



OFFICE OF THE BOARD OF TRUSTEES

Public Meeting Notice

May 14, 2020

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 (Videoconference)

The Finance and Administration Committee of the Southern Oregon University Board of Trustees will hold a regular meeting by videoconference 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 the Higher Education Coordinating Commission. There will be a discussion and action on capital projects expenditure authorizations and on tuition and fees for academic year 2020-2021. There also will be a COVID-19 update; a budget update and review of the pro forma; and a discussion of financial metrics.

The meeting will occur as follows:

Thursday, May 21, 2020

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

Visit governance.sou.edu for meeting materials.

To join or view the proceedings, visit <https://sou.zoom.us/j/94481078608> at the time of the meeting.

If special accommodations are required or to provide written public comment or testimony, please contact Kathy Park at (541) 552-8055 at least 72 hours in advance.

Public Comment

Members of the public who wish to provide public comments for the meeting are invited to submit their comments or testimony in writing. Please send written comments or testimony to the Board of Trustees email address: trustees@sou.edu. Public comments also may be sent to the board via postal mail addressed to SOU Board of Trustees, 1250 Siskiyou Boulevard, Ashland, OR 97520.



Board of Trustees
Finance and Administration Committee Meeting
May 21, 2020

Call to Order / Roll / Declaration of a Quorum



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

**Thursday, May 21, 2020
4:00 p.m. – 6:00 p.m. (or until business concludes)
DeBoer Room, Hannon Library**

AGENDA

Persons wishing to participate during the public comment period shall sign up at the meeting.
Please note: times are approximate and items may be taken out of order.

	1	Call to Order/Roll/Declaration of a Quorum	Chair 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 20, 2020 Meeting Minutes	Chair Clough
10 min.	4	Vice President's Report	Greg Perkinson, SOU, Vice President for Finance and Administration
	4.1	Committee Dashboard	
	4.2	Higher Education Coordinating Commission Update	
15 min.	5	Action, Information and Discussion Items	
	5.1	Capital Projects Expenditure Authorizations (Action)	Greg Perkinson
10 min.	5.2	COVID-19 Financial Update	Greg Perkinson
20 min.	5.3	Budget Update and Review of Pro Forma	Greg Perkinson
60 min.	5.4	Tuition and Fees for Academic Year 2020-2021 (Action)	President Schott; Britney Sharp, ASSOU, President; Greg Perkinson; Dr. Susan Walsh, SOU, Provost

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

**Thursday, May 21, 2020
4:00 p.m. – 6:00 p.m. (or until business concludes)
DeBoer Room, Hannon Library**

AGENDA (Continued)

5 min.	5.5 Discussion of Financial Metrics	Chair Clough; Greg Perkinson
	5.6 Future Meetings	Chair Clough
6	Adjournment	Chair Clough

Public Comment

Consent Agenda

**Board of Trustees
Finance and Administration Committee Meeting
Monday, April 20, 2020**

MINUTES

Call to Order/Roll/Declaration of a Quorum

Committee Members:

Sheila Clough	Present	Paul Nicholson	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 4:04 p.m. in the DeBoer Room of the Hannon Library. The secretary recorded the roll and a quorum was verified.

Other trustees in attendance: Lyn Hennion, President Linda Schott, janelle wilson

Other attendees included: Greg Perkinson, Vice President for Finance and Administration; Dr. Neil Woolf, Vice President for Enrollment Management and Student Affairs; Jason Catz, General Counsel; Dr. Susan Walsh, Provost; Jeanne Stallman, Associate Vice President for Government and Corporate Relations; Sabrina Prud'homme, Board Secretary; Josh Lovern, Budget Office; Britney Sharp, ASSOU President; and Kathy Park, Office of the Board Secretary.

Public Comment

There was no public comment.

Consent Agenda

Trustee AuCoin moved to approve the consent agenda as presented. Vice Chair Nicholson seconded the motion and it passed unanimously.

Vice President's Report

Committee Dashboard

Greg Perkinson reviewed key elements in the financial dashboard included in the meeting materials. The current fiscal year cash is greater than the target but it is a timing issue. Student credit hours (SCH) is below the previous two years by about 7 percent. Regarding Education and General (E&G) expenses year-to-date, labor and Other Personnel Expenses are higher than last year but below the burn rate; Supplies and Services are below that of last year and below the burn rate.

HECC Update and Other General Updates

Turning to the HECC update, Mr. Perkinson said Jason Catz is SOU's primary representative, he [Mr. Perkinson] is the alternate, and Britney Sharp is the student representative on the Student Success and Completion Model (SSCM) work group. At the group's last meeting, there was a proposal to delay the timing of the discussion of the model's key elements, effectively splitting work into two phases and pushing key

decisions into the future. President Schott requested a meeting with Ben Cannon and Jim Pinkard to discuss how SOU interprets the HECC's data and find common ground on data presented, which will culminate in SOU's recommendation that the HECC allocate SOU additional mission differentiation funding. Mr. Catz added that the work rescheduled the next meeting for May.

Responding to Chair Clough's inquiry regarding the impact on the receipt of COVID-related relief funds, Mr. Perkinson said the funding model would not adversely affect SOU as it is being considered for such funds. SOU will receive \$3.4 million in CARES Act funding, which is directly earmarked for SOU. Responding to Vice Chair Nicholson's later follow up inquiry, Mr. Perkinson and Mr. Catz said the CARES Act allocation is in no way based on the SSCM, rather it is based on PELL-eligible students. Additionally, SOU is engaged in political advocacy to get a share of the \$32 million Governor Brown is allocating to education across the state. President Schott added that she and Sandra Slattery contacted Ben Cannon seeking special consideration, expressing concerns about the decline in the local economy, tourist dollars, and SOU students leaving. Responding to Trustee AuCoin's inquiry, Jeanne Stallman said she has been sending a weekly email message to the Southern Oregon delegation to keep them apprised of how SOU has been affected.

Discussing the potential COVID-19 financial impacts on SOU, Mr. Perkinson reviewed the figures provided in the survey Jim Pinkard created to collect data on short- and long-term impacts, as included in the meeting materials.

Action, Information and Discussion Items

Update on Tuition and Fees for Academic Year 2020-21

Chair Clough reminded the committee members that the committee should be approving tuition and fees at this meeting. However, because of COVID challenges and timing issues, the committee will do that in its May 21 meeting. Mr. Perkinson provided an update on the tuition and fees process, saying the ASSOU Senate has approved fees and the Tuition and Advisory Council (TAC) has been meeting regularly. In last week's straw poll at the TAC, the members were most comfortable with a tuition increase below 5 percent and, when looking at the financials, they recognized the increase should be more like 7 percent. If the CARES Act funding of \$1.7 million was not included in the pro forma, the increase would need to be 15 percent. Mr. Perkinson said data would be available later in the day from the end of the add/drop period and it's the last day to break housing contracts, which will firm up revenue data. About 25 percent of students are expected to remain in housing.

Regarding the student fee process, ASSOU President Britney Sharp said the students were very reluctant to approve the proposed fees. At an emergency ASSOU Senate meeting, Josh Lovern and Taylor Burke explained that ASSOU would be unable to predict its numbers and deficits. When calculating its initial allocations, ASSOU used a 9 percent decrease in enrollment, which is more than SOU's projection of a 7 percent decrease. The ASSOU Senate approved the allocation list.

Mr. Perkinson detailed the next steps: finalize the SCH data, update the pro forma, refine revenue projections, submit the TAC recommendation to President Schott,

present the president's recommendation to the committee, and present it to the board in May. Budget personnel will continue to work the intricacies of SOU's COVID-19 response. President Schott added that there are two factors involved in the tuition increase: what SOU needs financially and what politically is possible; she said she thought the times will not bear what SOU actually needs.

Discussion of Financial Metrics

Continuing the dialogue on financial metrics, Greg Perkinson mentioned the strategic, operational, and tactical levels of managing a metrics program. He would expect the board and president to focus principally at a strategic level; the president and vice presidents on the operational level; and directors on the tactical level.

Mr. Perkinson then reviewed the high level framework the HECC finance director presented to commissioners and said SOU currently collects about 75 percent of these measures, many of which are annual snapshots. He said he no longer would resist the use of these indicators, as the HECC is going to continue to use them. These numbers come from the audited financial statements and are based on accounting principles that can change year after year.

When using the composite financial index, Mr. Perkinson said context is important, which the HECC did not use in its assessment. For each university, there is a story to explain each number. Mr. Perkinson then reviewed the sample strategic measures, included in the meeting materials, including the total E&G spending per full-time enrollment and SSCM degree value. Discussion ensued on how degrees are valued and tuition revenue is analyzed.

Responding to Vice Chair Nicholson's inquiry, Mr. Perkinson said if SOU had received the additional \$3 million that EOU has received for the past several years, SOU's ending fund balance would be 25 percent. President Schott added that at that level, the board may have decided that a 15 percent ending fund balance is needed and SOU would not have needed to drive tuition up. The question is whether this is equitable for SOU's students and families.

Reflecting on Trustee Lightman's earlier comment, Chair Clough said the committee is being asked to contemplate different metrics. However, if the HECC will continue to use these metrics, she is not sure it matters what the committee wants because the university is still accountable to these metrics. President Schott added that SOU should continue to monitor the metrics the HECC uses but, since those do not tell the entire story, SOU should also identify what else is important to monitor.

Responding to Trustee Lightman, President Schott and Mr. Perkinson said the Presidential Task Force on Financial Sustainability is evaluating and exploring options for revenue generation.

Concluding the discussion on this agenda item, Chair Clough said she felt the committee has a good sense of the HECC's measures and now the trustees need to discuss the measures they find most useful in measuring SOU's performance. Eventually, Board Chair Hennion will want a recommendation from the committee.

President Schott added that financial performance is important for this committee but there are other important measures, such as academic quality and performance.

Budget Update and Review of Pro Forma

Greg Perkinson highlighted some recent changes to the pro forma as Josh Lovern utilized the interactive pro forma. The \$1.7 million in CARES Act funding appears as one-time funding. The adjustment to labor represents the expected value of the hiring freeze implemented the previous week. COVID-19 has resulted in some unanticipated gains and losses (e.g., reduced travel expenses and reduced income for housing). The changes result in an 8.5 percent ending fund balance, assuming all of the \$1.7 million in CARES Act funding is rolled into E&G. Mr. Perkinson said, however, there will be hard choices next year regarding budget cuts. President Schott and Mr. Perkinson clarified that the 8.5 percent ending fund balance includes only half of the phase two cost reductions.

Responding to Trustee Franks' comment, Mr. Perkinson summarized the financial impacts of COVID-19. SOU is down close to \$1 million in lost revenue for the spring term. The \$2.9 million in lost auxiliary revenue is a combination of dining, housing, athletics and conferences. SOU expected to spend \$500,000 to transition to remote delivery; that number is overstated and may come in lower. Cleaning costs are \$50,000 and other costs are \$70,000. COVID-19 is estimated to result in a \$2.3 million loss for the current fiscal year. Responding to Chair Clough's inquiry, Mr. Perkinson said the lost auxiliary revenue is not included in the pro forma, which positively impacts the 8.5 percent ending fund balance. He mentioned the actions taken by the dining services provider and housing to cut costs and there are more offsets to come.

