AY @ 45 Credits	Annual Tuition Cost
Undergraduate Tuition Rate per Credit		Res: 17.0% Non-Res: 5.0%				
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%				
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	Difference	Difference Per	Difference Per	Annual
Undergraduate Tuition Rate per Credit		Res: 15.0% Non-Res: 5.0%	Per Credit	Term @ 15 Credits	AY @ 45 Credits	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%	Per Credit	Term @ 12 Credits	AY @ 36 Credits	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	Difference	Difference Per	Difference Per	Annual
Undergraduate Tuition Rate per Credit		Res: 13.5% Non-Res: 5.0%	Per Credit	Term @ 15 Credits	AY @ 45 Credits	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%	Per Credit	Term @ 12 Credits	AY @ 36 Credits	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	Difference	Difference Per	Difference Per	Annual
Undergraduate Tuition Rate per Credit		Res: 12.0% Non-Res: 5.0%	Per Credit	Term @ 15 Credits	AY @ 45 Credits	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%	Per Credit	Term @ 12 Credits	AY @ 36 Credits	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	Difference	Difference Per	Difference Per	Annual
Undergraduate Tuition Rate per Credit		Res: 11.0% Non-Res: 5.0%	Per Credit	Term @ 15 Credits	AY @ 45 Credits	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%	Per Credit	Term @ 12 Credits	AY @ 36 Credits	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	Difference	Difference Per	Difference Per	Annual
Undergraduate Tuition Rate per Credit		Res: 10.0% Non-Res: 5.0%	Per Credit	Term @ 15 Credits	AY @ 45 Credits	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%	Per Credit	Term @ 12 Credits	AY @ 36 Credits	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	Difference	Difference Per	Difference Per	Annual
Undergraduate Tuition Rate per Credit		Res: 8.5% Non-Res: 5.0%	Per Credit	Term @ 15 Credits	AY @ 45 Credits	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%	Per Credit	Term @ 12 Credits	AY @ 36 Credits	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

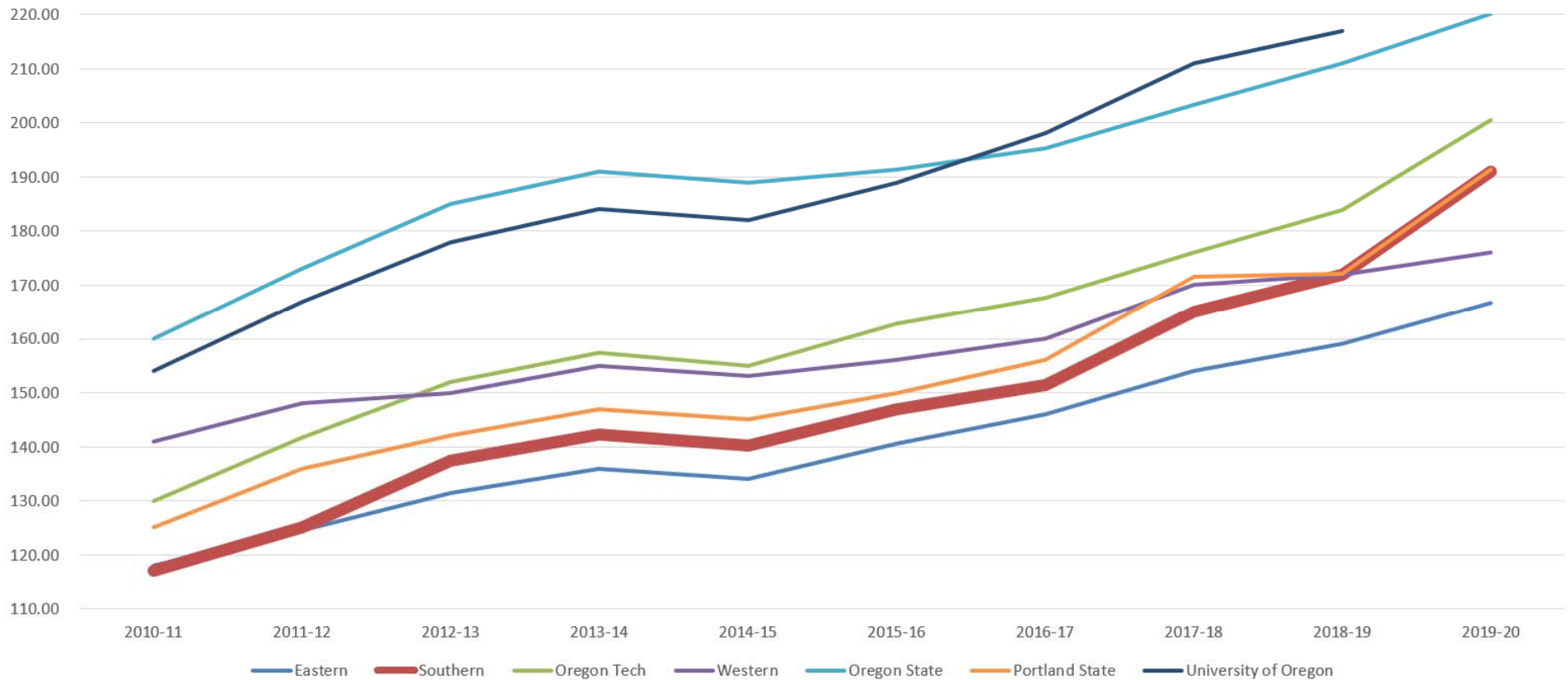
Institution	2016-17	2017-18	2018-19	2019-20	AY % Increase
Eastern	146.00	153.95	159.00	166.79	4.90%
Southern	151.46	165.04	172.00		
Oregon Tech	167.63	176.01	183.93	200.48	9.00%
Western	160.00	170.00	172.00	176.01	2.33%
Oregon State	195.33	203.33	211.00	220.05	4.29%
Portland State	156.00	171.60	172.23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

**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 Finance and Administration Committee of the Board of Trustees of Southern Oregon University hereby recommends the full Board of Trustees approve 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.

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	2019-20	FY20			
	Current	Proposed	Difference	Difference Per	Difference Per	Annual
Undergraduate Tuition Rate per Credit	Res: 13.5% Non-Res: 5.0%		Per Credit	Term @ 15 Credits	AY @ 45 Credits	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%		Per Credit	Term @ 12 Credits	AY @ 36 Credits	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	Difference	Difference Per	Difference Per	Annual
Undergraduate Tuition Rate per Credit	Res: 12.0% Non-Res: 5.0%		Per Credit	Term @ 15 Credits	AY @ 45 Credits	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%		Per Credit	Term @ 12 Credits	AY @ 36 Credits	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	Difference	Difference Per	Difference Per	Annual
Undergraduate Tuition Rate per Credit	Res: 11.0% Non-Res: 5.0%		Per Credit	Term @ 15 Credits	AY @ 45 Credits	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	Difference Per	Difference Per	Annual
			Per Credit	Term @ 12 Credits	AY @ 36 Credits	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	Difference	Difference Per	Difference Per	Annual
Undergraduate Tuition Rate per Credit	Res: 10.0% Non-Res: 5.0%		Per Credit	Term @ 15 Credits	AY @ 45 Credits	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	Difference Per	Difference Per	Annual
			Per Credit	Term @ 12 Credits	AY @ 36 Credits	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	Difference	Difference Per	Difference Per	Annual
Undergraduate Tuition Rate per Credit		Res: 8.5% Non-Res: 5.0%	Per Credit	Term @ 15 Credits	AY @ 45 Credits	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%	Per Credit	Term @ 12 Credits	AY @ 36 Credits	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

