



OFFICE OF THE BOARD OF TRUSTEES

**Public Meeting Notice**

May 15, 2020

TO: Southern Oregon University Board of Trustees

FROM: Sabrina Prud'homme, University Board Secretary

RE: Notice of Special Meeting of the Board of Trustees  
(Videoconference)

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

Topics of the meeting will include a discussion and action on capital projects expenditure authorizations and on tuition and fees for academic year 2020-2021. There also will be a budget update and review of the pro forma.

The meeting will occur as follows:

Friday, May 22, 2020

12:30 p.m. to 3:30 p.m. (or until business is concluded)

Visit [governance.sou.edu](https://governance.sou.edu) for meeting materials.

To join or view the proceedings, visit <https://sou.zoom.us/j/99752902127> 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](mailto: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. Submissions will be shared with the board during the meeting.



**Board of Trustees**  
**May 22, 2020**

# Call to Order / Roll / Declaration of a Quorum



## **Board of Trustees Special Meeting**

**Friday, May 22, 2020**

**12:30 – 3:30 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.

- |         |          |  |  |
|---------|----------|--|--|
|         | <b>1</b> | <b>Call to Order/Roll/Declaration of a Quorum</b>        |  |
|         | 1.1      | Welcome and opening remarks                              | Chair Lyn Hennion  |
|         | 1.2      | Roll and Declaration of a Quorum                         | Sabrina Prud'homme,<br>SOU, Board Secretary                              |
|         | 1.3      | Agenda Review  | Chair Hennion  |
|         | <b>2</b> | <b>Public Comment</b>                                    |  |
|         | <b>3</b> | <b>Action, Information and Discussion Items</b>          |  |
| 15 min. | 3.1      | Capital Projects Expenditure Authorizations<br>(Action)  | Greg Perkinson, SOU,<br>Vice President for Finance<br>and Administration |
| 30 min. | 3.2      | Budget Update and Review of Pro Forma                    | Greg Perkinson, SOU,<br>Vice President for Finance<br>and Administration |
| 90 min. | 3.3      | Tuition and Fees for Academic Year 2020-2021<br>(Action) | Dr. Linda Schott, SOU,<br>President; Britney Sharp,<br>ASSOU, President  |
|         | <b>4</b> | <b>Adjournment</b>                                       | Chair Hennion  |

# Public Comment

# Capital Projects Expenditure Authorizations (Action)

# Capital Projects Expenditures - Request

## **Britt Hall Project**

	<b>Est. Project Cost</b>
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

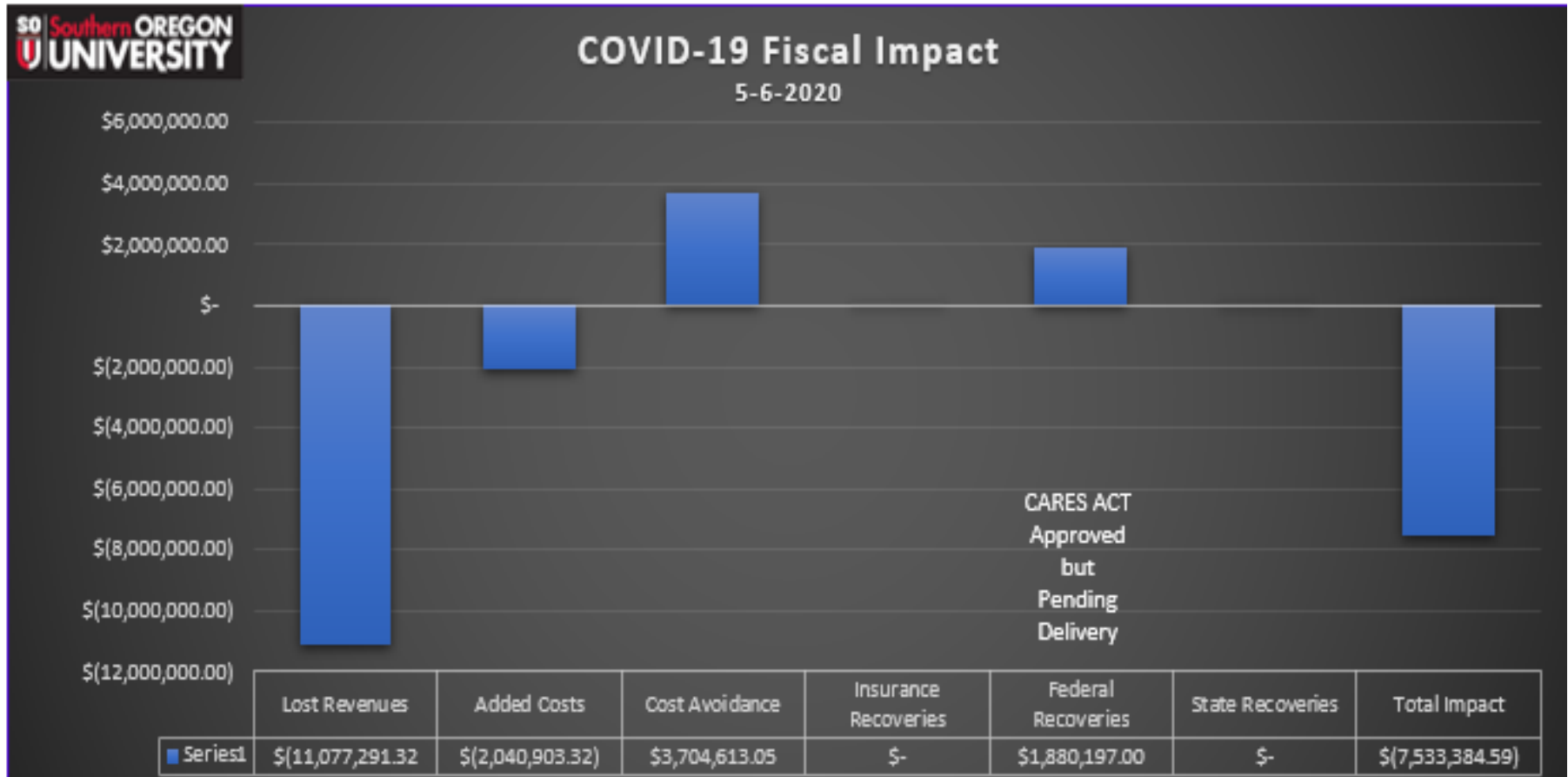
# Budget Update and Review of Pro Forma



# Road Map

- COVID-19 Update
- Pro Forma (as of 5/12/2020)
  - *Board to review dynamic pro forma in the meeting*