President Schott said personnel have been focused on this fiscal year and how to close with a balanced budget and inch the ending fund balance up a bit. Thinking about next year is very tough because of the many unknown variables.

Mr. Perkinson made a last point on CARES Act funding, saying the remaining \$1.7 million is tied to student grants. SOU is working on the methodology to get it to the students. One idea is to issue some in the spring and some in the fall. The funding must be issued within one year. President Schott added that the big decision point is whether all of the first \$1.7 million of the institution's share is put in E&G or whether some should be allocated to auxiliaries. This has significant import if it is not allocated all to E&G, more reductions may be needed.

Future Meetings

Chair Clough said the committee's next meeting will be on May 21, followed by a special board meeting the next day.

Adjournment

Chair Clough adjourned the meeting at 5:58 p.m.

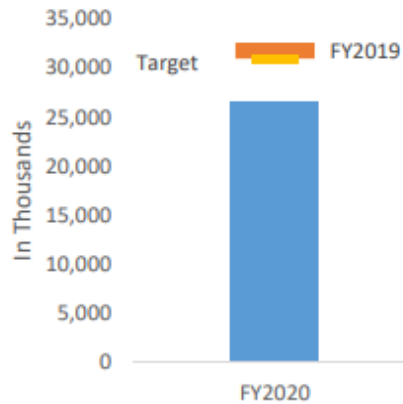
Vice President's Report

Financial Dashboard

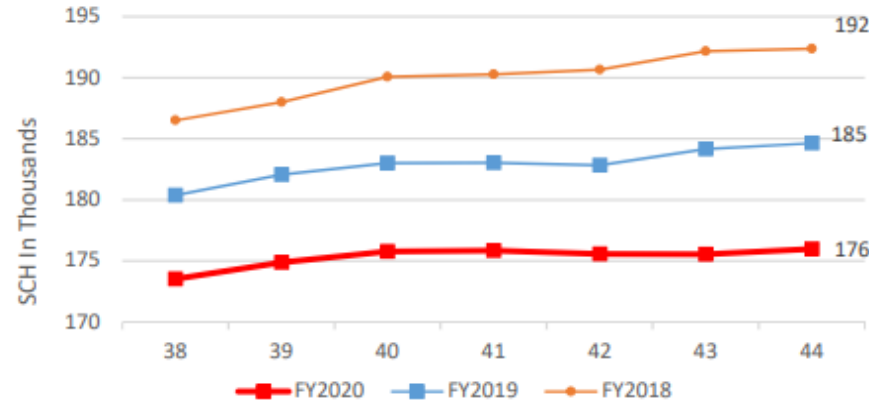
For FY20

As of April 30, 2020

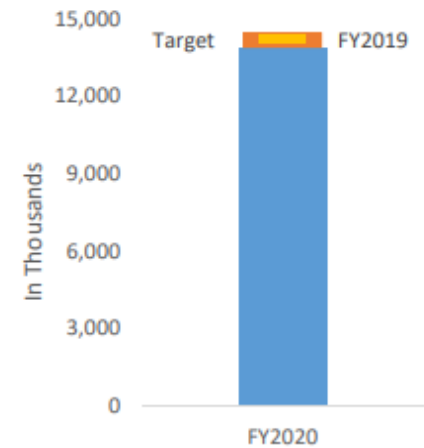
Public University Funds Operating Cash



Total Student Credit Hours by Week of the Fiscal Year

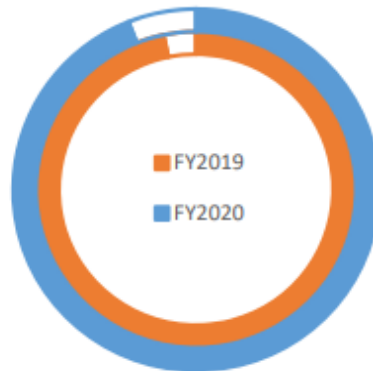


E&G Fund Balance

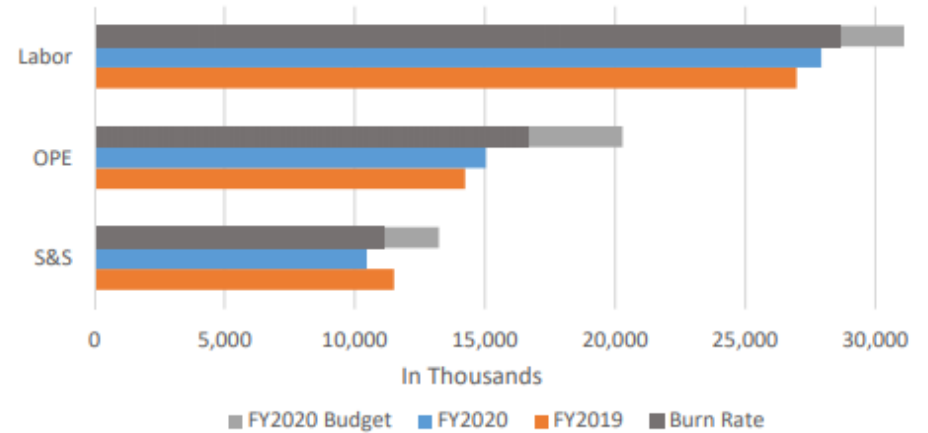


Continuing to Assess the COVID-19 Impacts

E&G YTD Revenues



E&G YTD Select Expenses



HECC Update

<https://www.oregon.gov/highered/about/Pages/current-materials.aspx>

- Tuition and Fees comparison

<https://www.oregon.gov/highered/about/Documents/Commission/FA/2020/May%2013%202020/4.0%20FA%20Docket%20Item%20-%20Univ%20Tuition.pdf>

- Overview of Capital Project Submissions

<https://www.oregon.gov/highered/about/Documents/Commission/FA/2020/May%2013%202020/5.0%20FA%20Docket%20Item%20-%20Capital%20Project%20Submissions.pdf>

- Consolidated Funding Request

- <https://www.oregon.gov/highered/about/Documents/Commission/FA/2020/May%2013%202020/6.1a%20Oregon%20Public%20Universities%202021-2023%20Combined%20Funding%20Request.pdf>

- SSCM – work group delayed, transitioned to 2-phased approach

<https://www.oregon.gov/highered/about/Documents/Commission/FA/2020/May%2013%202020/7.0%20FA%20Docket%20Item%20-%20SSCM%20Review.pdf>

Capital Projects Expenditure Authorizations (Action)

****This section to be updated****

Capital Projects Expenditures - Request

Britt Hall Project

	Est. Project Cost
826061 - Britt Hall Renovation 2017 XI-Q Bond	\$ 4,717,500.00
826063 - Capital Repair 2017-19 XI-Q Bond	\$ 2,283,570.00
826073 - Capital Improvements XI-Q	\$ 500,000.00
Total	\$ 7,501,070.00

Taylor Hall Project (Deferred Maintenance)

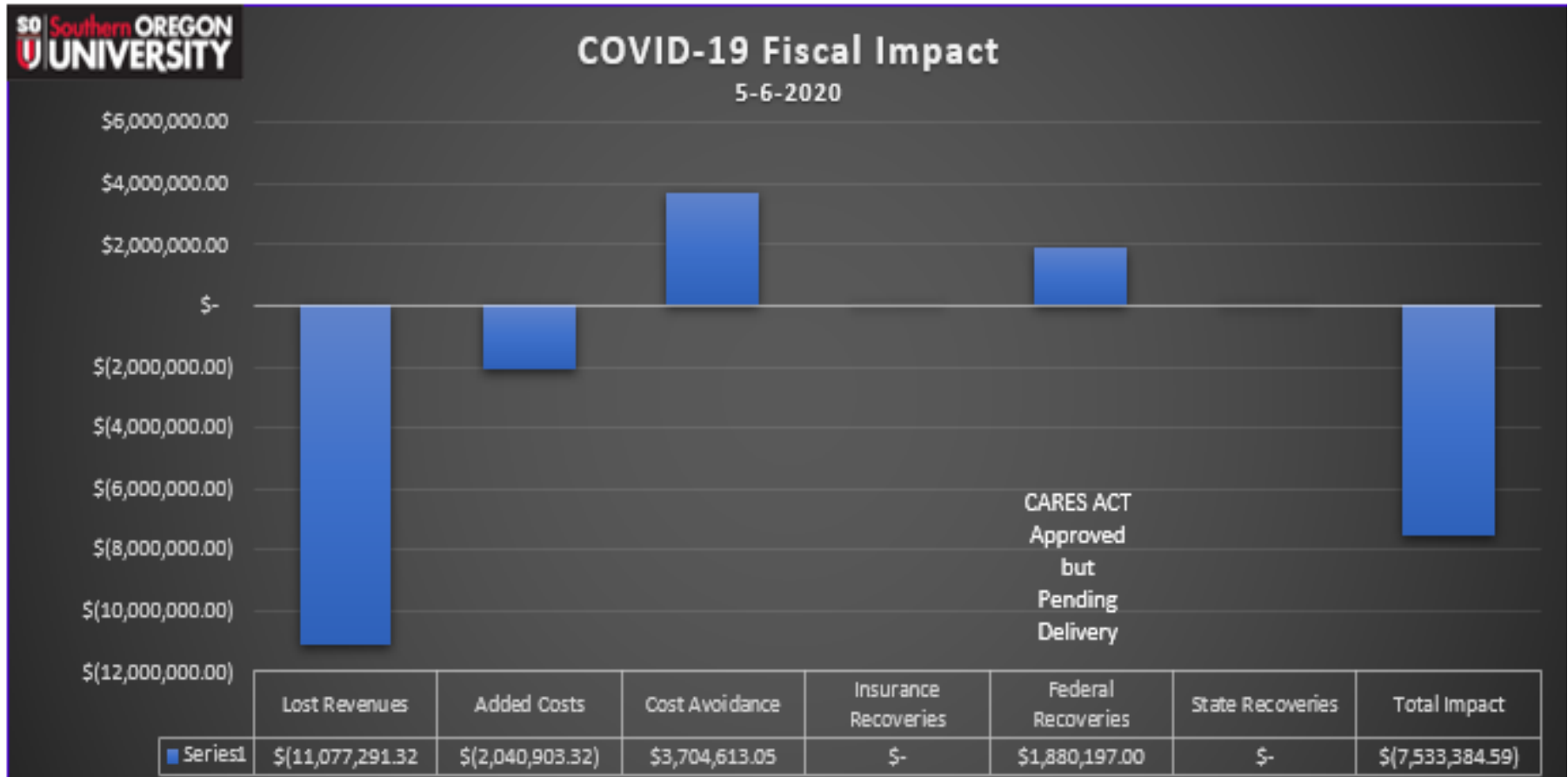
Taylor Hall Bathroom and Public Space Improvements (This Summer)	
826073 - Capital Improvements XI-Q	Total
	\$ 800,000.00

Central Hall Capital Improvements

826072 - Central Hall Capital Improvements 2019 XI-Q	\$ 6,000,000.00
826073 - Capital Improvements XI-Q	\$ 1,000,000.00
Total	\$ 7,000,000.00

COVID-19 Financial Update

SOU Continues to Evaluate Impacts



COVID-19 Financial Impacts

- Decrease in State revenues is driving a 8.5% budget rescission
- SOU will lose \$3.1M in second half of biennium (next Fiscal Year)
- SOU will lose most, if not all of remaining Sports Lottery funding (\$150k this FY; and as much as \$1.2M next FY)
- Significant impacts to Auxiliaries (Housing, Athletics and Student Recreation as shown on next slide)

What are We Going to Do?