(Dynamic Pro Forma Review 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

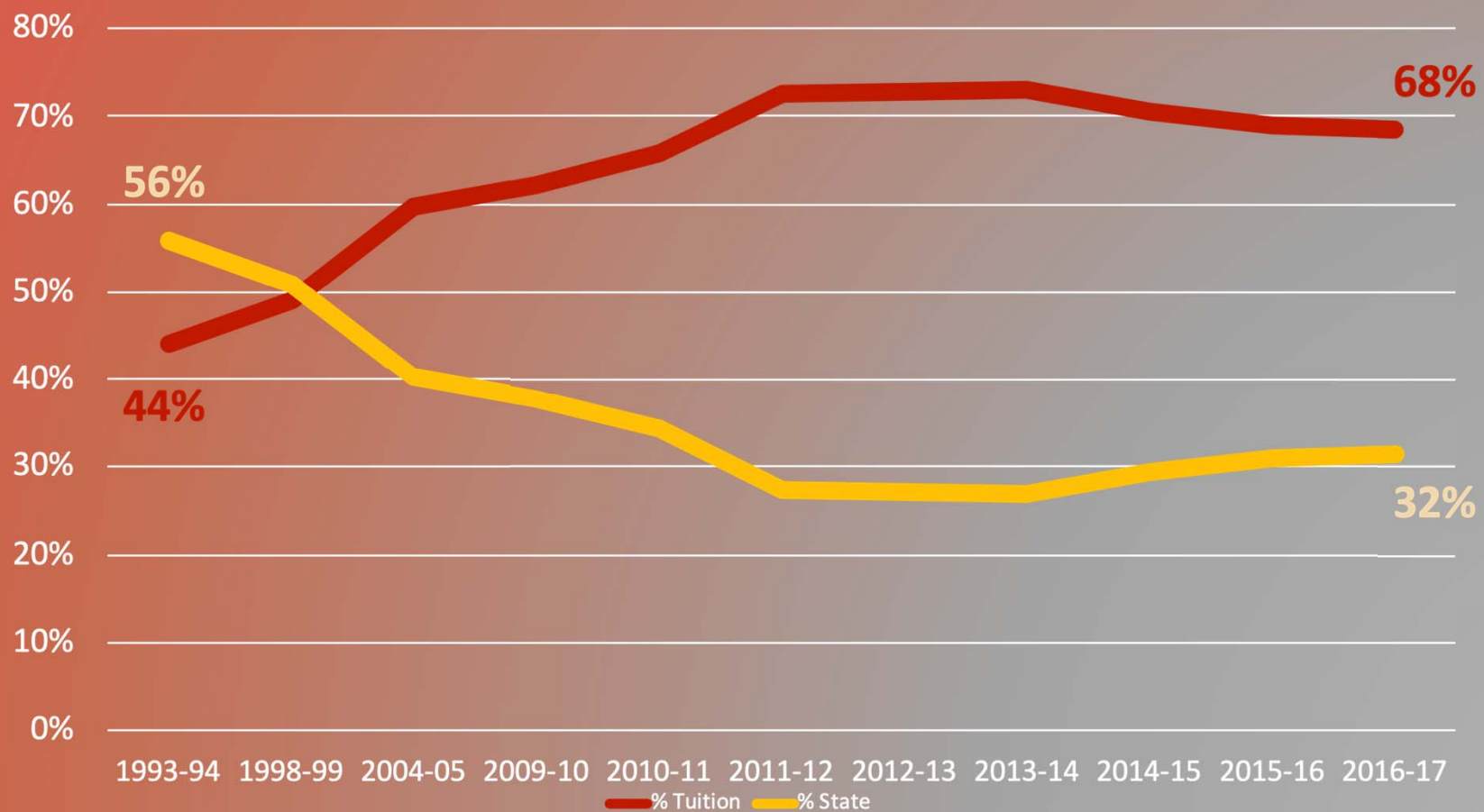
Table 1: Recommended Resident Undergraduate Tuition Rate per PUSF Allocation Scenario

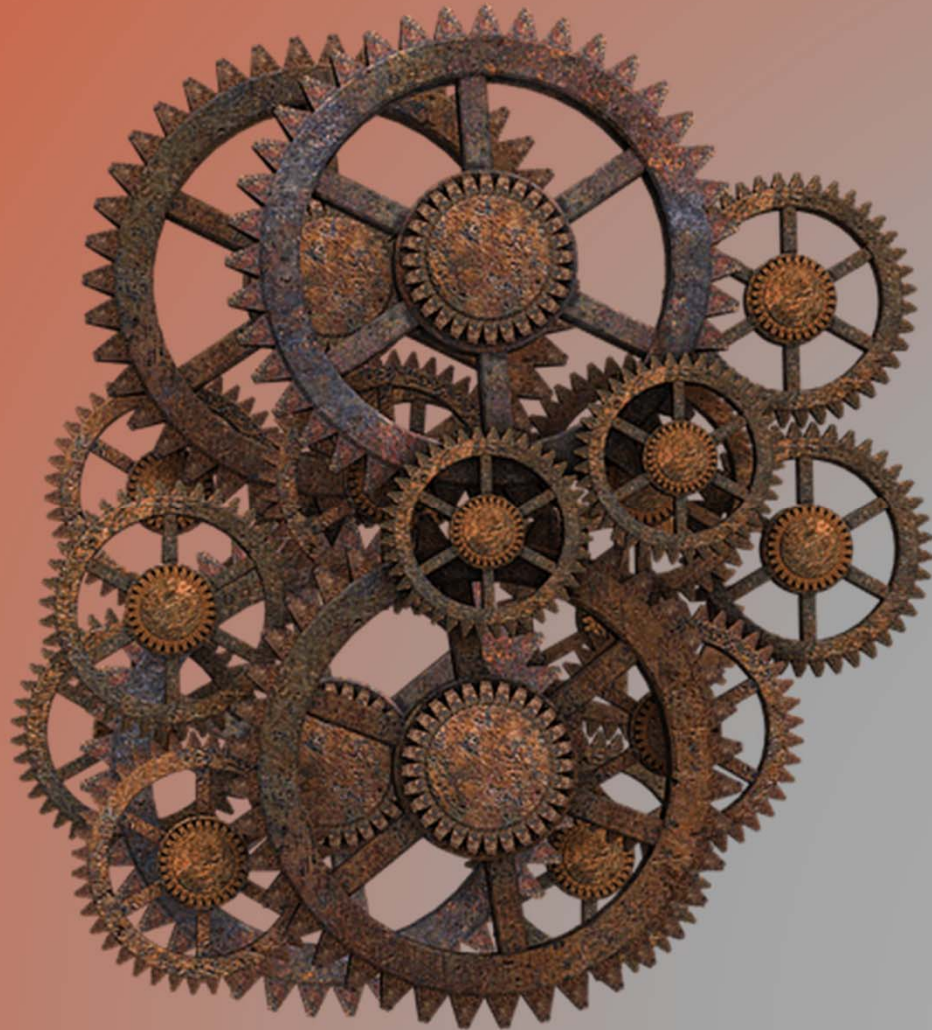
PUSF	PUSF increase from current biennium	Proposed Undergraduate Tuition Rate per credit	Difference Per Credit	Difference Per Term @ 15 Credits	Difference Per Academic Year @ 45 Credits	% Rate Increase
GRB \$737M	\$0	\$201	\$29	\$435	\$1,305	17.0%
\$757M	+20M	\$198	\$26	\$390	\$1,170	15.0%
\$777.5M	+40.5M	\$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.