# SOU Continues to Evaluate Impacts



# 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)

# 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)

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



**Southern Oregon University**  
Tuition Rate Recommendation

*Package for*  
***Board of Trustees***  
*Academic Year 2020-2021*

## Table of Contents

Executive Summary .....	1
Introduction to Tuition Setting Process and Outcomes.....	3
Tuition Setting Process.....	3
Agendas, minutes and packets from all tuition review committee meetings. ....	4
Any documents or information provided to the tuition review committees .....	4
Tuition Advisory Council Recommendation.....	4
Pro forma budget statements, or documents of a similar nature, presented for all tuition scenarios presented to the institution’s tuition advisory committee.....	8
APPENDICES .....	9
APPENDIX I - HB4141 Compliance Matrix .....	9
APPENDIX II - The impact of that increase on the mission of the university .....	11
APPENDIX III - Information on cost containment efforts .....	13

## Executive Summary

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. COVID-19 then approached and hit our country in February and March, and SOU’s focus – like that of all public universities in Oregon – became planning, preparing, responding and recovering from the pandemic.

Many budget factors have now been considered, with particular attention to the needs of SOU students, the university’s financial stability, expected AY20-21 enrollment and the level of funding provided by the state of Oregon (with a budget rescission looming). Two recurring items – fall enrollment and the level of state funding 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, but the final level of PUSF funding cannot be reliably predicted.

Those unknowns, combined with incredible uncertainty related to COVID-19, have made “price sensitivity” and “affordability” the two most important considerations for setting next year’s tuition. The president’s recommendation, based upon those of the Tuition Advisory Council and members of the SOU Cabinet, is for the Board of Trustees to approve a tuition rate far below what will drive short-term financial sustainability. There is currently a \$10.3 million budget gap to fill, at the level of federal aid provided through the CARES Act and a proposed 8.5 percent state budget rescission.

That context informed the President’s decision to 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). Affordability, access and equity were key considerations. See Table 1 below.

This recommended tuition is purposefully low, yet the President is still focused on the need for a robust “Raider Aid” program. SOU is committed to providing aid that enables our most economically vulnerable students to achieve their degrees. The university is also committed to supporting its 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.

Some of Oregon’s public universities plan to use reserves to defer tuition increases in FY21, but SOU depleted \$3.3 million in reserves last year and cut \$3 million in FY20 to balance its E&G budget. SOU’s total budget deficit of \$10.3 million for FY21 includes revenues lost due to COVID-19, increased costs and a “structural deficit” in the E&G portfolio. The university continues to advocate for increases to “mission differentiation” (stabilizing regional support) in the Student Success and Completion Model.

This document, *The Tuition Rate Recommendation*, summarizes both the process and outcomes, and contains three sections. The first section introduces the process. Afterwards, the TAC’s recommendation is presented. Then, an overview of the pro forma is provided for context. It is important to note that separate artifacts (approval letters) flow from the TAC Chair, to the President; and then from the President to the Board. Those artifacts are available in Board documents from the 5/22/20 Special meeting (<https://governance.sou.edu/meetings/>). A copy of this summary will be provided to the Higher Education Coordinating Commission (HECC) staff, for their situational awareness.



Table 1 – President’s Recommended Tuition and Mandatory Fee Rate Increases

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	\$9,114.00	\$9,450.00	\$336.00	3.69%
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## Introduction to Tuition Setting Process and Outcomes

The following sections present data for the Board, including the tuition-setting process, objectives and the Tuition Advisory Council (TAC) recommendation.

### Tuition Setting Process

SOU engaged in a collaborative tuition setting process with guidance provided by the TAC that included students, staff and faculty members. The TAC was established to provide a written report to the President of the university, setting forth the recommendations, deliberations and observations of the advisory body regarding tuition and mandatory enrollment fees for the upcoming academic year.

SOU’s Tuition Advisory Council met 10 times between January through May 2020. In addition to providing training and information about the budgeting process, the legislative appropriations process, and the relationship between state appropriations and SOU’s tuition and fees, the Council also dedicated considerable time to examining the effects of different funding scenarios on the university’s financial outlook and discussing what variables could be adjusted to reach a recommendation that would keep costs down for students while still allowing the university to maintain financial stability and deliver on its core mission. As the Covid-19 pandemic unfolded, the TAC was provided with routine updates. The

agendas, materials and minutes from each of the Council's meetings can be found on the Tuition Advisory Council's website at <https://sou.edu/president/tuition-advisory-council/>.

Although there were robust and detailed discussions of other possible recommendations, the Tuition Advisory Council made a unanimous recommendation to President Schott; there were no minority opinions.

#### Agendas, minutes and packets from all tuition review committee meetings.

The agendas, materials and minutes from each of the Tuition Advisory Council meetings can be found on the Tuition Advisory Council's website at <https://sou.edu/president/tuition-advisory-council/>.

#### Any documents or information provided to the tuition review committees

The agendas, materials and minutes from each of the Tuition Advisory Council meetings can also be found on the Tuition Advisory Council's website at <https://sou.edu/president/tuition-advisory-council/>.

### **Tuition Advisory Council Recommendation**

The Tuition Advisory Council (TAC) reached a unanimous decision and recommendation, which was presented to the President. This section summarizes the rationale for the TAC's Tuition Rate recommendation. The TAC based 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.