- Implement cost reduction in **phases**
- Initially: 20% FTE reduction began 5/1/20 and utilizes the “Oregon Workshare” Program (not laid off, full benefits, eligible for UI)
 - This is a furlough (based on lack of funding; or lack of work)
 - Envision working 4 8-hour days; versus 4 10-hour days this summer
 - A small number of our co-workers aren’t fully utilized due to modified operations; and will have a 40% reduction
 - Note: President to take a 25% pay cut
- Then (after Federal UI ends on 7/25/20), continue to monitor / assess
 - Workshare program runs through 12/31/20
 - Focus: monitoring health and work conditions
 - Key inflection point(s): determining when and how to re-open
- Ultimately, there will be a balance of continued "shared sacrifice" AND strategic reductions, once they can be thoughtfully determined

Who is Impacted?

- Everyone. The central theme is shared sacrifice.
- Classified Staff – 180 regular (full-time) co-workers
- Administrative Staff – 210 regular co-workers
- Faculty – TBD; rapidly transitioned to remote learning; under contract through 6/15....so, negotiating options for this FY and next FY
- Note: Student employees and some part-time co-workers not affected, depending on work assignment

When?

- Time is of the essence. Over \$3.5M in lost revenues now; with projected losses totaling \$7.3M
- Applied on 5/1/20. Workshare program application submittal date ‘starts the benefits clock’
 - (Note: backlog in unemployment processing supports starting employee benefits ASAP; Federal stimulus for UI only available through 7/25/20)
- Employee letters were released on 5/1/20

Why?

- Over \$7.3M in lost revenues projected
- Workshare keeps employees on the payroll with full benefits; and eligible for state and federal UI
- Avoids laying off 101 employees

Key point for managers: Do NOT issue work on an employee's furlough day

COVID-19 Financial Update, Part II

CARES Act Funding Allocation

Summary of CARES Act Funding in FY20

	Impact in FY20	CARES 2 Allocation	Result in FY20	Notes
Education & General (E&G)	(\$ 750k)	\$ 250k	(\$ 500k)	Reimburses costs to change delivery of instruction and provide faculty development
Auxiliary and Non E&G	(\$4.85M)	\$1.88M	(\$3.5M)	Reimburses institutional funds provided for student refunds (housing, dining, etc.)
Total	(\$5.6M)	\$2.1M	(\$3.5M)	Does not address FY21 projections for enrollment or budget rescission

Notes:

CARES part 1: \$1.7M – directly paid to students through Financial Aid system

CARES part 2: \$1.7M – Institutional relief (very specific criteria)

\$.169k – Strengthening Institutional Programs (SIP)

\$.224k – Support to JPR from Corp Public Broadcasting (Designated Ops)

Budget Update and Review of Pro Forma

Road Map

- Budget approved in October 2019
- Pro Forma (as of 5/12/2020)
 - *Committee to review dynamic pro-forma in the meeting*

Pro Forma as of 10/8/19

2017-19 Biennium

2019-21 Biennium

2021-23 Biennium

Education and General

(in thousands of dollars)

Revenue

State Appropriations: SSCM

State Appropriations: ETIC/SELP

One-time Funding

Total State Funding

Tuition

Fees

Raider Aid

Oth tuition adjustments

Tuition, net of Raider Aid

Misc. Other Revenue

Other Adjustments to Revenue

Total Revenues

Personnel Services

Faculty

Admin

Classified

Student (& Other)

Labor

Retirement (PERS + ORP)

PEBB

Other

OPE

Net Personnel

Supplies & Services

Total Supplies and Services

Cost Reductions and Savings

Total Expenditures

Net from Operations Before Transfers

Net Transfers

Change in Fund Balance

Beginning Fund Balance

Ending Fund Balance

% Operating Revenues

2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
Actual	Actual	Budget & Projections	FORECAST	FORECAST	FORECAST
(000's)	(000's)	(000's)	(000's)	(000's)	(000's)
20,840	21,270	22,696	23,880	25,509	26,550
433	381	376	377	376	376
	0	672	672		
21,273	21,651	23,744	24,929	25,885	26,926
37,759	37,709	40,047	40,128	40,366	40,835
3,244	3,294	3,547	3,828	4,163	4,552
(4,243)	(3,638)	(3,600)	(3,612)	(3,633)	(3,675)
36,760	37,365	39,994	40,345	40,896	41,711
2,804	3,013	2,950	3,016	3,084	3,154
60,837	62,030	66,688	68,290	69,866	71,791
(15,044)	(15,801)	(16,560)	(17,071)	(17,415)	(18,025)
(8,854)	(9,230)	(10,053)	(10,311)	(10,591)	(10,763)
(6,436)	(6,484)	(6,824)	(6,884)	(6,965)	(7,033)
(1,430)	(1,500)	(1,615)	(1,723)	(1,832)	(1,940)
(31,763)	(33,014)	(35,052)	(35,988)	(36,803)	(37,760)
(6,841)	(7,007)	(9,143)	(9,387)	(9,603)	(9,853)
(7,332)	(7,306)	(7,687)	(8,071)	(8,475)	(8,899)
(2,839)	(3,018)	(3,501)	(3,595)	(3,676)	(3,771)
(17,012)	(17,331)	(20,331)	(21,053)	(21,754)	(22,523)
(48,775)	(50,345)	(55,383)	(57,042)	(58,556)	(60,282)
(9,287)	(11,732)	(11,116)	(11,366)	(11,622)	(11,883)
(9,287)	(11,732)	(11,116)	(11,366)	(11,622)	(11,883)
		2,435	3,150	3,475	3,750
(58,062)	(62,077)	(64,064)	(65,258)	(66,703)	(68,416)
2,775	(47)	2,624	3,032	3,162	3,376
(2,481)	(1,739)	(2,643)	(2,722)	(2,784)	(2,866)
294	(1,786)	(18)	310	379	510
6,844	7,138	5,352	5,333	5,643	6,022
7,138	5,352	5,333	5,643	6,022	6,532
11.7%	8.63%	8.00%	8.26%	8.6%	9.1%

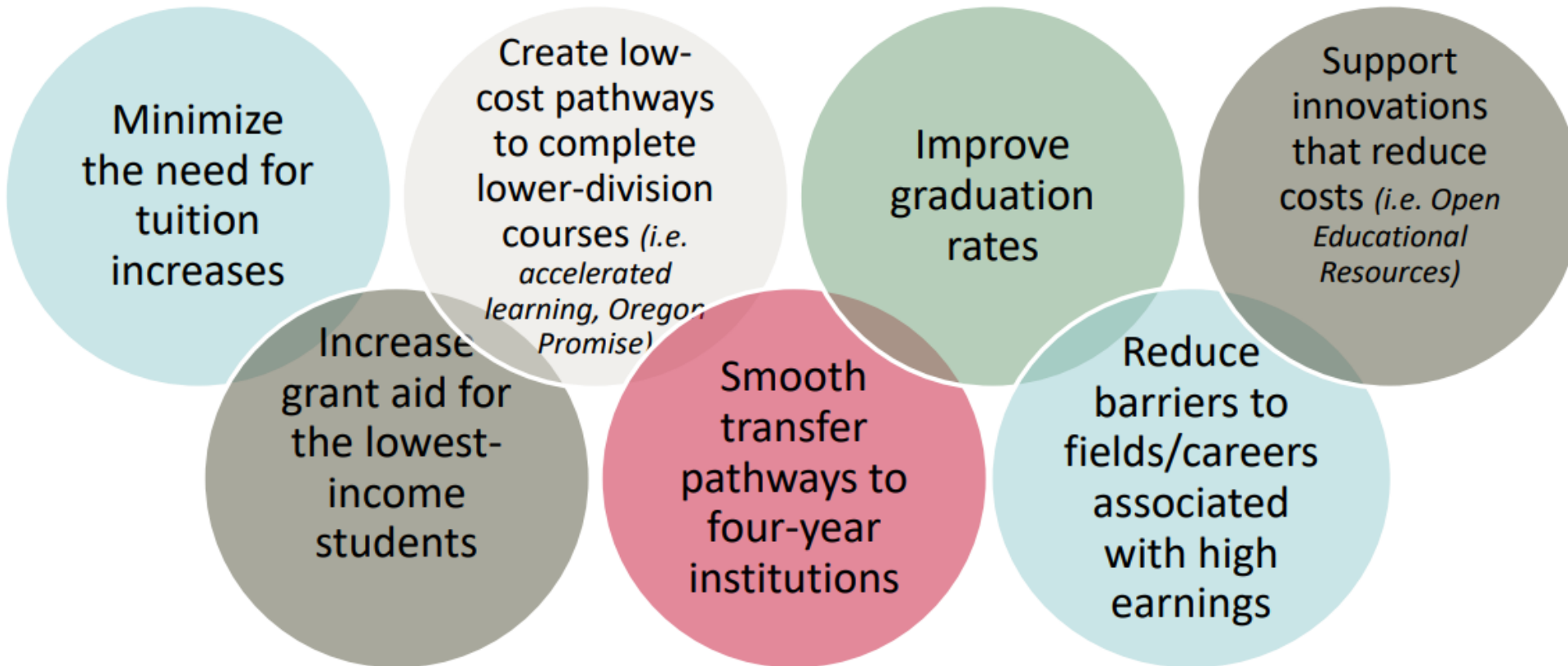
Live Pro Forma

(to be displayed in meeting)