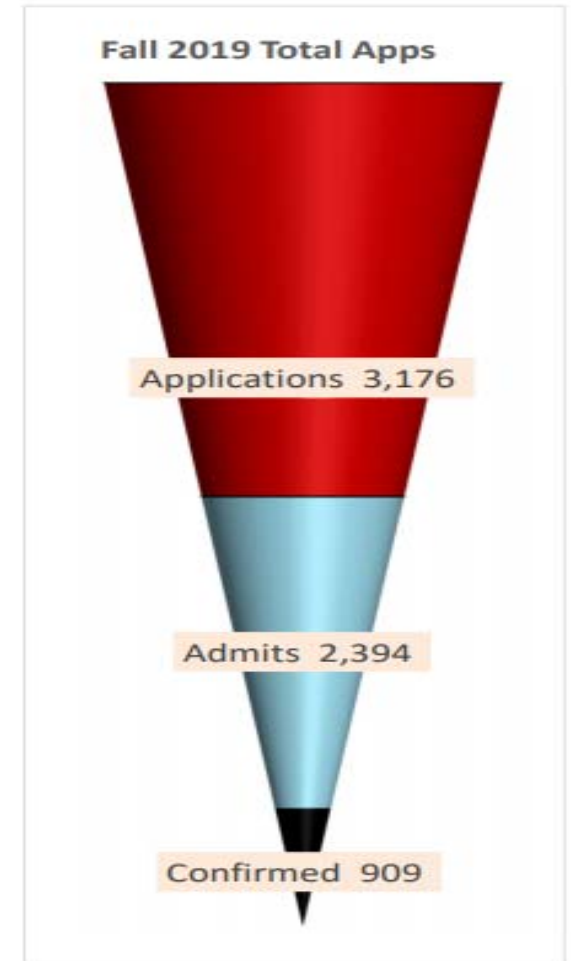
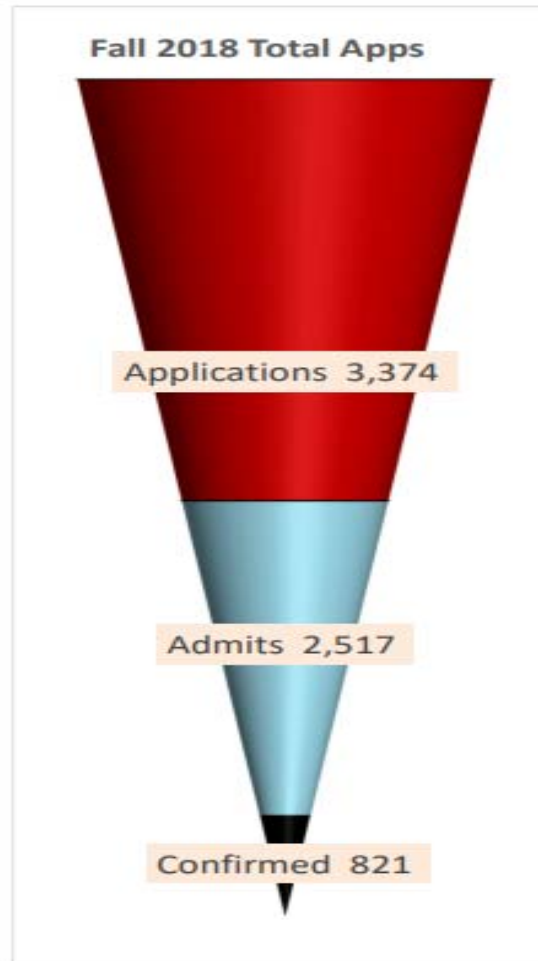
SSCM Allocations at Co-Chair's Budget

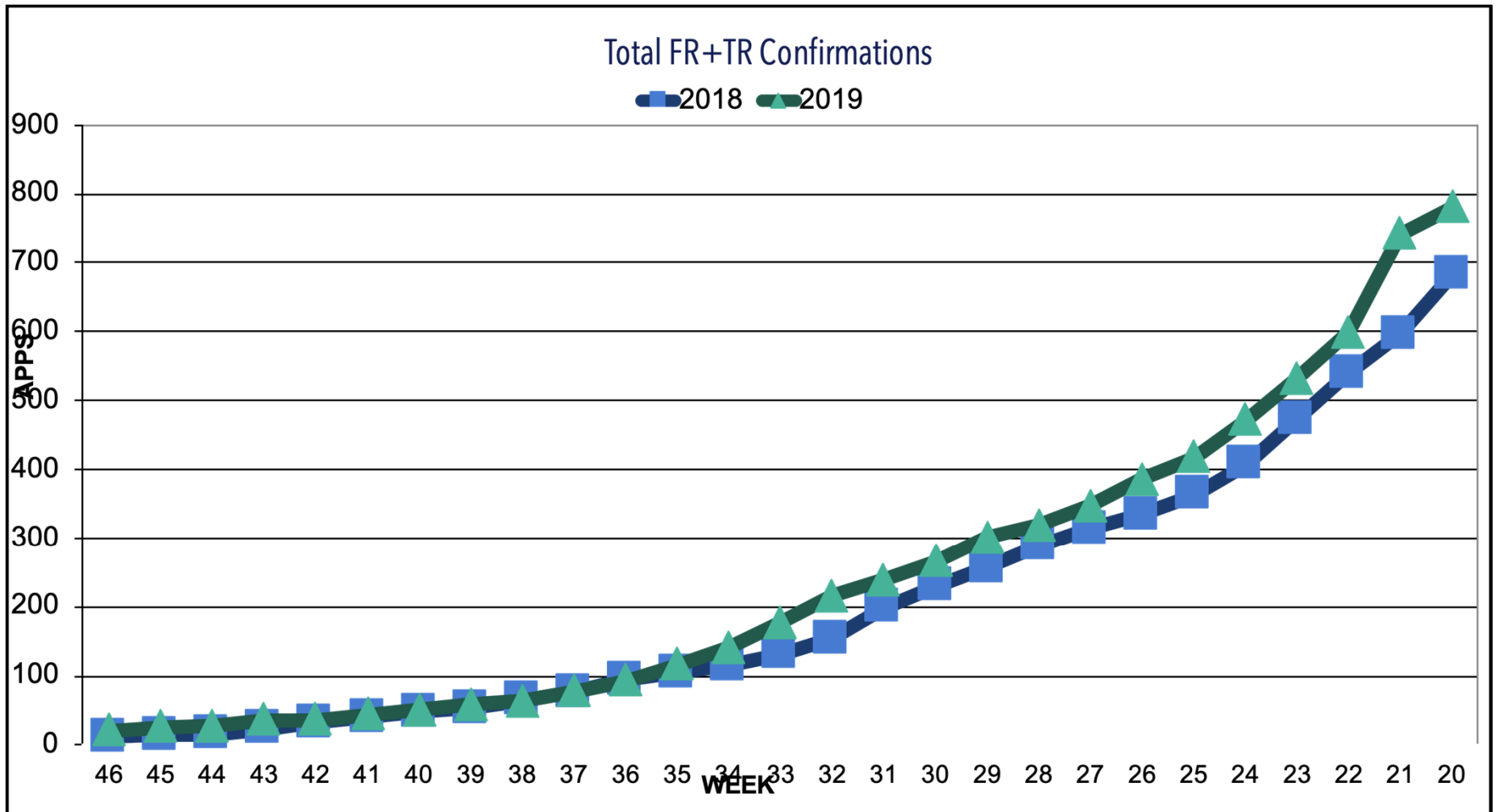
Institution	FY18	FY19	2017-19	FY20	FY21	2019-21	Year-to-Year Difference FY20	Year-to-Year Difference FY21	2019-21 Percent Change
EOU	\$19,898,918	\$20,186,726	\$40,085,644	\$19,980,353	\$20,469,682	\$40,450,035	\$(206,373)	\$489,329	0.91%
OIT	\$26,034,493	\$27,455,306	\$53,489,799	\$27,770,186	\$28,791,807	\$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