On Wednesday April 29 the TAC voted unanimously to recommend to the President an increase of 4.99% or less for resident undergraduate tuition. The rationale for the TAC's decision was informed by a number of things, including but not limited to the following:

- proforma modeling
- budget planning
- enrollment projections
- employment and occupation projections
- data on economic/personal hardships COVID-19 has placed on students and their families
- lack of clarity regarding state and federal allocations
- allows you flexibility in setting tuition

The group also unanimously approved the following items:

- increase the fee for Student Health and Wellness Center Services \$143/term to \$150/term, which covers the cost associated with Tele-Health, a remote form of delivery for physical and mental health services;
- change the WUE student online tuition rate from the current undergraduate resident tuition rate plus online course fee to WUE rate plus online course fee (applies to new WUE and American Samoa students only, i.e., all current students will continue to pay the old rate);
- increase nonresident undergraduate tuition rate by 4.99%
- increase graduate tuition rate by 4.99% with the exception of online MBA and MEd programs;
- differential tuition charge of \$10 p/sch for Military Sciences courses.

Figure 1 – Decision document, Rates at 4.99%

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

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. 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 2: Mandatory Enrollment Fees

## Mandatory *Enrollment* Fees



- Established by ORS 352.102  
[oregonlaws.org/ors/352.102](https://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%

Figure 3: Mandatory Incidental Fees

## Mandatory *Incidental* Fees



- Established by ORS 352.105  
[oregonlaws.org/ors/352.105](https://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 – not included in HECC review/approval
- 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\*\*\*

Figure 4: AY 2020-21 TAC Recommended 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							
<b>Mandatory Enrollment Fees</b>							
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%
<b>ORS 352.102: Change to Tuition and Mandatory Enrollment Fees</b>							
Resident Undergrad		<b>\$9,114.00</b>		<b>\$9,540.00</b>		<b>\$426.00</b>	<b>4.67%</b>
<b>Mandatory Incidental Fees - Student Fee Process</b> (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%
<b>Tuition &amp; Fees Totals</b>							
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%

## **Pro forma budget statements, or documents of a similar nature, presented for all tuition scenarios presented to the institution's tuition advisory committee**

SOU develops forecasts and projections using an interactive pro forma that promotes transparency and enhances understanding across the broader university community. The tool enables management to present a summarized view of the projected future status of the university, based on current financial inputs across the university's accounting system.

As stated previously, SOU's goal in any tuition scenario modeled is to maintain affordability to all students with a focus on historically underrepresented populations. When considering these goals, cost drivers affecting the institution's financial picture must become completely transparent. To accomplish this level of transparency and communication, SOU has enhanced its interactive pro forma modeling tool to provide real-time interactivity. Multiple factor "sliders" built directly into the tool can be independently manipulated to see their impact over the next biennium. The modelling tool was critical to on-the-fly scenario modeling during the Tuition Advisory Council's deliberations and enables SOU to provide users an instant answer to their tuition questions.

Dozens of models were created during meetings to assist committee members in their understanding of tuition outcomes (the read-ahead material for the May 22, 2020 Board meeting shows the evolution of that analysis). Many of these are presented on the Tuition Advisory Committee's website as part of the materials available for download. Ultimately, the entirety of the pro forma model used to make the final tuition recommendation to President Schott was made available to the TAC for their own use through a secure shared online location.

## APPENDICES

### APPENDIX I - HB4141 Compliance Matrix

The Office of Internal Audit review the SOU process and documentation and found our processes in compliance.

Here is a copy of the HB 4141 checklist



## House Bill 4141 Compliance measures

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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.

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

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

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

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

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

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



## **APPENDIX II - The impact of that increase on the mission of the university**

This tuition increase is focused on maintaining price sensitivity, and affordability. It also provides some financial sustainability in support of SOU's vision and mission. For context, in January 2018, Southern Oregon University went before the HECC to discuss its new mission: "Southern Oregon University is a regionally-engaged learning community committed to being the educational provider of choice for learners throughout their lives." This mission accompanied a new vision that indicated that "Southern Oregon University will become an inclusive, sustainable university for the future that guides all learners to develop the knowledge, capacities, and audacity to innovate boldly and create lives of purpose." SOU also discussed with the HECC how it planned to achieve this vision and fulfill the new mission through seven strategic directions aligned with HECC's strategic goals.

The HECC unanimously approved SOU's new mission statement, and its members described our strategic planning work as "exemplary" and "energizing." (<https://sou.edu/president/sou-mission-statement-strategic-plan-praised-oregons-hecc/>)

Since receiving approval from the HECC, SOU has made significant progress on initiatives in support of the new mission. Some examples are:

- SOU took the lead in forming the Southern Oregon Higher Education Collaborative that brings Rogue and Klamath Community Colleges and Oregon Tech together with SOU in service to the learners and employers of southern Oregon.
- SOU initiated a "University-Community Collaborations" project that is encouraging collaborations among the major employers in Ashland: the Ashland School District, the Asante Ashland Community Hospital, the City of Ashland, the Chamber of Commerce, and the Oregon Shakespeare Festival.
- To better serve adult learners, SOU has developed several completely online, adult-focused degree programs: a Masters of Business Administration, a baccalaureate-completion program in Innovation and Leadership, and a Masters of Education (launching in September 2019)
- SOU has developed training in "service excellence" and is supporting all employees in their efforts to provide excellent customer service.
- SOU has provided extensive professional development opportunities to faculty members as they envision how to transform their pedagogical approaches and SOU's curricula.
- SOU has grown its successful "pipeline programs," particularly those serving Native American and Latinx youth. The Latinx programs have increased the high school graduation rate among their participants to 90% (compared to 72% for nonparticipants statewide) and its college enrollment rate to 78% (compared to 39% for nonparticipants statewide.)

Overall, the campus community has embraced the new mission and vision. Perhaps the best testament to campus support has been the level of volunteer engagement by faculty and staff members. In 2017,

President Schott invited interested staff and faculty in to participate in one or another of seven Professional Learning Community (PLC) groups. Each group was given a research question, or set of questions, to study for one quarter. Their findings helped provide information on trends, changes and other likely developments affecting the future of higher education. This work proved to be so successful, the president decided to replicate the process in January 2019, but with seven additional questions for seven new Professional Learning Communities made up of SOU faculty and staff members. Each time, the groups presented their work at a well-attended Campus Expo. (More information on this work can be found here: <https://sou.edu/strategic-planning/research/>)

The members of the SOU community have been willing to volunteer for these research projects because they are committed to the success of our students and to ensuring the sustainability of our campus. Without adequate revenue—either from state appropriations or tuition—this work will slow and eventually stop altogether. Instead of working to become “Oregon’s University for the Future”, the campus will begin to focus on how to downsize its programs and lay-off employees. The challenges before every higher education institution are great, and we need every employee engaged and enthusiastic about their work in order to confront those challenges successfully.