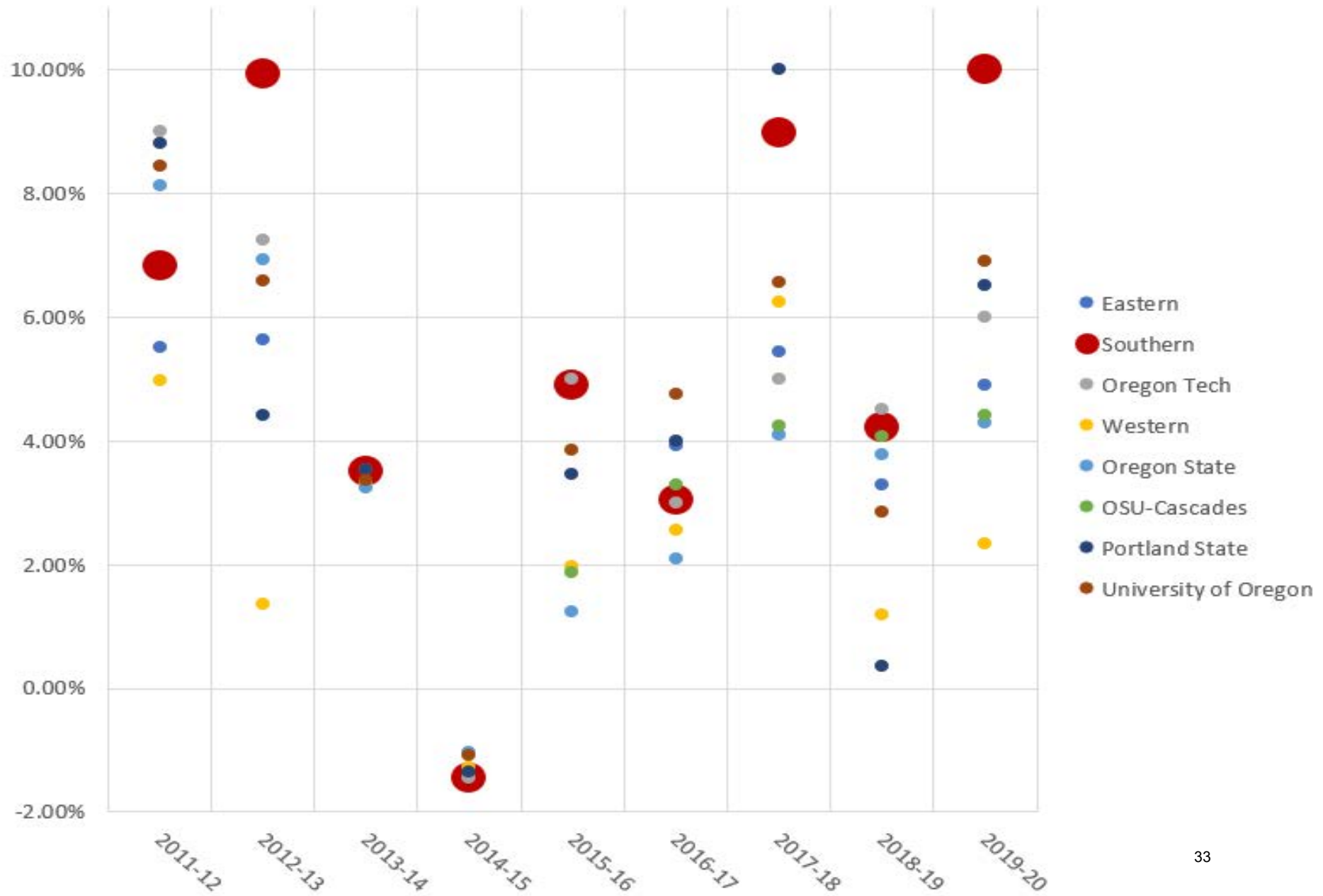
Tuition and Fees for Academic Year 2020-2021 (Action)

Tuition Advisory Council Recommendation

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



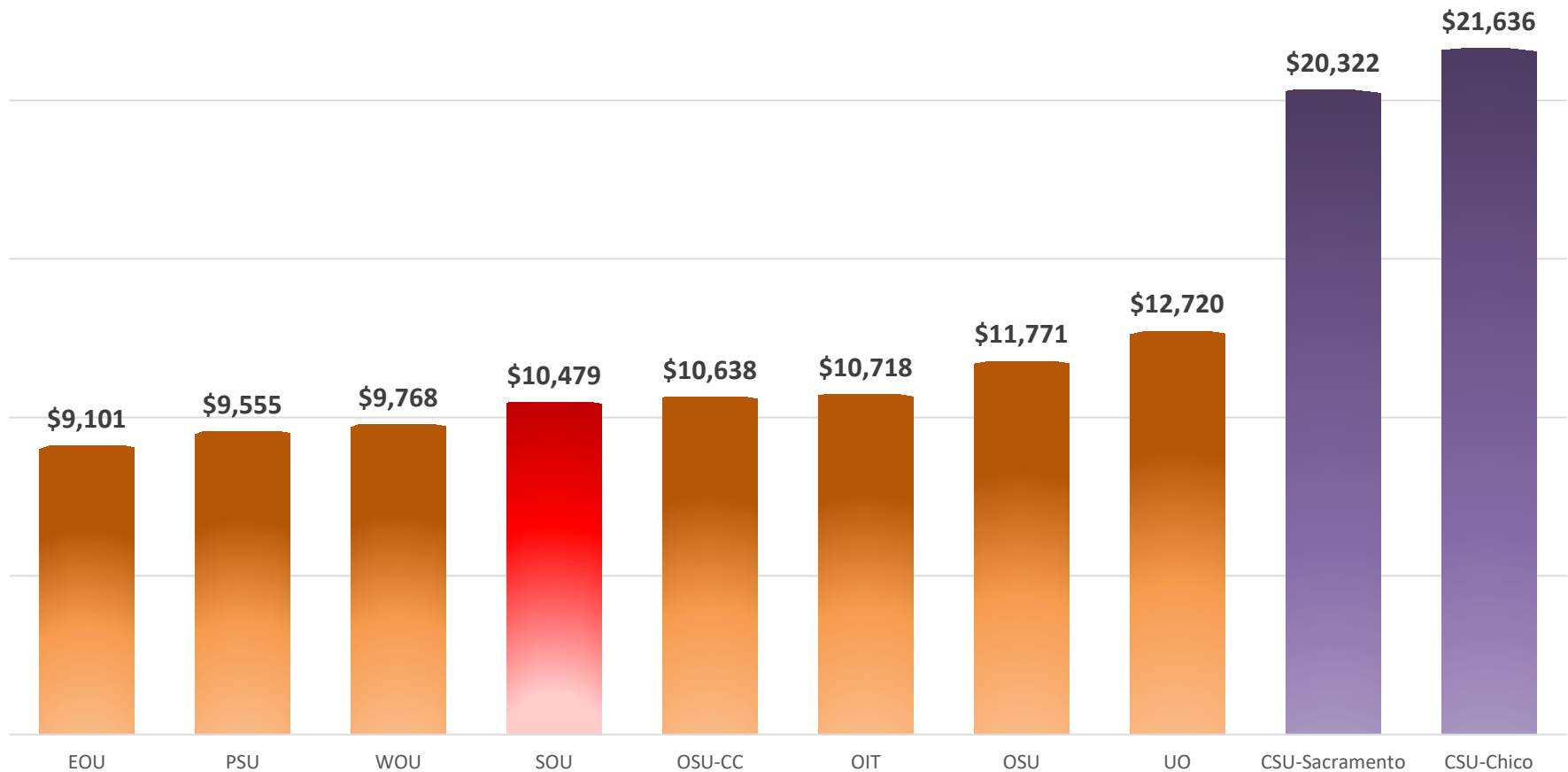
Relative % Change from Prior Academic Year