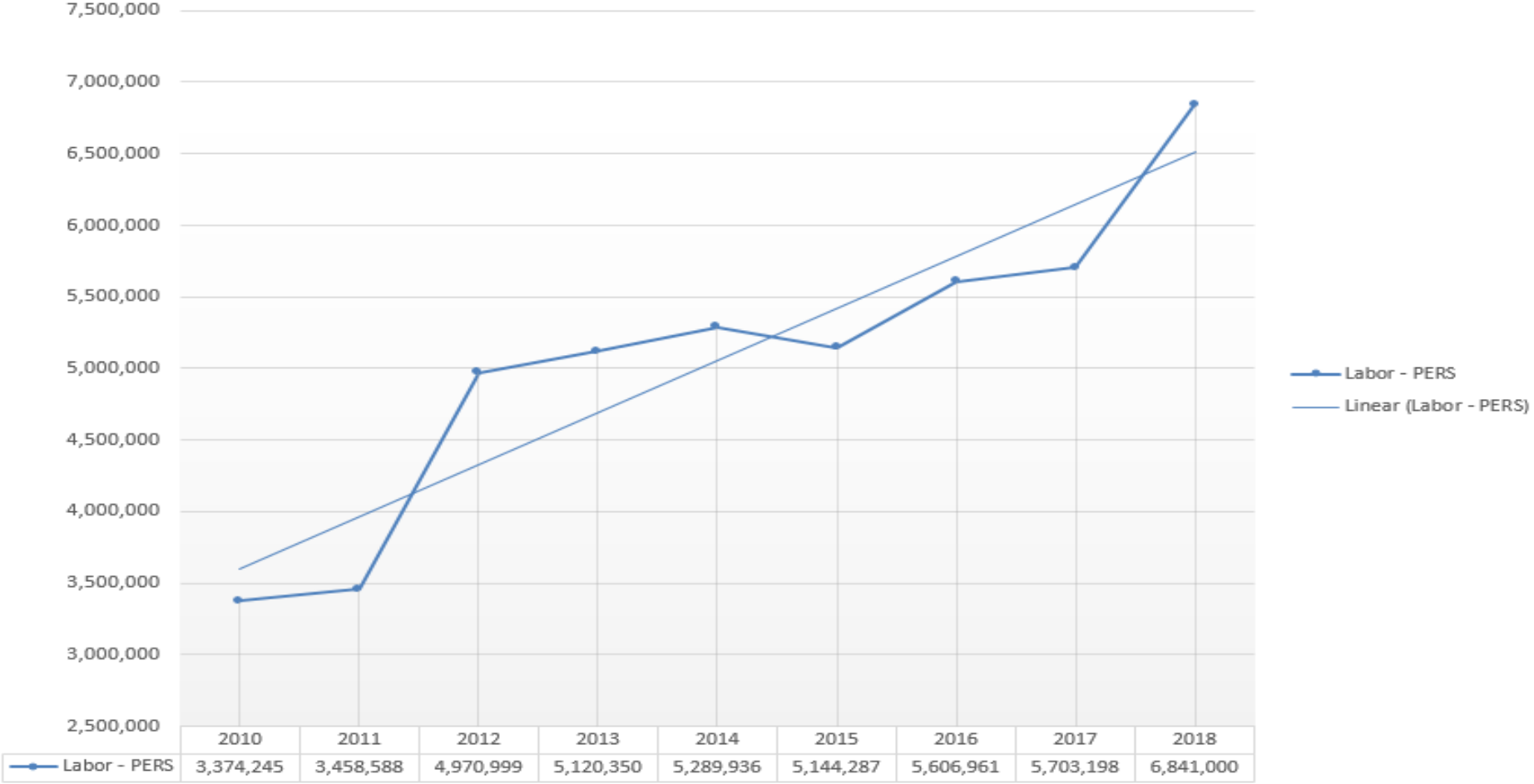
Education



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

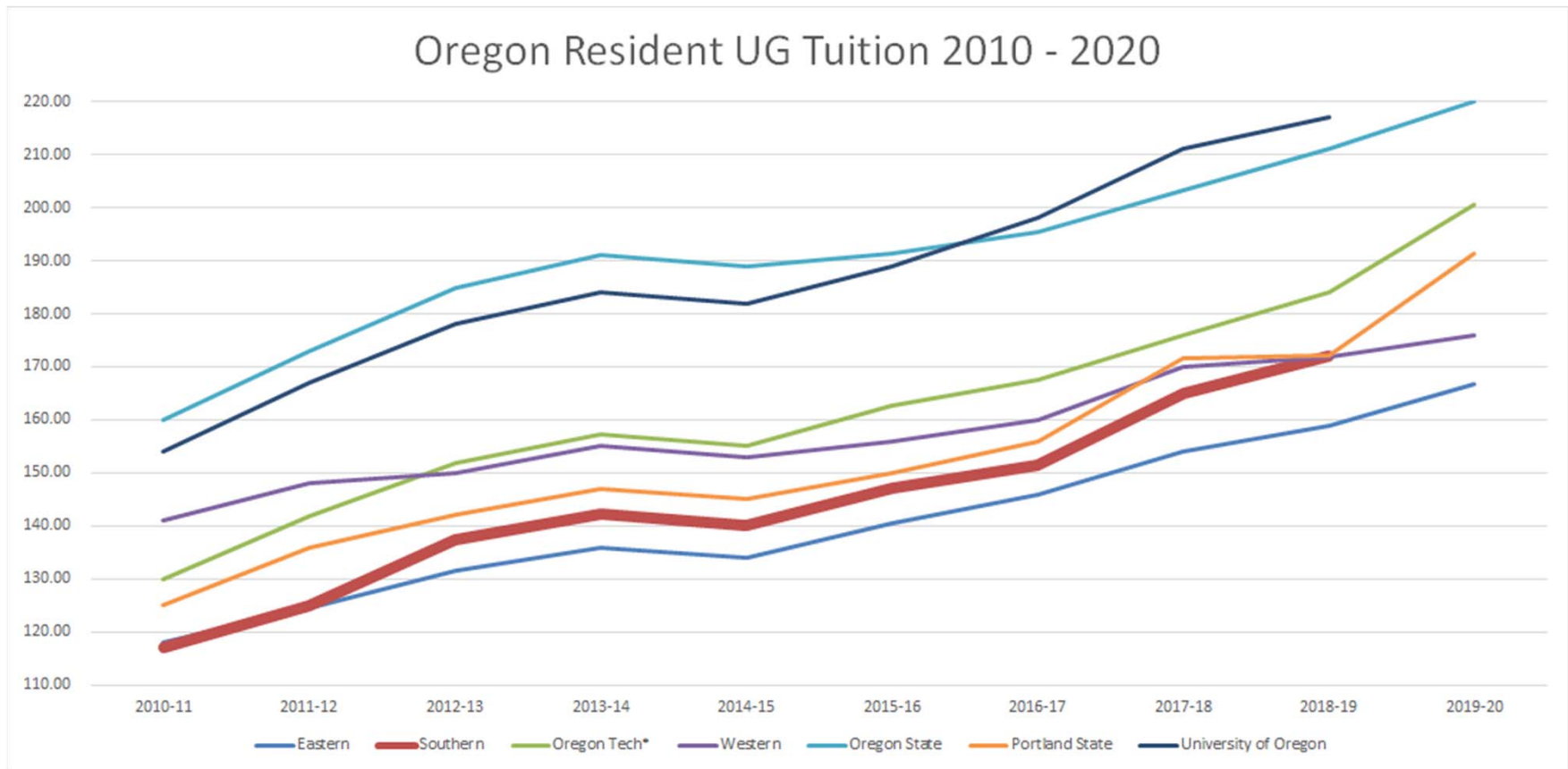
(From Oct 2018 FAC Meeting)

- 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

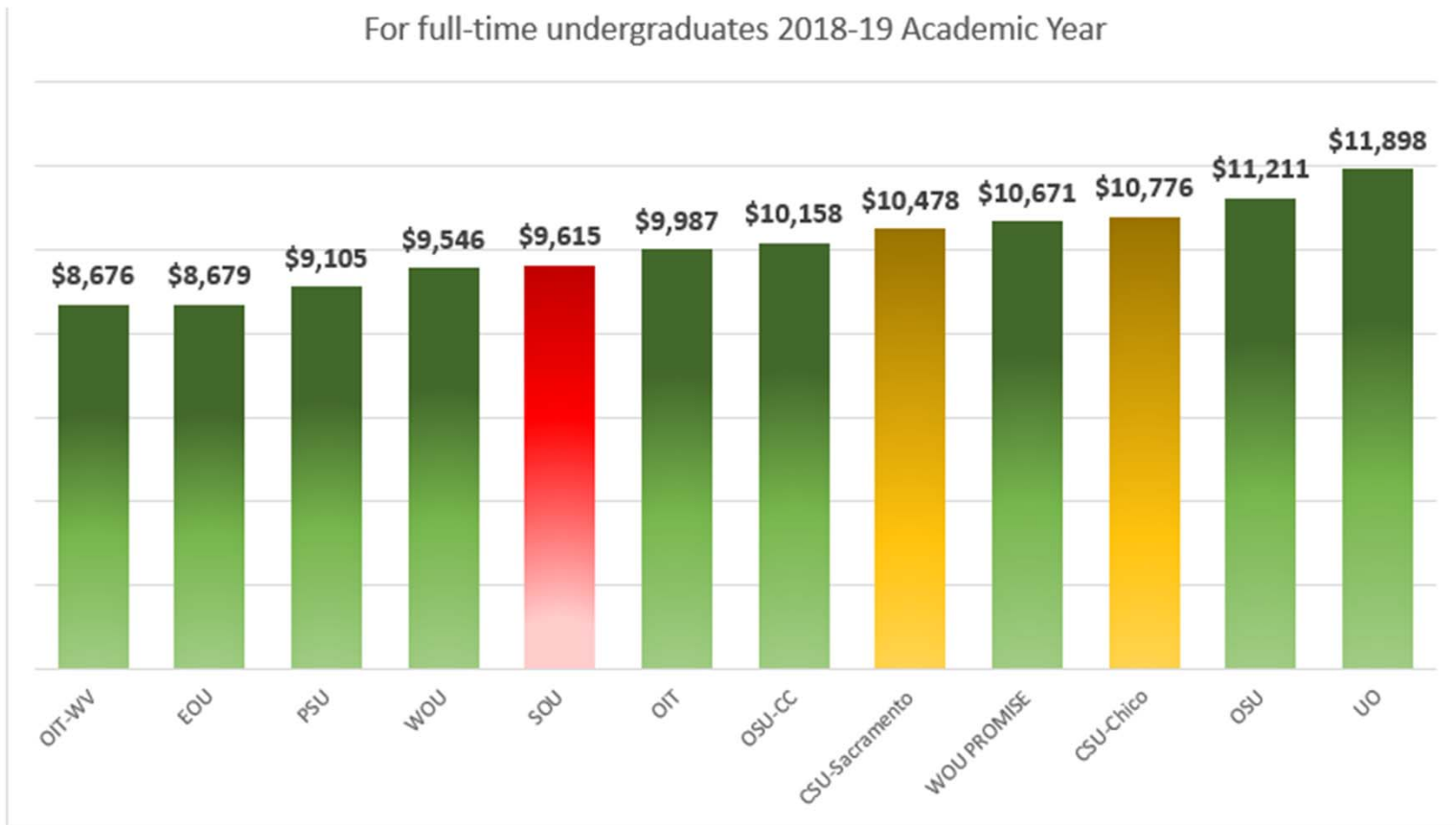
	2017-19 Biennium			2019-21 Biennium		2021-23 Biennium	
	2017-18 Actual (000's)	2018-19 Prop Budget (000's)	2018-19 FORECAST (000's)	2019-20 FORECAST (000's)	2020-21 FORECAST (000's)	2021-22 FORECAST (000's)	2022-23 FORECAST (000's)
Education and General (in thousands of dollars)							
Revenue							
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	21,683	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	2,243	2,247	2,219	2,219	2,442
Total Revenues	60,844	65,491	61,469	66,594	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 (S Other)	(1,430)	(1,576)	(1,578)	(1,650)	(1,760)	(1,871)	(1,982)
Labor	(31,763)	(33,265)	(32,364)	(34,406)	(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)	(60,669)
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)	(62,620)	(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)	(2,969)
Change in Fund Balance	381	281	(1,796)	(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	1,022
% 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