Inadequate revenue may also force SOU to reduce its service to students and the region. To cope with decreased funding, SOU would need to reduce the institutional aid it provides to supplement federal and state financial aid. It may also need to reduce the support it provides to programs that enhance the student experience and success. Such programs include: the “Degree in Three”, which allows students to achieve a baccalaureate degree in three years; our Bridge Program which provides additional supports for students who may struggle to succeed at SOU; and our K-12 pipeline programs for Latinx and Native American students.

### **APPENDIX III - Information on cost containment efforts**

SOU is a lean and efficient university. By using our innovative Faculty Loading System, we ensure efficient analysis and scheduling of faculty and determining faculty release time. Since 2014, SOU steadily reduced faculty (driving almost a 20% reduction). As a result of creating efficiencies and driving retrenchment efforts created \$16.5M in one-time and recurring savings. In FY 19, other mitigations occurred. In FY 20, the team worked to reduce costs by over \$3M (roughly equivalent to a 5% budget rescission). See examples below:

#### **Fall20 Context and Details**

- Fall Enrollment (SCH) declines necessitated immediate budget reductions
- Target at beginning of Fall was \$2.4M
- Target at beginning of Winter added \$600k
- COVID-19 conditions creating havoc with finances start of Spring
- Exceptional losses in housing, dining and other fee funded areas
- Sports Lottery reduction > \$300k for Q4 (FY20) ... and Q5 distribution also suspended (another \$300k) ... and possibly rest of calendar year!
- Projected end-of-term SCH down 11% [\$550k+]
- Students refunded portion of fee
- Cost escalation due to crisis situation
- Remote delivery preparation
- Technology enhancements
- Cleaning

#### **FY20 Budget Cuts and Impacts**

- What we did in FY20 -- Budget Cuts announced in Fall 2019
  - \$1.4M in Salary & OPE
  - 24 positions kept vacant or savings captured (delays, freezes, etc.)
    - 16 Classified
    - 6 Unclassified
    - \$218k in Term-by-term faculty
  - \$942k S&S Reductions
- And most recently -- Additional Cuts Spring 2020
  - Salary freeze for all unclassified admin employees: \$180k
  - Hiring freeze for all searches: \$300k
  - Travel and other S&S reductions due to lockdowns: \$400k
  - Reduced Internal Sales Charges: \$47k
  - Utility Savings: \$120k

## FY20 Budget Cuts and Impacts

- In E&G, if fund balance is to remain above 8% operating revenue, more cost reductions are needed
  - .2 FTE furlough reduction (20%) for Unclassified and Classified
    - 199 Admin | 165 Classified
  - Federal UI \$600 weekly payment
  - Nearly all employees will make MORE on UI until 8/1/2020
    - Benefits remain intact – health & life unaffected
  - Expiration of Non-renewable contracts
  - President to take even deeper 25% cut
  - FY21 Budget Forecast and Planning
- PUSF reduction of 8.5% for biennium
  - Full rescission to be applied in FY21
    - -\$3.1M, roughly 13% cut from FY21 state appropriation
  - Using standard modeling, % Operating revenue falls to **-2.49%**
  - Essentially same state funding level as FY2016
- Additional 'exceptional' actions if required...may have to develop plans to dramatically scale back expenses to preserve jobs
  - Hold 32 Classified positions vacant
  - Hold 34 Unclassified positions vacant
  - Hold 6 Faculty positions vacant
  - Additional year of salary freeze for admin
  - Expiration of Non-renewable contracts
  - Continued 20-40% redux through 12/31
  - Travel restrictions through Jan 1, 2021
  - Extended winter break closure

Legacy cost savings, and institutional effectiveness are still critically important, even small program savings. Some recent examples of current fiscal year initiatives include:

- Physical Plan improvements (Optimize Steam Utilization; Improved Long Term Gas Price Hedges; Replace chillers; energy savings per year; Utilities management - \$245K / year
- Faculty Loading enhancements; Initiated previously, but producing ongoing annual savings
- Service Center enhancements (moved Accountants to Business Services to improve communication and professional development)
- Services and Supplies cuts; all VPs budgets reduced
- Professional development restrictions; Facilities – Dues and Memberships
- Campus Master Plan – leverage local consultant to upgrade, saving \$200k
- IT enhancements – eliminated redundancy of software; studied failure rate for PC and laptops; negotiated savings rental contract - \$200K
- Studying life expectancy of data-center computing (servers). Have extended the useful life by one additional year.

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

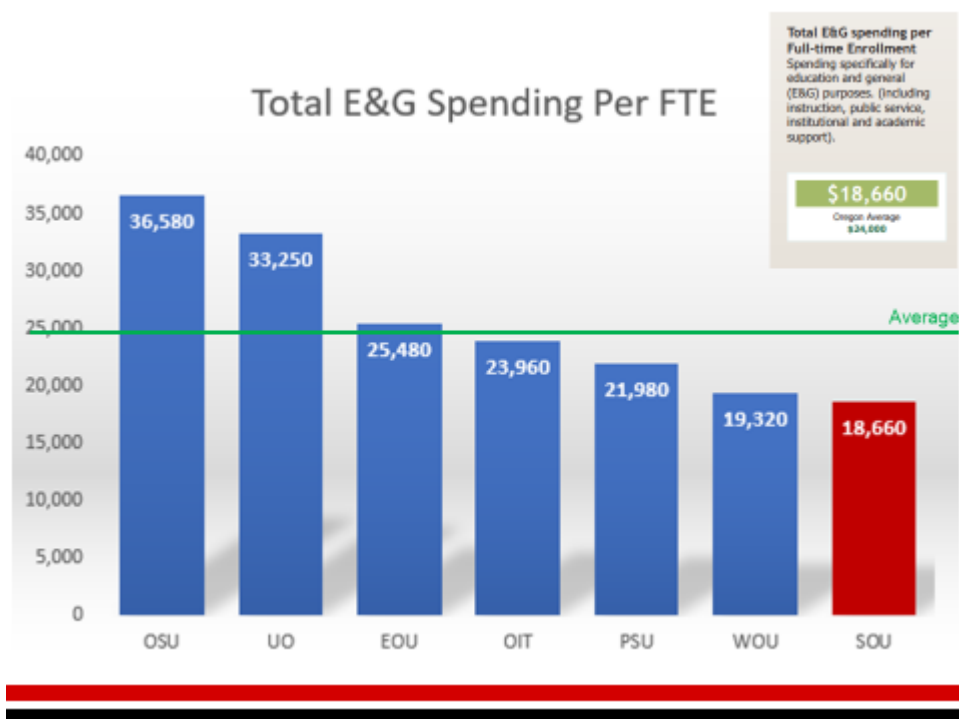
- Implemented phase 1 of Comprehensive review of Business Services
- Streamline internal communication in shared services, develop alternative to event announcing, etc. - \$15K
- Managed onboarding; Expedite onboarding for faster integration
- Payroll processing initiatives
- IEA process (ongoing)