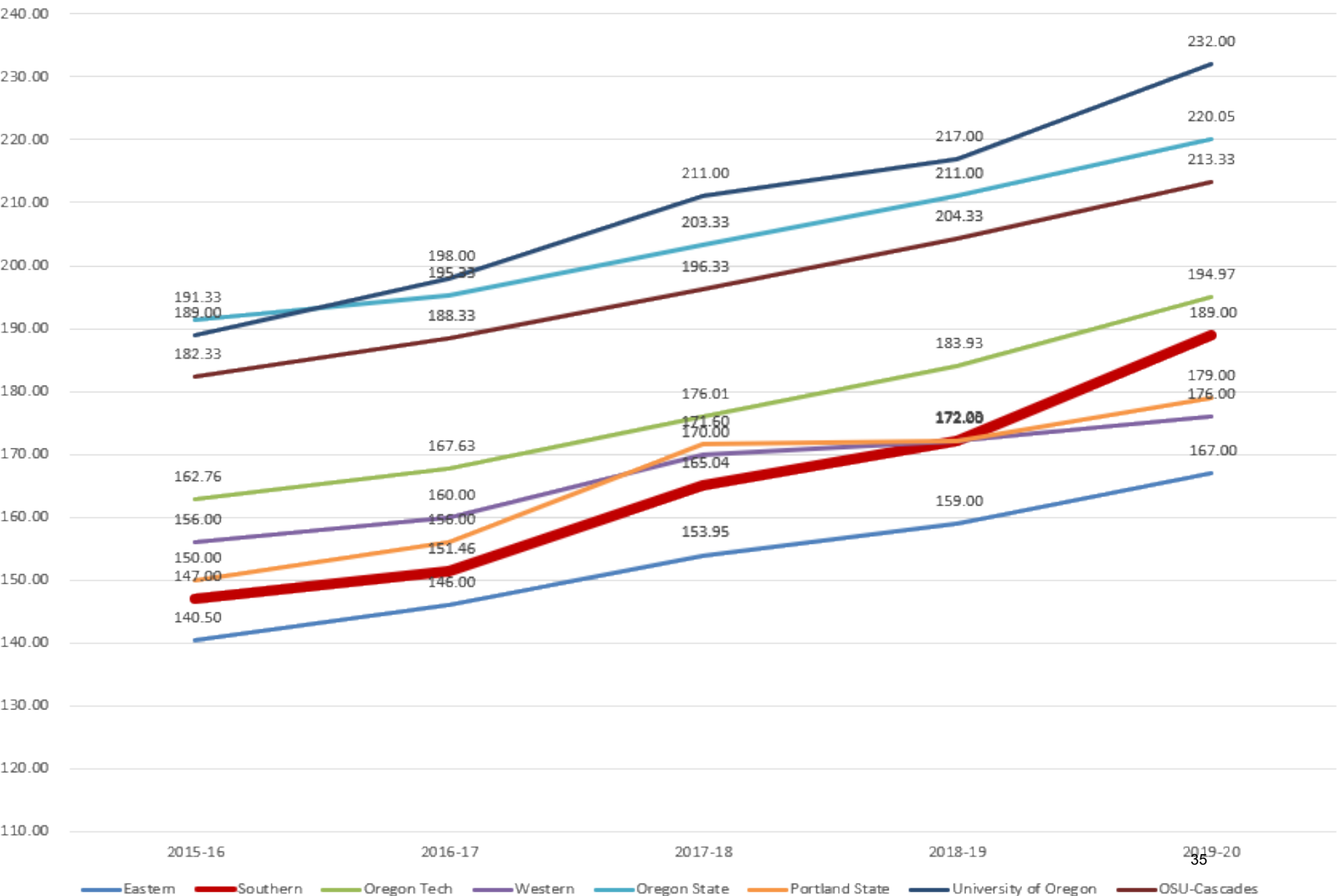
OPUs and CSU Competitors

Academic Year Tuition and Mandatory Fees

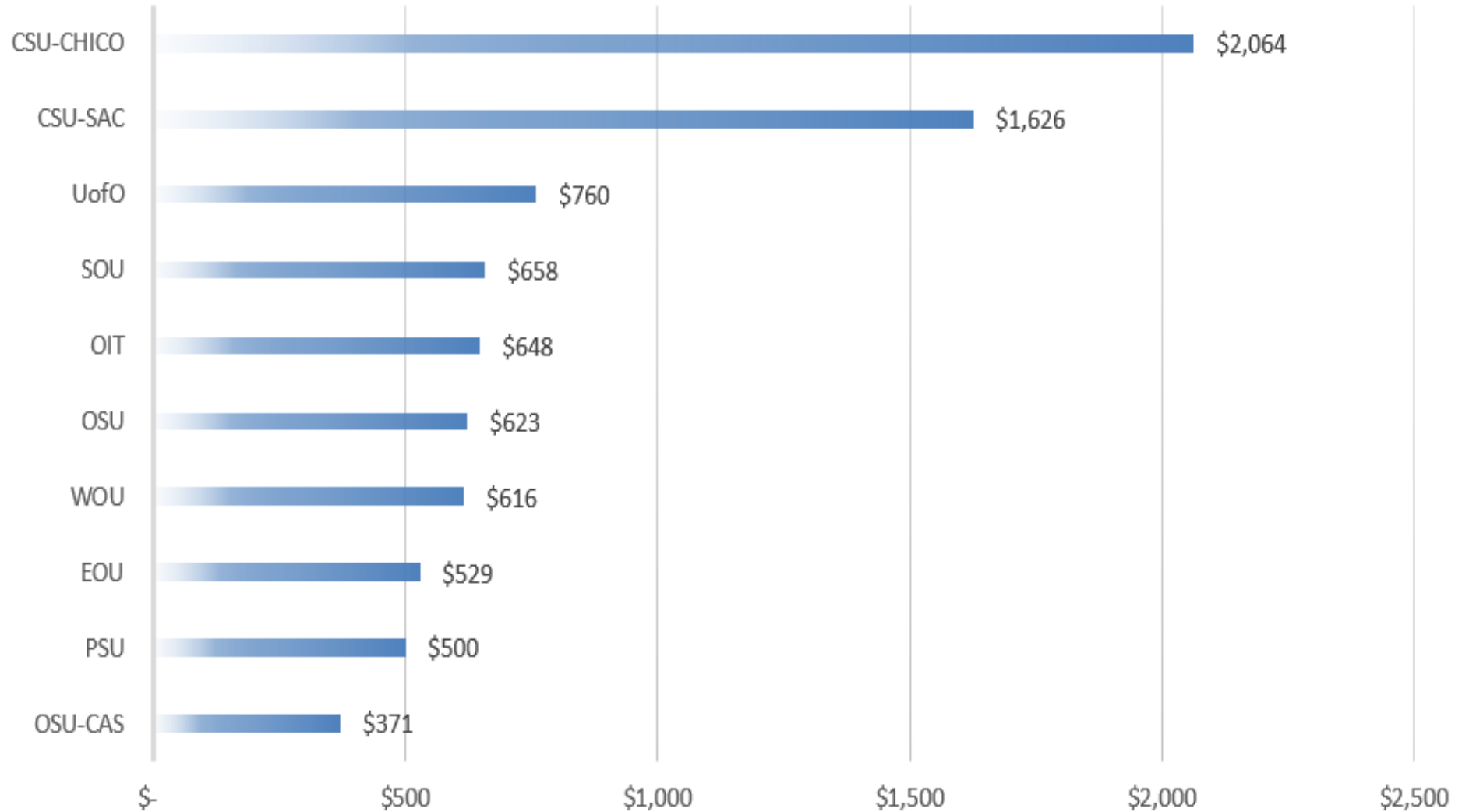
For full-time undergraduates 2019-20 Academic Year



Oregon Resident UG Tuition 2015 - 2020

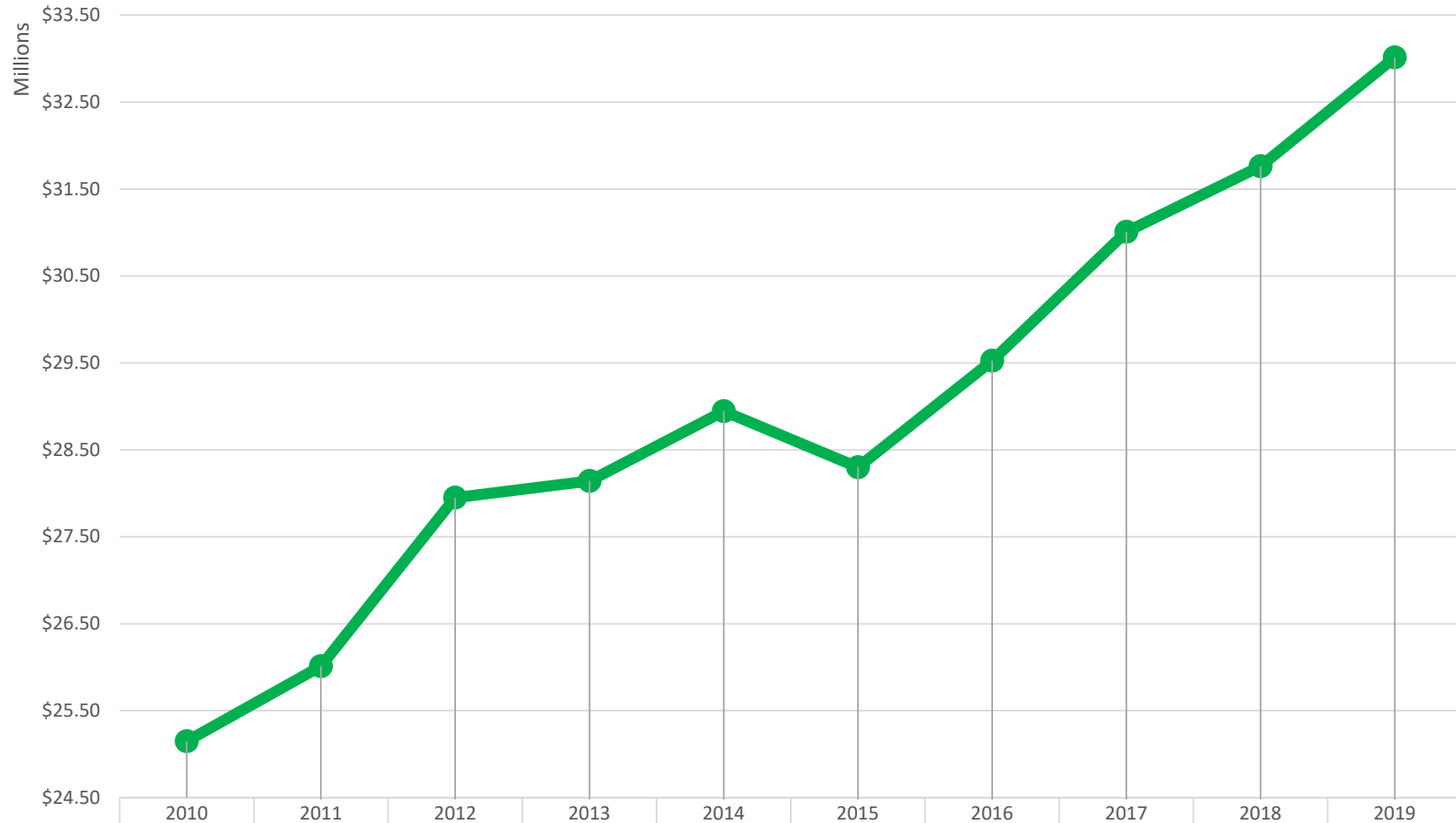


Mandatory Fees per term for Academic Year 2019-20



Expenses Review

E&G Final Expense: Salaries and Wages Fiscal Years 2010 - 2019

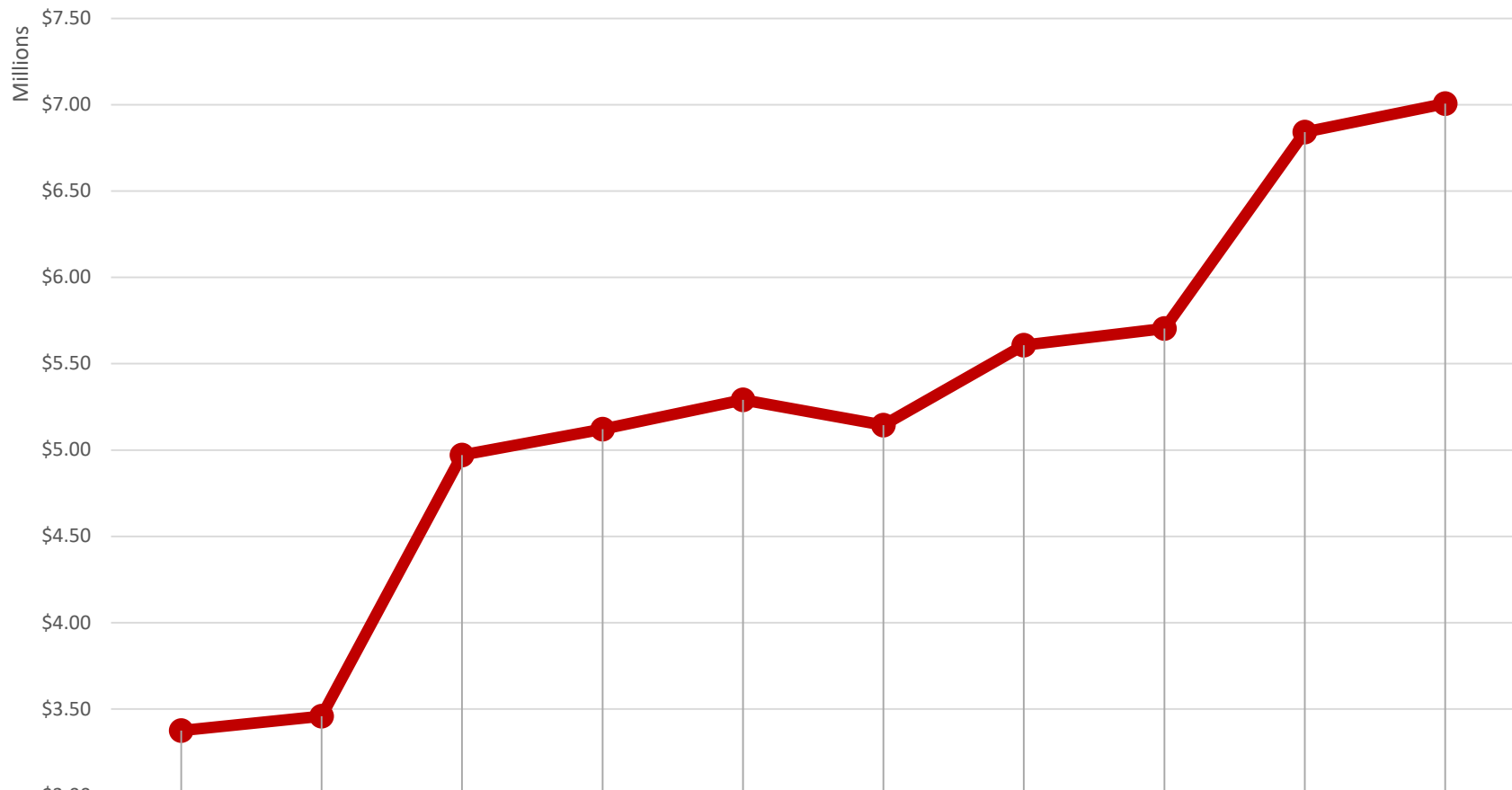


YTD Activity	25,147,222	26,010,478	27,948,424	28,142,357	28,945,734	28,299,240	29,525,422	31,008,806	31,763,153	33,013,914
% Change since 2010		3.43%	11.14%	11.91%	15.11%	12.53%	17.41%	23.31%	26.31%	31.28%
% Change from Prior FY		3.43%	7.45%	0.69%	2.85%	-2.23%	4.33%	5.02%	2.43%	3.94%