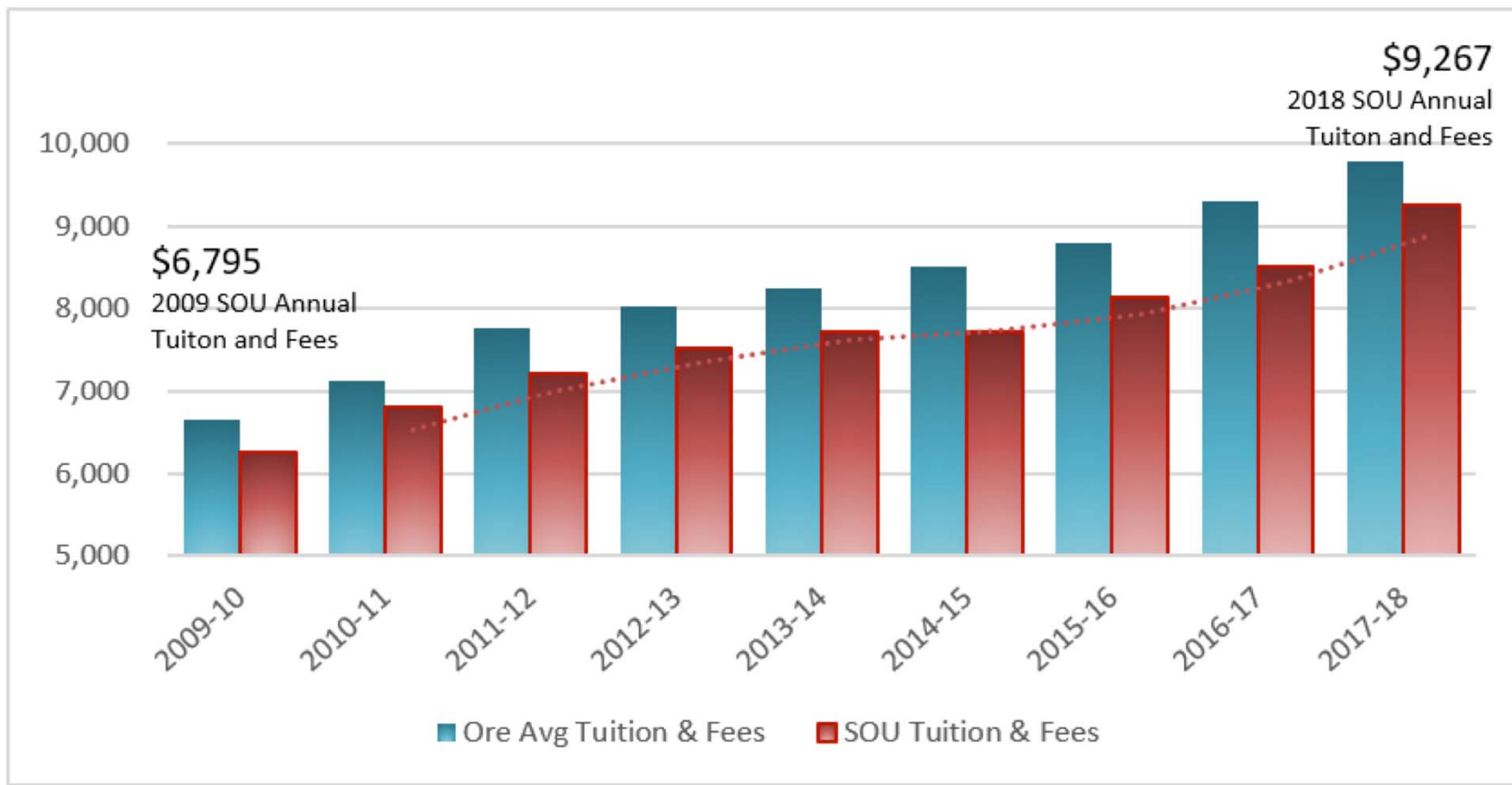
3.6 Million



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

➦ Share



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



 **Southern Oregon University** ...
Published by Shanztyn Nihipali [?]
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>

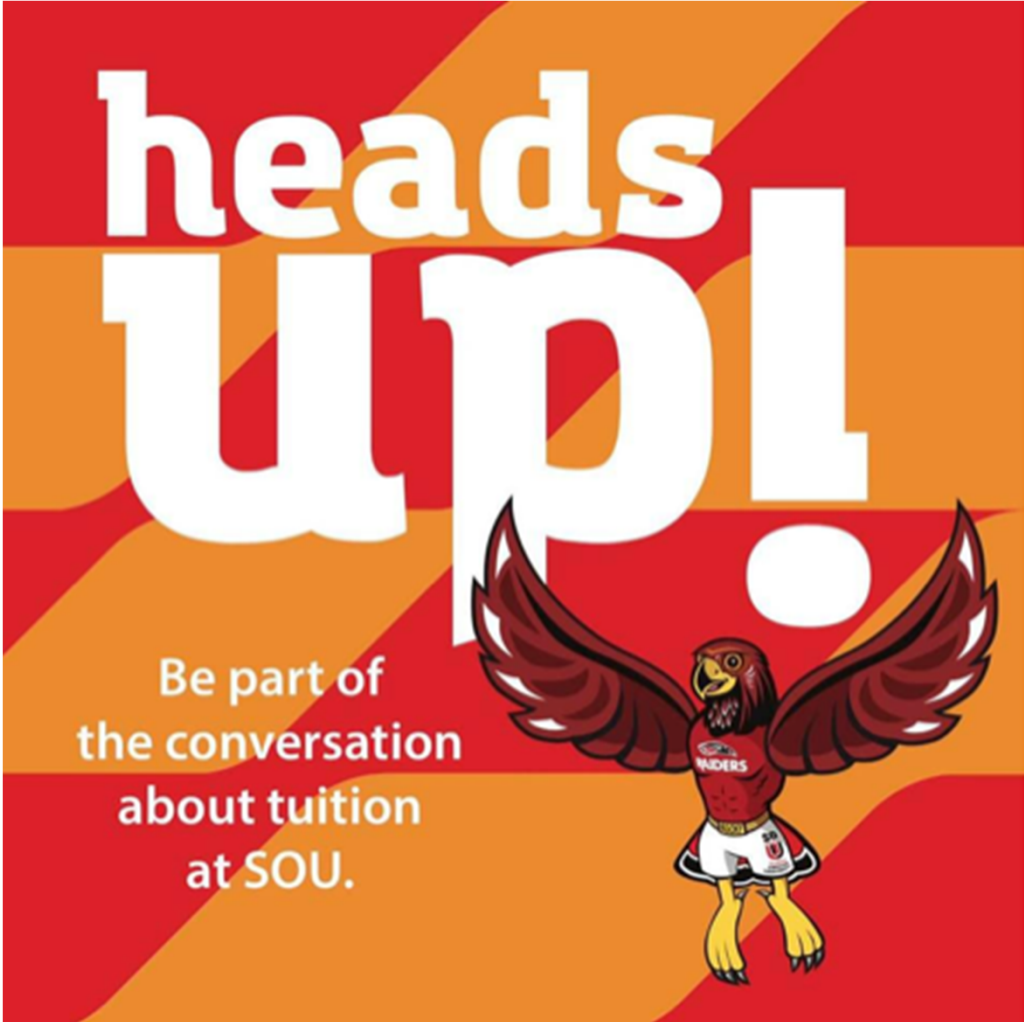
[Student Life at Southern Oregon University](#)

 Tag Photo  Add Location  Edit

 Nicolle Aleman

 Like  Comment  Share 

 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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[Academics](#) [Specialized Programs](#) [Request Info](#)



Graduate in Three Years Instead of Four!