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

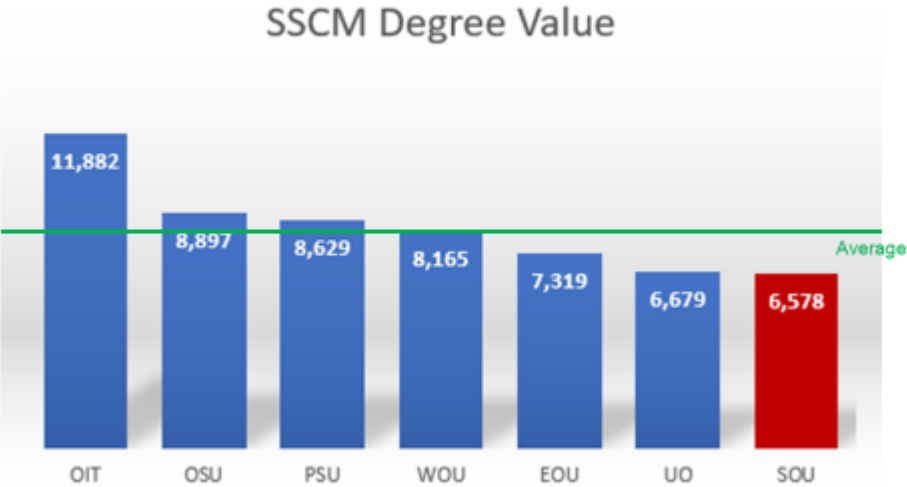
Minimum austerity strategies moving forward:

- Additional supplies and services reductions
- holding vacant positions open and not filling term by term faculty positions (based on work load management process)

The chart below shows SOU is very “lean”

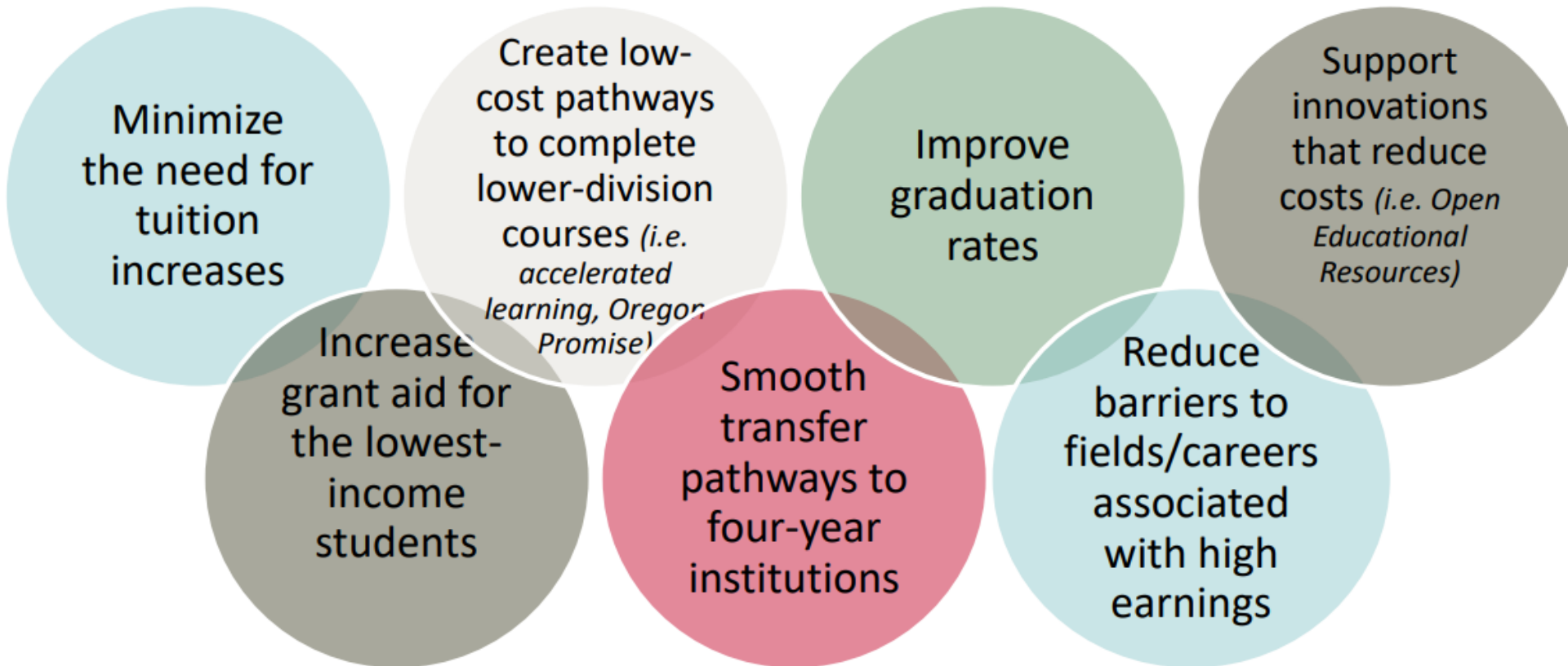


And is a great value...