Expenses Review



E&G Final Expense: PERS & ORP (Retirement) Fiscal Years 2010 - 2019

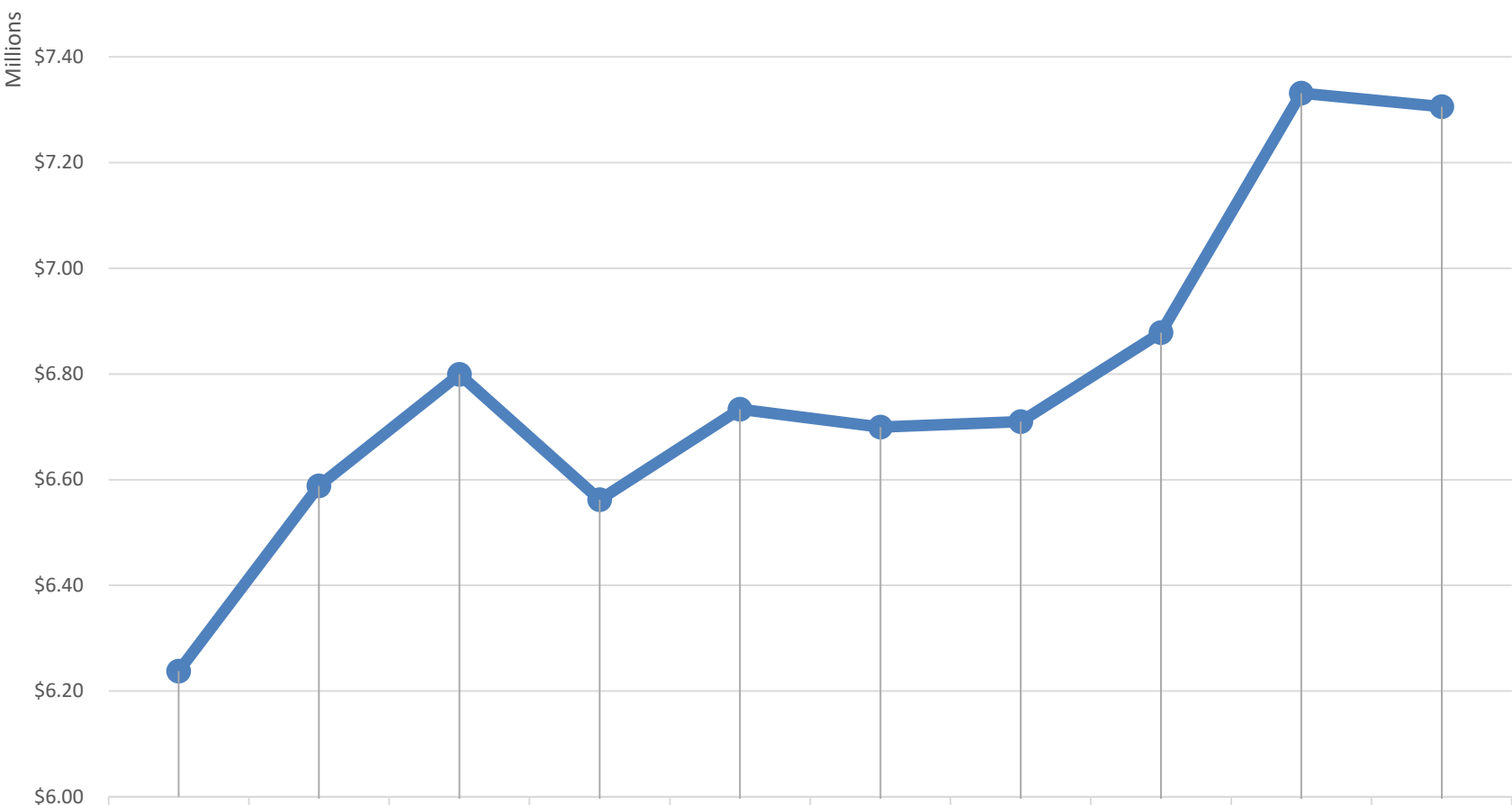


	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
YTD Activity	3,374,245	3,458,588	4,970,999	5,120,350	5,289,936	5,144,287	5,606,961	5,703,198	6,841,000	7,007,008
% from Prior FY		2.50%	43.73%	3.00%	3.31%	-2.75%	8.99%	1.72%	19.95%	2.43%
% Change Since 2010		2.50%	47.32%	51.75%	56.77%	52.46%	66.17%	69.02%	102.74%	107.66%

Expenses Review



E&G Final Expense: PEBB (Health & Life) Fiscal Years 2010 - 2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
YTD Activity	\$6,237,746	\$6,588,542	\$6,799,424	\$6,561,896	\$6,733,296	\$6,699,657	\$6,709,988	\$6,878,403	\$7,331,563	\$7,305,707
% from Prior FY		5.62%	3.20%	-3.49%	2.61%	-0.50%	0.15%	2.51%	6.59%	-0.35%
% Change since 2010		5.62%	9.00%	5.20%	7.94%	7.41%	7.57%	10.27%	17.54%	17.12%

Tuition and Fees Approval Status



- ASSOU Senate approved Fees on 4/10/20
- TAC recommendation to President 5/05/20
- President reviewed relevant information, COVID-19 impacts, formulated recommendation
- Next Actions: present to Finance and Administration Committee for action/recommendation to Board of Trustees for approval.

All Rates Considered by TAC

	2019-20	2020-21				
	Current	Proposed	FY21			
Undergraduate Tuition Rate per SCH	Res: 10.0% Non-Res: 5.0%	Res: 4.99% Non-Res: 4.99%	Difference Per SCH	Difference Per Term @ 15 SCH	Difference Per AY @ 45 SCH	Annual Tuition Cost
01-WUE SCH	\$284	\$297	\$13	\$195	\$585	\$13,365
02-UG Resident SCH (incl. EXRES)	\$189	\$198	\$9	\$135	\$405	\$8,910
02.2-UG JackJo Pledge	\$121	\$127	\$6	\$90	\$270	\$5,715
03-UG Non Resident SCH	\$552	\$580	\$28	\$420	\$1,260	\$26,100
04.1-UG Online SCH RES	\$189	\$198	\$9	\$135	\$405	\$8,910
04.2-UG Online SCH NON-RES	\$189	\$198	\$9	\$135	\$405	\$8,910
04.3-UG Online SCH WUE	\$189	\$198	\$9	\$135	\$405	\$8,910
Graduate Tuition Rate per SCH	Res: 4.99% Non-Res: 4.99%					
05-GR Resident SCH (incl. EXRES)	\$473	\$497	\$24	\$288	\$864	\$17,028
06-GR Non Resident SCH	\$565	\$593	\$28	\$336	\$1,008	\$20,340
07.0-GR AP MBA Online SCH	\$430	\$430	\$0	\$0	\$0	\$15,480
07.1-GR Online SCH RES	\$473	\$497	\$24	\$288	\$864	\$17,028
07.2-GR Online SCH NON-RES	\$473	\$497	\$24	\$288	\$864	\$17,028
07.3-GR AP MS.Ed Online SCH	\$369	\$369	\$0	\$0	\$0	\$13,284
08-GR - MEDU SCH	\$406	\$426	\$20	\$240	\$720	\$14,616

Mandatory Enrollment Fees

- **Established by ORS 352.102**
 - oregonlaws.org/ors/352.102
- **Health Center Fee**
 - Recommended by the Director, Student Health and Wellness Center to the President
 - Recommended by the President to the Governing Board
 - Adopted by the Governing Board – included in HECC review/approval
- **Building Fee**
 - Recommended by Administration to the President
 - Recommended by the President to the Governing Board
 - Adopted by the Governing Board – included in HECC review/approval
- **Proposed fee schedule below was approved by TAC on 5/05/2020**

Mandatory Enrollment Fees	Current	Per AY	Proposed	Per AY	\$ ▲ Per Term	\$ ▲ per AY	% ▲
Student Health Services	\$143.00	\$429.00	\$150.00	\$450.00	\$7.00	\$21.00	4.90%
Building Fee	\$60.00	\$180.00	\$60.00	\$180.00	\$0.00	\$0.00	0.00%
Composite Enrollment Fees:	\$203.00	\$609.00	\$210.00	\$630.00	\$7.00	\$21.00	3.45%

Mandatory Incidental Fees

- **Established by ORS 352.105**
 - oregonlaws.org/ors/352.105
- **Student Incidental Fee (including Green Tag)**
 - Recommended by ASSOU to the President
 - Recommended by the President to the Governing Board
 - Adopted by the Governing Board – not included in HECC review/ approval
- **Student Recreation Center Fee**
 - Recommended by ASSOU to the President
 - Recommended by the President to the Governing Board
 - Adopted by the Governing Board (HECC review/approval not required)

Proposed fee schedule below was approved by ASSOU on 4/10/2020

Mandatory Incidental Fees (Student Fee Process)	Current	Per AY	Proposed	Per AY	\$ ▲ Per Term	\$ ▲ per AY	% ▲
Student Incidental	\$347.00	\$1,041.00	\$372.00	\$1,116.00	\$25.00	\$75.00	7.20%
Green Tag Fee	\$13.00	\$39.00	\$13.00	\$39.00	\$0.00	\$0.00	0.00%
Student Rec Center	\$95.00	\$285.00	\$104.00	\$312.00	\$0.00	\$0.00	9.47%
Composite Incidental Fees:	\$455.00	\$1,365.00	\$489.00	\$1,467.00	\$25.00	\$75.00	7.47%

*****TAC DOES NOT VOTE ON THESE RATES*****

TAC Proposal for AY 2020-21 Tuition and Fees

Tuition Category*	Current Credit Rate Per Term	Current Tuition per Academic Year	Proposed Credit Rate Per Term	Proposed per Academic Year	Increase \$ per Credit	Increase \$ per Academic Year	Increased %
Resident Undergrad	\$189.00	\$8,505.00	\$198.00	\$8,910.00	\$9.00	\$405.00	4.76%
WUE	\$284.00	\$12,780.00	\$297.00	\$13,365.00	\$13.00	\$585.00	4.58%
Nonres Undergrad	\$552.00	\$24,840.00	\$580.00	\$26,100.00	\$28.00	\$1,260.00	5.07%
Resident Grad	\$473.00	\$17,028.00	\$497.00	\$17,892.00	\$24.00	\$864.00	5.07%
Nonres Grad	\$565.00	\$20,340.00	\$593.00	\$21,348.00	\$28.00	\$1,008.00	4.96%
Masters - Education	\$406.00	\$14,616.00	\$426.00	\$15,336.00	\$20.00	\$720.00	4.93%