Jackson/Josephine Pledge Program

[Discover](#) [Visit](#) [Apply](#) [Afford](#) [Enroll](#)

[Academics](#) [Specialized Programs](#) [Request Info](#)



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!

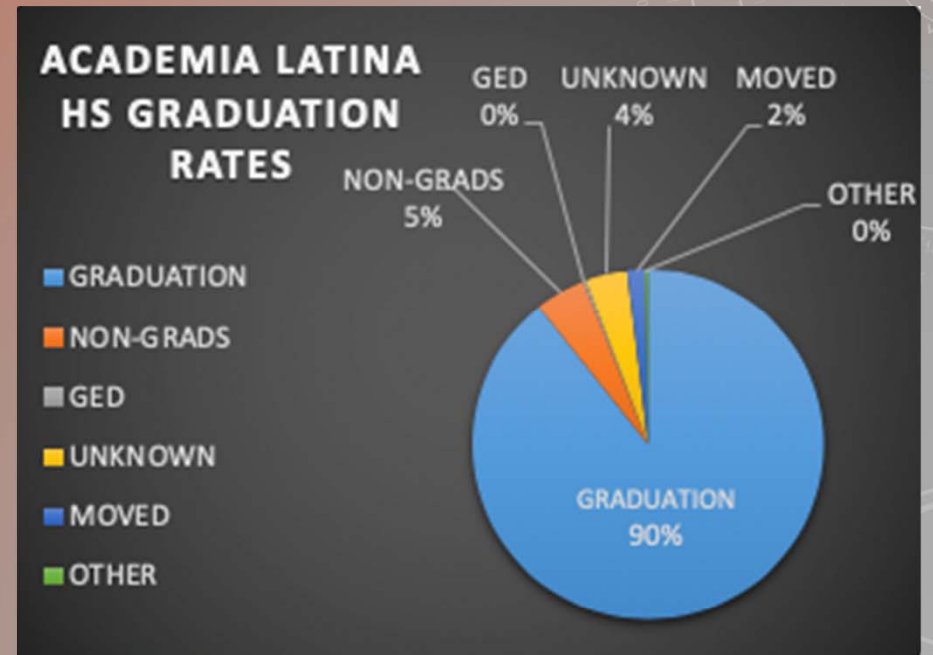
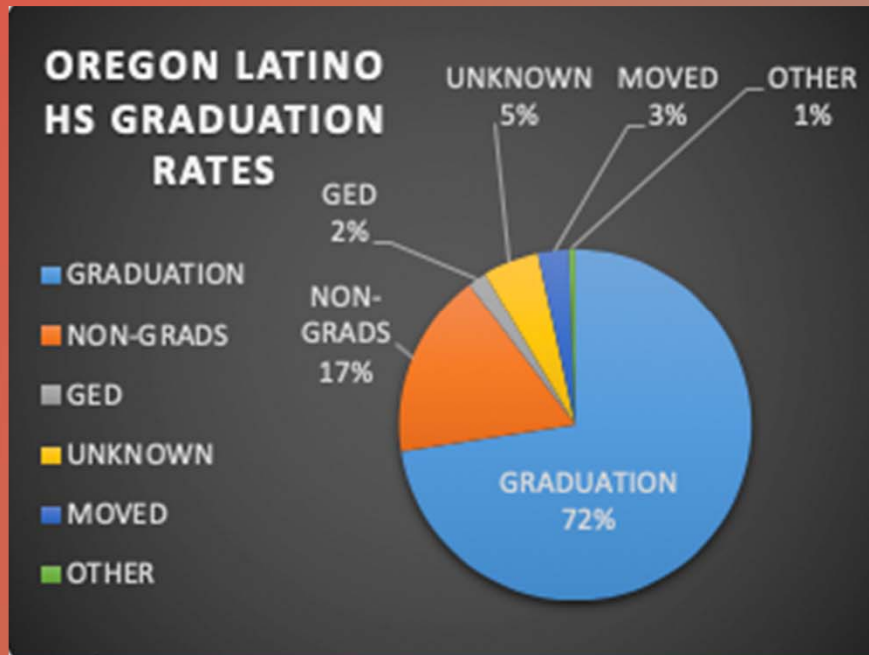
SOU Foundation

6.5 Million New
Scholarship
Funding

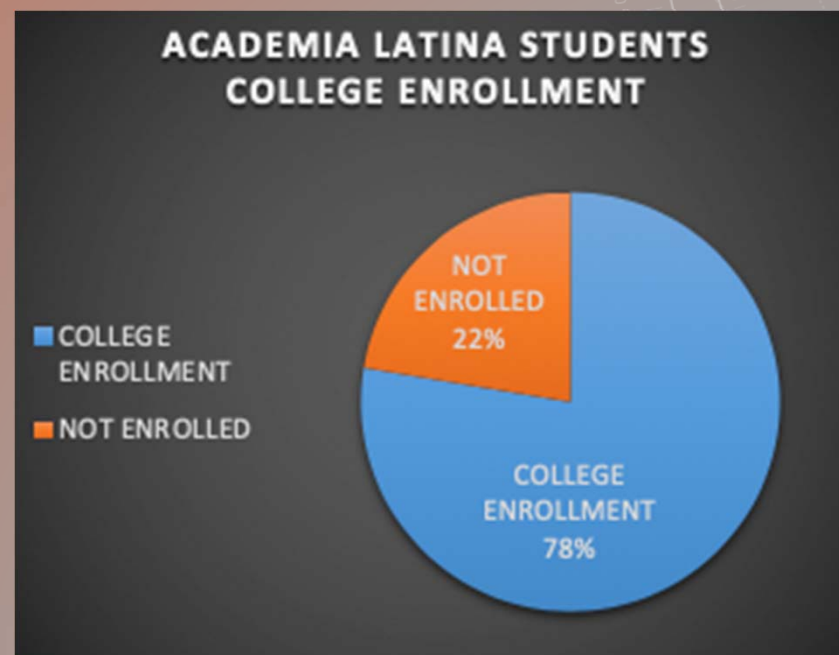
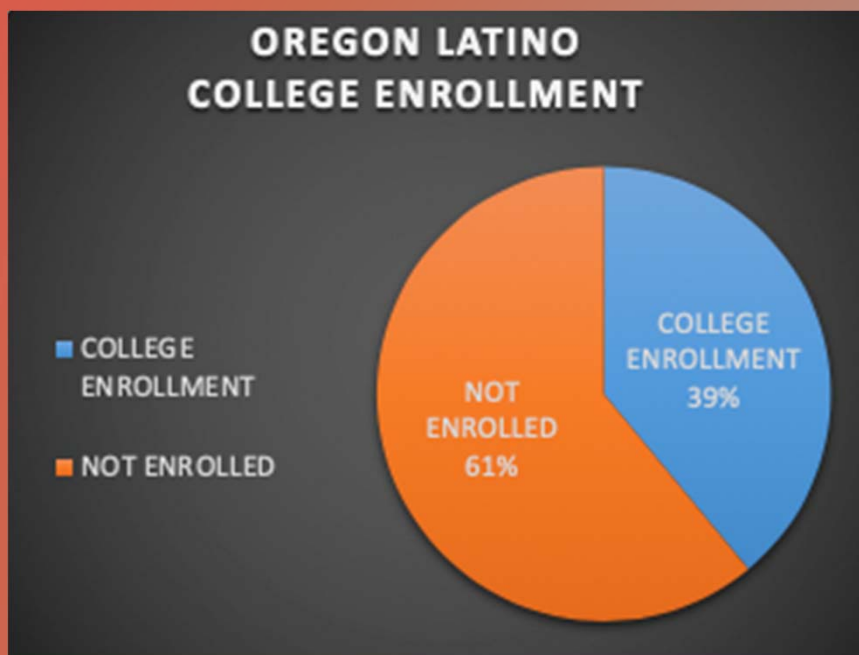
23 New Scholarship
Endowments