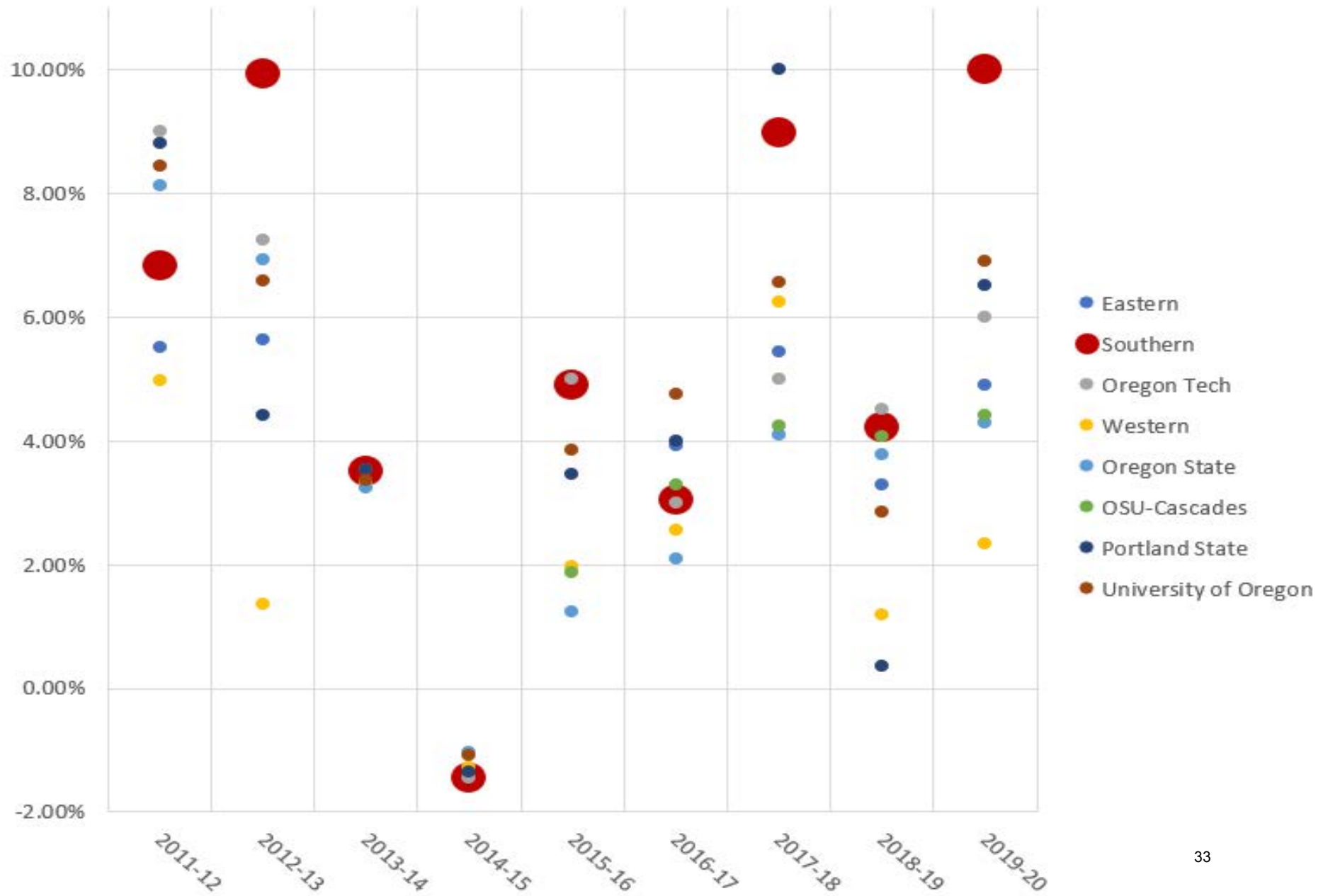
# Tuition Advisory Council Recommendation

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





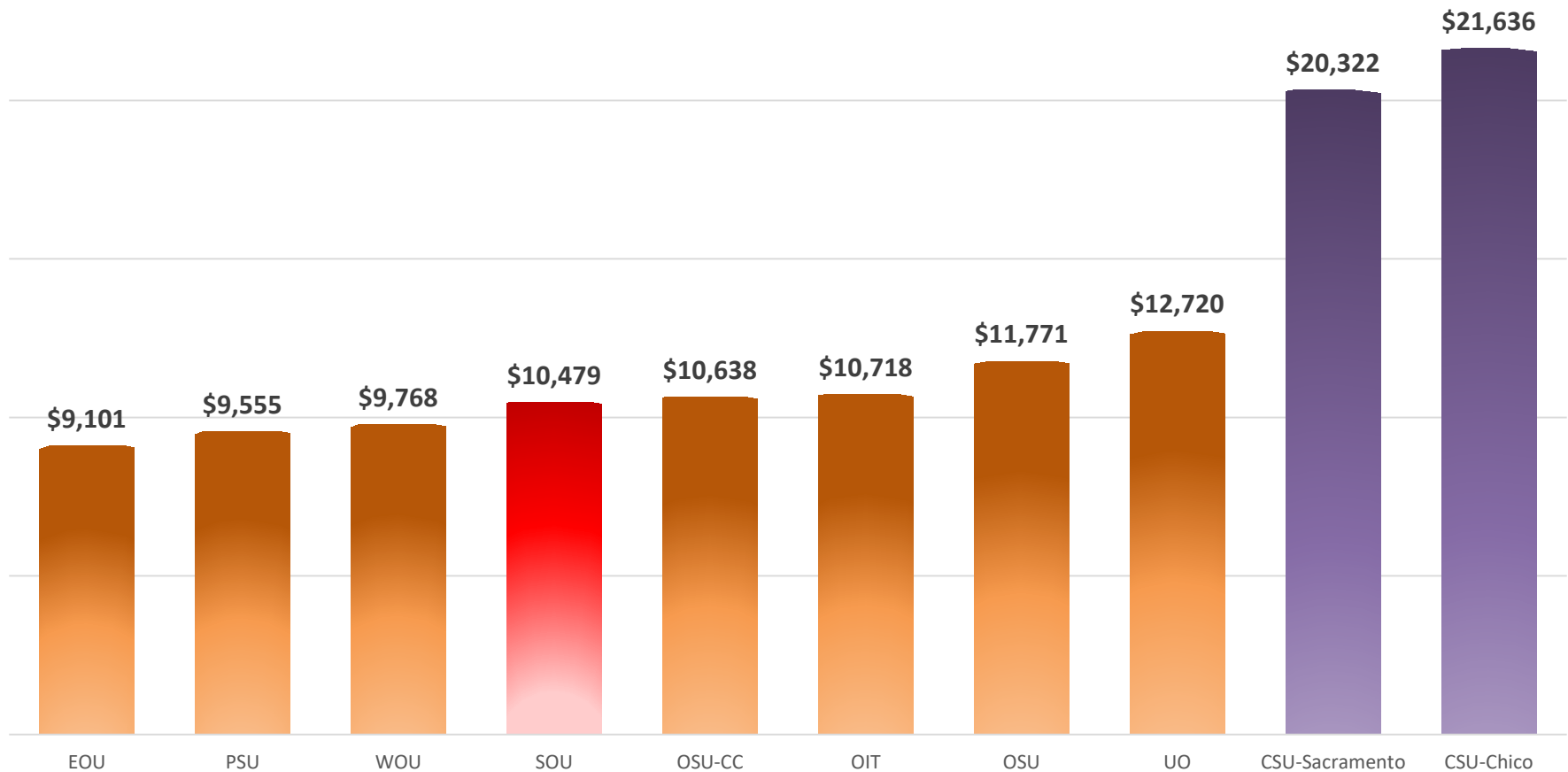
# Relative % Change from Prior Academic Year