*Tuition rates rounded to nearest whole dollar

Mandatory Enrollment Fees							
Student Health Services	\$143.00	\$429.00	\$150.00	\$450.00	\$7.00	\$21.00	4.90%
Building Fee	\$60.00	\$180.00	\$60.00	\$180.00	\$0.00	\$0.00	0.00%
Composite Enrollment Fees:	\$203.00	\$609.00	\$210.00	\$630.00	\$7.00	\$21.00	3.45%

ORS 352.102: Change to Tuition and Mandatory Enrollment Fees

Resident Undergrad	<u>\$9,114.00</u>	<u>\$9,540.00</u>	<u>\$426.00</u>	<u>4.67%</u>
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Mandatory Incidental Fees - Student Fee Process (For context of totals calculation below)							
Student Incidental	\$347.00	\$1,041.00	\$372.00	\$1,116.00	\$25.00	\$75.00	7.20%
Green Tag Fee	\$13.00	\$39.00	\$13.00	\$39.00	\$0.00	\$0.00	0.00%
Student Rec Center	\$95.00	\$285.00	\$104.00	\$312.00	\$0.00	\$0.00	9.47%
Composite Incidental Fees:	\$455.00	\$1,365.00	\$489.00	\$1,467.00	\$25.00	\$75.00	7.47%

Tuition & Fees Totals							
Resident Undergrad	\$3,496.00	\$10,479.00	\$3,669.00	\$11,007.00	\$41.00	\$501.00	5.04%
WUE	\$4,783.00	\$14,754.00	\$5,154.00	\$15,462.00	\$45.00	\$681.00	4.80%
Nonres Undergrad	\$8,942.50	\$26,814.00	\$9,399.00	\$28,197.00	\$60.00	\$1,356.00	5.16%
Resident Grad	\$6,334.00	\$19,002.00	\$8,154.00	\$19,989.00	\$56.00	\$960.00	5.19%
Nonres Grad	\$7,436.80	\$22,314.00	\$9,594.00	\$23,445.00	\$60.00	\$1,104.00	5.07%
Masters - Education	\$5,528.80	\$16,590.00	\$7,089.00	\$17,433.00	\$52.00	\$816.00	5.08%

President's Recommendation

Comparison: Oregon Public Universities

Institution	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21 Proposed	AY % Increase
Eastern	140.50	146.00	153.95	159.00	167.00	175.00	4.79%
Southern	147.00	151.41	165.04	172.00	189.00	196.00	3.70%
Oregon Tech	162.75	167.63	176.01	183.93	194.97	204.70	4.99%
Western	156.00	155.33	165.33	172.00	176.00	184.00	4.55%
Oregon State	283.00	287.00	295.00	303.00	316.00	326.11	3.20%
OSU-Cascades	274.00	280.00	288.00	296.00	305.00	319.40	4.72%
Portland State	150.00	156.00	164.50	172.23	179.00	TBD	TBD
University of Oregon	189.00	198.00	211.00	217.00	232.00	238.96	3.00%

*Note: Some OPU rates presented here subject to change pending their respective board approvals

Scenario	Tuition Rate increase	Change in Fund Bal. (\$M)	Percent Ops Revenue	Change in Fund Bal. (\$M)	Percent Ops Revenue
		@ - 3.8%	Enrollment* (modelled)	@ - 4.8%	Enrollment (shows 1% change)
Retro	-10%	-9.74	-8.7%		
1	0%	-6.69	-3.31%	-7.00	-3.83%
2	0.99%	-6.38	-2.79%	-6.69	-3.31%
3	1.99%	-6.07	-2.26%	-6.38	-2.79%
4	2.99%	-5.75	-1.75%	-6.07	-2.26%
5	3.99%	-5.43	-1.22%	-5.75	-1.75%
6	4.99%	-5.27	-0.96%	-5.43	-1.22%

- Includes projected State revenue losses (\$3.1M + \$1.2M)
- Assumes Furlough savings through 12/31 (\$1.7M in E&G)
- Includes extension of hiring freeze through Summer term (\$300k)
- Includes 20% of CARES allocation (\$1.88M) to E&G (= \$375k)

Recommended Tuition Rates Effective Fall 2020



	2019-20	2020-21				
	Current	Proposed	FY21			
Undergraduate Tuition Rate per SCH	Res: 10.0% Non-Res: 5.0%	Res: 3.70% Non-Res: 4.99%	Difference Per SCH	Difference Per Term @ 15 SCH	Difference Per AY @ 45 SCH	Annual Tuition Cost
01-WUE SCH	\$284	\$294	\$10	\$150	\$450	\$13,230
02-UG Resident SCH (incl. EXRES)	\$189	\$196	\$7	\$105	\$315	\$8,820
02.2-UG JackJo Pledge	\$121	\$125	\$4	\$60	\$180	\$5,625
03-UG Non Resident SCH	\$552	\$580	\$28	\$420	\$1,260	\$26,100
04.1-UG Online SCH RES	\$189	\$196	\$7	\$105	\$315	\$8,820
04.2-UG Online SCH NON-RES	\$189	\$196	\$7	\$105	\$315	\$8,820
04.3-UG Online SCH WUE	\$189	\$196	\$7	\$105	\$315	\$8,820
Graduate Tuition Rate per SCH		Res: 3.70% Non-Res: 4.99%				
05-GR Resident SCH (incl. EXRES)	\$473	\$491	\$18	\$216	\$648	\$17,028
06-GR Non Resident SCH	\$565	\$593	\$28	\$336	\$1,008	\$20,340
07.0-GR AP MBA Online SCH	\$430	\$430	\$0	\$0	\$0	\$15,480
07.1-GR Online SCH RES	\$473	\$491	\$18	\$216	\$648	\$17,028
07.2-GR Online SCH NON-RES	\$473	\$491	\$18	\$216	\$648	\$17,028
07.3-GR AP MS.Ed Online SCH	\$369	\$369	\$0	\$0	\$0	\$13,284
08-GR - MEDU SCH	\$406	\$421	\$15	\$180	\$540	\$14,616

*Note: New WUE online students to be assessed WUE rate + delivery fee
Current WUE online students will remain with same rate structure until graduation

President's Proposed AY 2020-21 Tuition and Fees



Tuition Category*	Current Credit Rate Per Term	Current Tuition per Academic Year	Proposed Credit Rate Per Term	Proposed per Academic Year	\$ ▲ Per Term	\$ ▲ per AY	% ▲
Resident Undergrad	\$189.00	\$8,505.00	\$196.00	\$8,820.00	\$7.00	\$315.00	3.70%
WUE	\$284.00	\$12,780.00	\$294.00	\$13,230.00	\$10.00	\$450.00	3.52%
Nonres Undergrad	\$552.00	\$24,840.00	\$580.00	\$26,100.00	\$28.00	\$1,260.00	5.07%
Resident Grad	\$473.00	\$17,028.00	\$491.00	\$17,676.00	\$18.00	\$648.00	3.81%
Nonres Grad	\$565.00	\$20,340.00	\$593.00	\$21,348.00	\$28.00	\$1,008.00	4.96%
Masters - Education	\$406.00	\$14,616.00	\$422.00	\$15,192.00	\$16.00	\$576.00	3.94%

*Tuition rates rounded to nearest whole dollar

Mandatory Enrollment Fees	Current	Per AY	Proposed	Per AY	\$ ▲ Per Term	\$ ▲ per AY	% ▲
Student Health Services	\$143.00	\$429.00	\$150.00	\$450.00	\$7.00	\$21.00	4.90%
Building Fee	\$60.00	\$180.00	\$60.00	\$180.00	\$0.00	\$0.00	0.00%
Composite Enrollment Fees:	\$203.00	\$609.00	\$210.00	\$630.00	\$7.00	\$21.00	3.45%

ORS 352.102: Change to Tuition and Mandatory Enrollment Fees

Resident Undergrad	<u>\$9,114.00</u>	<u>\$9,450.00</u>	<u>\$336.00</u>	<u>3.69%</u>
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Mandatory Incidental Fees (Student Fee Process)	Current	Per AY	Proposed	Per AY	\$ ▲ Per Term	\$ ▲ per AY	% ▲
Student Incidental	\$347.00	\$1,041.00	\$372.00	\$1,116.00	\$25.00	\$75.00	7.20%
Green Tag Fee	\$13.00	\$39.00	\$13.00	\$39.00	\$0.00	\$0.00	0.00%
Student Rec Center	\$95.00	\$285.00	\$104.00	\$312.00	\$0.00	\$0.00	9.47%
Composite Incidental Fees:	\$455.00	\$1,365.00	\$489.00	\$1,467.00	\$25.00	\$75.00	7.47%

Tuition & Fees Totals	Current	Per AY	Proposed	Per AY	\$ ▲ Per Term	\$ ▲ per AY	% ▲
Resident Undergrad	\$3,496.00	\$10,479.00	\$3,639.00	\$10,917.00	\$39.00	\$411.00	4.18%
WUE	\$4,783.00	\$14,754.00	\$5,109.00	\$15,327.00	\$42.00	\$546.00	3.88%
Nonres Undergrad	\$8,942.50	\$26,814.00	\$9,399.00	\$28,197.00	\$60.00	\$1,356.00	5.16%
Resident Grad	\$6,334.00	\$19,002.00	\$8,064.00	\$19,773.00	\$50.00	\$744.00	4.06%
Nonres Grad	\$7,436.80	\$22,314.00	\$9,594.00	\$23,445.00	\$60.00	\$1,104.00	5.07%
Masters - Education	\$5,528.80	\$16,590.00	\$7,029.00	\$17,289.00	\$48.00	\$672.00	4.21%



SOUTHERN OREGON UNIVERSITY

ACADEMIC YEAR TUITION RECOMMENDATION

For July 1, 2020 through June 30, 2021

Date: May 14, 2020

To: Southern Oregon University Board of Trustees

From: Dr. Linda Schott, President

SOU's leadership team began working with members of the Tuition Advisory Council (TAC) and the Board of Trustees in January to determine the appropriate level of tuition for AY20-21. The work of the TAC culminated in a recommendation to me for an undergraduate resident tuition increase of 4.99% or less. After further consultation with my leadership team, **I recommend an increase in resident undergraduate (UG) tuition of \$7 per credit hour, to a total of \$196 per credit (an increase of 3.7% to resident UG over AY20-21).** See the table below titled "President's Recommendation" below.

This recommendation acknowledges the unique time in which we are living and working. The negative impacts of the COVID-19 pandemic on the economy of our state and nation will make it harder for students and families to afford a college education, yet unemployment indicators show that those with baccalaureate and masters degrees are less likely to become unemployed. Keeping tuition as low as possible is an investment by our institution in the long-term financial stability of individuals, families, and our region.

Knowing that even this relatively modest tuition increase will be challenging for some students and families, I will also continue providing institutional aid (Raider Aid) to our most economically vulnerable students. And we must continue to support all students with excellent faculty, highly qualified support staff, and an appropriate array of programs to provide for their mental health, physical well-being, intellectual growth and degree attainment.