Successful Pipeline Programs



Successful Pipeline Programs



Goals 1 through 22 included in filter below.

Strategic Planning Overview

FILTERS

Strategic Goal

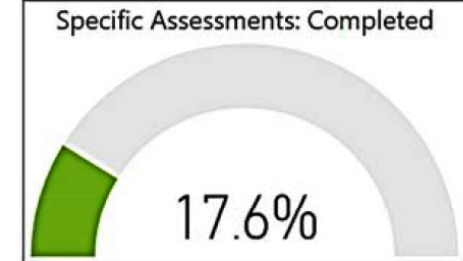
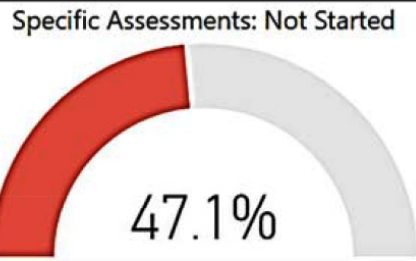
Multiple selections

Assessment Years

Multiple selections

30

Objectives



51

Specific Assessments

29

Academic Program Outco...

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

30

Support Program Outcom...

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.



The background features a gradient from dark red on the left to light grey on the right. Overlaid on the red side are several circular and semi-circular patterns, some with arrows indicating direction. A prominent scale-like arc is visible, with numerical markings from 140 to 260. A thin, curved line extends from the left side across the middle of the page.

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

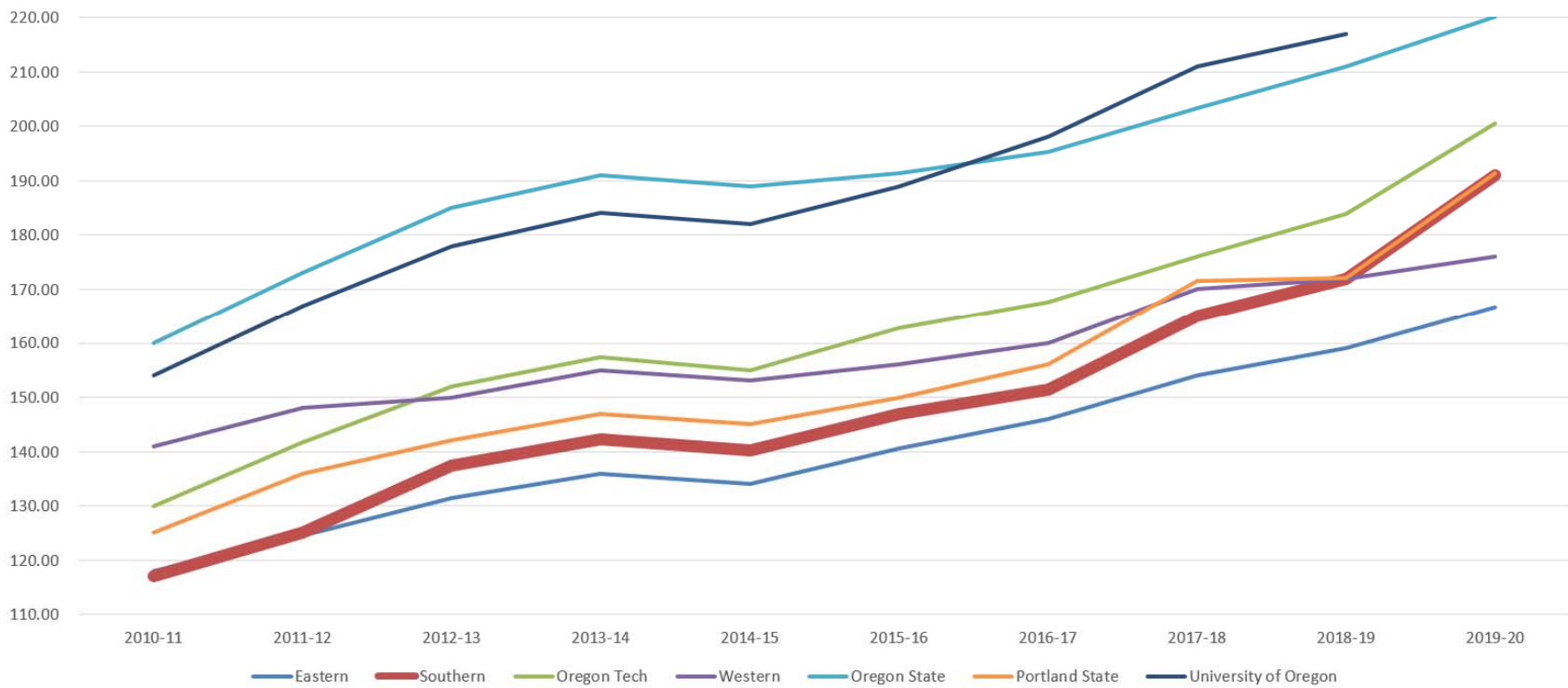
Tuition	Current/Term	Curr/AY	Prop/AY	Inc \$/AY	Inc %
Resident Undergrad	\$ 2,580.00	\$ 7,740.00	\$ 8,591.40	\$ 851.40	11.0%
Mandatory Fees					
Student Incidental	\$ 345.00	\$ 1,035.00	\$ 1,080.00	\$ 45.00	4.35%
Student Rec Center	\$ 95.00	\$ 285.00	\$ 285.00	\$ -	0.00%
Student Health Services	\$ 140.00	\$ 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**