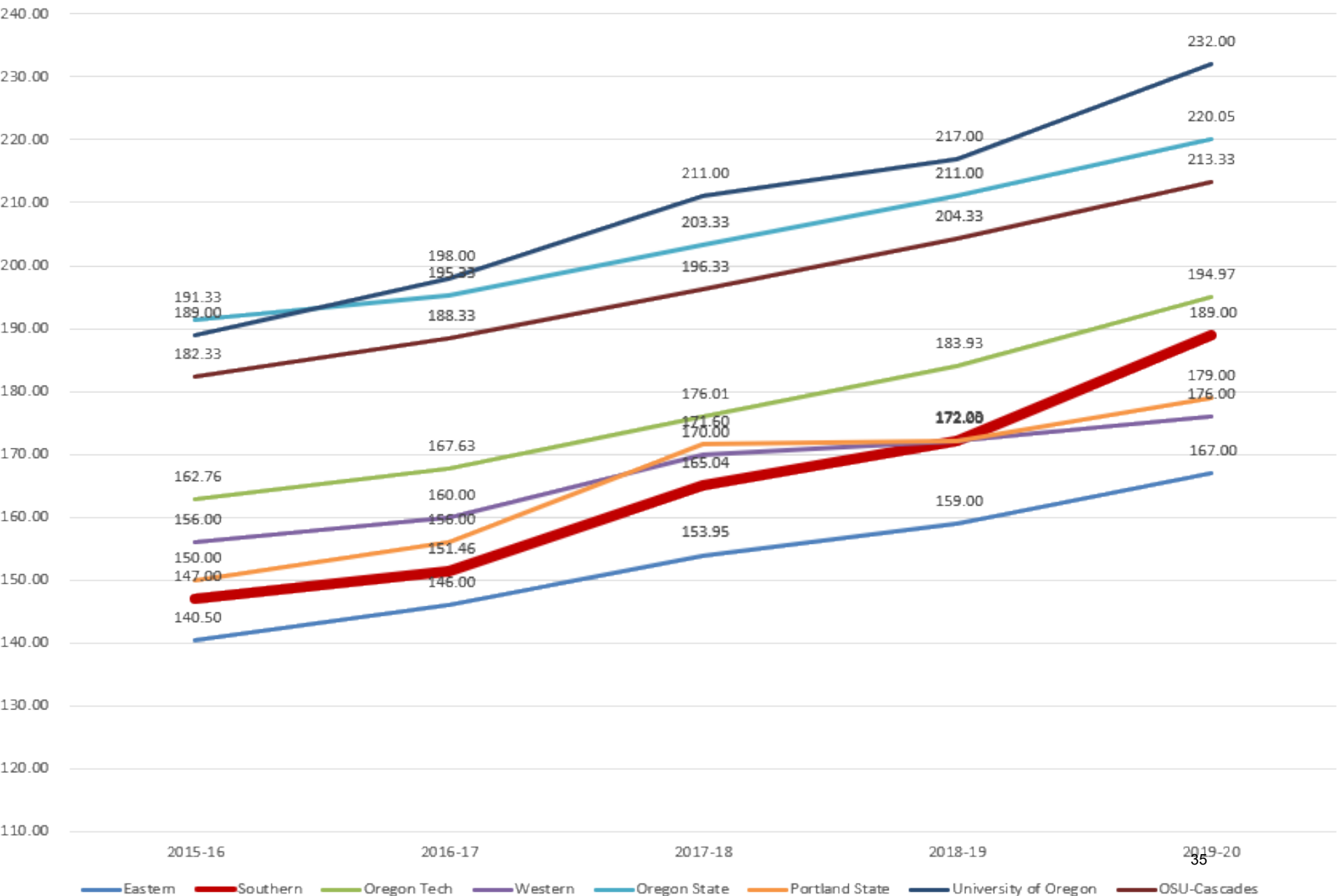
# OPUs and CSU Competitors

## Academic Year Tuition and Mandatory Fees

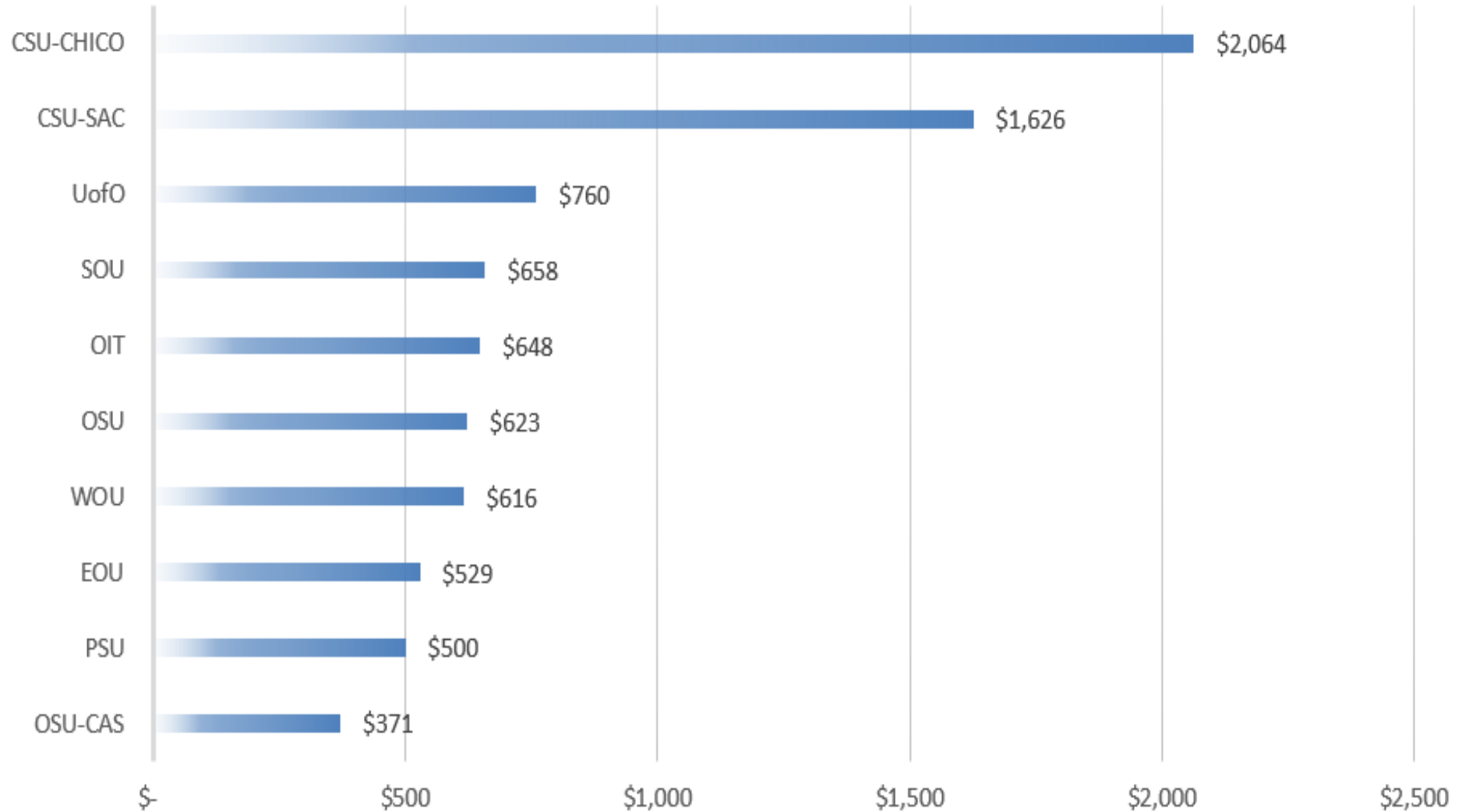
For full-time undergraduates 2019-20 Academic Year



# Oregon Resident UG Tuition 2015 - 2020



# Mandatory Fees per term for Academic Year 2019-20



# 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
- Finance and Administration Committee made recommendation to Board of Trustees 5/21/20.

# 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](http://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](http://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

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)
<b>Retro</b>	-10%	-9.74	-8.7%		
<b>1</b>	0%	-6.69	-3.31%	-7.00	-3.83%
<b>2</b>	0.99%	-6.38	-2.79%	-6.69	-3.31%
<b>3</b>	1.99%	-6.07	-2.26%	-6.38	-2.79%
<b>4</b>	2.99%	-5.75	-1.75%	-6.07	-2.26%
<b>5</b>	3.99%	-5.43	-1.22%	-5.75	-1.75%
<b>6</b>	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)

# 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%
<b>Southern</b>	<b>147.00</b>	<b>151.41</b>	<b>165.04</b>	<b>172.00</b>	<b>189.00</b>	<b>196.00</b>	<b>3.70%</b>
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%

\*Notes:

Schedule based on single credit hour rates

Rates subject to change pending universities' respective board approvals

# 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



## 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.

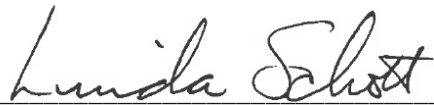
My executive team and I will continue to work with the campus to achieve the additional spending reductions that will be needed to ensure financial stability for our institution while also ensuring that all who seek an education at SOU will be able to pursue it.

## 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
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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