This commitment to affordability and access will not be easy for our institution. Years of underfunding by the state have led to a persistent structural deficit of about \$3 million per year. In addition, the COVID-19 pandemic has greatly reduced auxiliary revenue and is projected to reduce state funding and enrollment for the coming academic year. In order to accommodate these budget reductions while keeping tuition as low as possible, I have

- Furloughed all classified and professional staff between 20% and 40% until December 31, 2020.
- Taken a 25% furlough personally.
- Initiated a hiring freeze for all new positions except for those deemed critical.

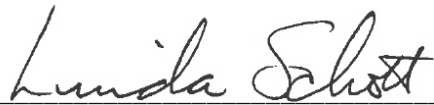
My executive team and I will continue to work with the campus to achieve the additional spending reductions that will be needed to ensure financial stability for our institution while also ensuring that all who seek an education at SOU will be able to pursue it.

DESCRIPTION OF REQUEST

Recommendation for Tuition Rates for Academic Year 2020-21

	2019-20	2020-21				
	Current	Proposed	FY21			
Undergraduate Tuition Rate per SCH	Res: 10.0% Non-Res: 5.0%	Res: 3.70% Non-Res: 4.99%	Difference Per SCH	Difference Per Term @ 15 SCH	Difference Per AY @ 45 SCH	Annual Tuition Cost
01-WUE SCH	\$284	\$294	\$10	\$150	\$450	\$13,230
02-UG Resident SCH (incl. EXRES)	\$189	\$196	\$7	\$105	\$315	\$8,820
02.2-UG JackJo Pledge	\$121	\$125	\$4	\$60	\$180	\$5,625
03-UG Non Resident SCH	\$552	\$580	\$28	\$420	\$1,260	\$26,100
04.1-UG Online SCH RES	\$189	\$196	\$7	\$105	\$315	\$8,820
04.2-UG Online SCH NON-RES	\$189	\$196	\$7	\$105	\$315	\$8,820
04.3-UG Online SCH WUE	\$189	\$196	\$7	\$105	\$315	\$8,820
Graduate Tuition Rate per SCH		Res: 3.70% Non-Res: 4.99%				
05-GR Resident SCH (incl. EXRES)	\$473	\$491	\$18	\$216	\$648	\$17,028
06-GR Non Resident SCH	\$565	\$593	\$28	\$336	\$1,008	\$20,340
07.0-GR AP MBA Online SCH	\$430	\$430	\$0	\$0	\$0	\$15,480
07.1-GR Online SCH RES	\$473	\$491	\$18	\$216	\$648	\$17,028
07.2-GR Online SCH NON-RES	\$473	\$491	\$18	\$216	\$648	\$17,028
07.3-GR AP MS.Ed Online SCH	\$369	\$369	\$0	\$0	\$0	\$13,284
08-GR - MEDU SCH	\$406	\$421	\$15	\$180	\$540	\$14,616

PRESIDENT'S RECOMMENDATION



Dr. Linda Schott
President, Southern Oregon University



SOUTHERN OREGON UNIVERSITY

MANDATORY ENROLLMENT FEES

RECOMMENDATION

For July 1, 2020 through June 30, 2021

Date: May 13, 2020

To: Southern Oregon University Board of Trustees

From: Dr. Linda Schott, President

DESCRIPTION OF REQUEST

Recommendation for Mandatory Enrollment Fees for Academic Year 2020-21

DESCRIPTION OF FUNDS

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

Recommendation and Prior Year Review	Rates	Notes
Building Fee per term - Academic Year 2020-21	\$60	
Building Fee per term - Prior Academic Year 2019-20	\$60	
\$ Change from Prior Year	\$0	
% Change from Prior Year	0%	
Building Fee - Summer Term 2020	\$45	
Building Fee - Prior Summer Term	\$45	
\$ Change from Prior Year	\$0	
% Change from Prior Year	0%	

Student Health Services Fee per term -Academic Year 2020-21*	\$150	*Not applicable to online only students
Student Health Services Fee per term - Prior Academic Year 2019-20	\$143	
\$ Change from Prior Year	\$7	
% Change from Prior Year	4.90%	
Student Health Services Fee - Summer Term 2020*	\$107	* Not applicable to online only students
Student Health Services Fee - Prior Summer Term	\$102	
\$ Change from Prior Year	\$5	
% Change from Prior Year	4.76%	

Dr. Linda Schott
President, Southern Oregon University



SOUTHERN OREGON UNIVERSITY

ASSOU STUDENT INCIDENTAL FEE AND STUDENT RECREATION CENTER FEE

JOINT RECOMMENDATION

For July 1, 2020 through June 30, 2021

Date: May 13, 2020

To: Southern Oregon University Board of Trustees

From: Britney Sharp, President, Associated Students of Southern Oregon University; and Dr. Linda Schott, University President

DESCRIPTION OF REQUEST

Recommendation for Student Incidental Fee 2020-21 and Student Recreation Center Fee 2020-21

DESCRIPTION OF FUNDS

Student Incidental Fee and Incidental Fee Reserve

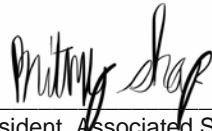
Student Recreation Center Fee and Recreation Center Fee Reserve

Summary/Description	Index	Budget
Initial Budget Level (IBL)	Athletics Advisory Committee (AAC)	\$1,207,562
Initial Budget Level (IBL)	Educational Activities Advisory Committee (EAAC)	\$357,374
Initial Budget Level (IBL)	Stevens Union Advisory Committee (SUAC)	\$1,679,889
Initial Budget Level (IBL)	Student Recreation Center	\$557,241
	Subtotal:	\$3,802,066
Incidental Fee Reserve	IFCRES	\$202,777
Building/Equipment Reserve	Building (SUIOBR,SUMBMR) Equipment (SUADDR,SUBERS,SUGNER,SUMIEQ)	\$12,000
Green Tag Fee	SUGNTF/SUGBEF	\$141,726
SFC Emergency Reserve		\$40,000
	Total Initial Budget Level	4,198,569
	Projected Average Student Academic Year FTE	3,634
	Incidental Fee per Term - Academic Year 2020-21	\$372
	Incidental Fee per Term - Academic Year Prior Year 2019-20	\$360
	\$ Change from Prior Year	\$12
	% Change from Prior Year	3.3%
	Incidental Fee - Summer Term 2020	\$85
	Incidental Fee - Summer Term Prior Year	\$82
	\$ Change from Prior Year	\$3

	% Change from Prior Year	3.65%
	Recreation Center Fee per Term - Academic Year 2020-21	\$104
	Recreation Center Fee - Academic Year Prior Year	\$95
	\$ Change from Prior Year	\$9
	% Change from Prior Year	9.5%

JOINT RECOMMENDATION

☐ [X] Approve ☐ [] Disapprove



President, Associated Students
of Southern Oregon University
Britney Sharp

05/13/2020

Date: _____

☒ [X] Approve ☐ [] Disapprove



President, Southern Oregon University
Dr. Linda Schott

May 13, 2020

Date: _____

Housing Rates Update



Updated Housing & Dining Rates

Housing	Current	Curr/AY	New Rate	New/AY	Inc \$/Term	Inc \$/AY	Inc %
Greensprings - Double	\$2,562	\$7,686	\$2,662	\$7,986	\$100	\$300	3.90%
Greensprings - Double-as-Single	\$3,384	\$10,152	\$3,516	\$10,548	\$132	\$396	3.90%
Madrone - Single Apartment	\$3,953	\$11,859	\$4,107	\$12,322	\$154	\$463	3.90%
Shasta - Double	\$2,893	\$8,679	\$3,006	\$9,017	\$113	\$338	3.90%
Shasta - Single	\$3,523	\$10,569	\$3,660	\$10,981	\$137	\$412	3.90%
McLoughlin - Double	\$3,047	\$9,141	\$3,166	\$9,497	\$119	\$356	3.90%
McLoughlin - Single	\$3,783	\$11,349	\$3,931	\$11,792	\$148	\$443	3.90%
McLoughlin - Super Single	\$4,161	\$12,483	\$4,323	\$12,970	\$162	\$487	3.90%
McLoughlin - Studio Single	\$4,245	\$12,735	\$4,411	\$13,232	\$166	\$497	3.90%

Meals	Current	Curr/AY	New Rate	New/AY	Inc \$/Term	Inc \$/AY	Inc %
Red Plan	\$ 1,865	\$ 5,595	\$ 1,921	\$ 5,763	\$ 55.95	\$ 167.85	3.00%
Black Plan	\$ 1,865	\$ 5,595	\$ 1,921	\$ 5,763	\$ 55.95	\$ 167.85	3.00%
S Plan	\$ 1,535	\$ 4,605	\$ 1,612	\$ 4,835	\$ 76.75	\$ 230.25	5.00%
O Plan	\$ 1,535	\$ 4,605	\$ 1,612	\$ 4,835	\$ 76.75	\$ 230.25	5.00%
U Plan	\$ 1,535	\$ 4,605	\$ 1,612	\$ 4,835	\$ 76.75	\$ 230.25	5.00%
Rocky Plan	\$ 1,250	\$ 3,750	\$ 1,310	\$ 3,930	\$ 60.00	\$ 180.00	4.80%
'COVID' Reduced Services Plan	TBD	TBD					
Hawk Plan	\$ 850	\$ 2,550	\$ 901	\$ 2,703	\$ 51.00	\$ 153.00	6.00%
Madrone Plan	\$ 800	\$ 2,400	\$ 848	\$ 2,544	\$ 48.00	\$ 144.00	6.00%

UG Resident Total Cost of Attendance Academic Year 2020-21



Tuition	Current per Term	Current Per AY	Proposed per Term	Proposed Per AY	\$ ▲ Per Term	\$ ▲ per AY	% ▲
Resident Undergrad	\$2,835	\$8,505	\$2,940	\$8,820	\$7	\$315	3.7%
Mandatory Enrollment & Incidental Fees							
Student Incidental & Green Tag	\$360	\$1,080	\$385	\$1,155	\$25	\$75	6.94%
Student Rec Center	\$95	\$285	\$104	\$312	\$9	\$27	9.47%
Student Health Services	\$143	\$429	\$150	\$450	\$7	\$21	4.90%
Building Fee	\$60	\$180	\$60	\$180	\$0	\$0	0.00%
Composite Fees:	\$658	\$1,974	\$699	\$2,097	\$41	\$123	6.23%
Housing/Meals							
Shasta Double	\$2,893	\$8,679	\$3,006	\$9,017	\$113	\$338	3.90%
Red Plan	\$1,865	\$5,595	\$1,921	\$5,763	\$56	\$168	3.00%
Composite Housing/Meals Change:	\$4,758	\$14,274	\$4,927	\$14,780	\$169	\$506	3.55%
Total Cost of Attendance							
Resident Undergrad	\$8,251	\$24,753	\$8,566	\$25,697	\$217	\$944	3.82%

*All figures rounded to nearest whole dollar

**Southern Oregon University
Board of Trustees
Finance and Administration Committee**

**RESOLUTION
Tuition and Fees for Academic Year 2020-21**

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 2020-21 (AY20-21);

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 the tuition, mandatory fees, incidental fee and the student recreation fee schedules for AY20-21 (as proposed or as amended) to become effective July 1, 2020.

VOTE: _____

DATE: _____

University Board Secretary

Discussion of Financial Metrics

Future Meetings

Adjournment