<b>Graduate Tuition Rate per SCH</b>		<b>Res: 3.70% Non-Res: 4.99%</b>				
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

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

<b>Student Health Services Fee</b> per term -Academic Year 2020-21*	<b>\$150</b>	*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%	
<b>Student Health Services Fee</b> - Summer Term 2020*	<b>\$107</b>	* 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%	

A handwritten signature in cursive script that reads 'Linda Schott'.

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

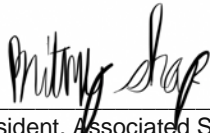
Student Recreation Center Fee and Recreation Center Fee Reserve

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:	<b>\$3,802,066</b>
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	<b>4,198,569</b>
	Projected Average Student Academic Year FTE	3,634
	Incidental Fee per Term - Academic Year 2020-21	<b>\$372</b>
	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	<b>\$85</b>
	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	<b>\$104</b>
	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: \_\_\_\_\_

# 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%

# 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



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

\*All figures rounded to nearest whole dollar

**Southern Oregon University  
Board of Trustees**

**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 Board of Trustees of Southern Oregon University hereby approves the tuition, mandatory fees, incidental fee, and student recreation center fee schedules (as proposed or as amended), to become effective July 1, 2020. With this approval, the board authorizes the collection of the approved tuition and fees for the 2020-2021 academic year.

VOTE: \_\_\_\_\_

DATE: \_\_\_\_\_

\_\_\_\_\_  
University Board Secretary



# Adjournment