



OFFICE OF THE BOARD OF TRUSTEES

**Public Meeting Notice**

April 10, 2025

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

FROM: Sabrina Prud'homme, University Board Secretary

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

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

Action items for the meeting include a consent agenda consisting of the financial dashboard and a periodic management report; the mandatory student incidental fee for Academic Year (AY) 2025-26; and tuition and the mandatory student enrollment fee for AY 2025-26. The committee will also act on an authorization request for the Raider Stadium Renovation Project.

Reports on the agenda include a vice president's report consisting of updates on the Fiscal Year (FY) 2024 year-end and external audits; state funding for the 2025-2027 biennium; and SOU property sales. There will also be a report on the Core Information System Replacement Project.

Other information and discussion items on the agenda will include an update on the single fee, cost of attendance, fiscal year 2025 budget and a review of the financial pro forma.

The meeting will occur as follows:

Thursday, April 17, 2025

5:00 p.m. to 7:00 p.m. (or until business concludes)

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

SOU Ashland Campus, Hannon Library, Meese Room  
1290 Ashland Street, Ashland, OR, 97520

To view the proceedings, visit <https://sou.zoom.us/j/88621110353> at the time of the meeting.

**If ADA accommodations for persons with disabilities are required, please contact Holly Frazier at (541) 552-8055 or email [trustees@sou.edu](mailto:trustees@sou.edu).**

**Accommodation requests should be made at least 48 hours in advance.**

**Public Comment**

Members of the public who wish to provide live public comments in person or remotely during the meeting are invited to sign up to speak or to submit their comments in writing at least 24 hours in advance of the meeting to the Board of Trustees email address: [trustees@sou.edu](mailto:trustees@sou.edu). Public comments also may be delivered by hand or mailed to SOU Board of Trustees, 1250 Siskiyou Boulevard, Churchill Hall, Room 107, Ashland, OR 97520.



**Board of Trustees**  
**Finance and Administration Committee**  
**April 17, 2025**

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# **Call to Order / Roll / Declaration of a Quorum**



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

**Thursday, April 17, 2025  
5 p.m. – 7 p.m. (or until business concludes)  
Meese Room, Hannon Library, SOU Campus  
Zoom: <https://sou.zoom.us/j/88621110353>**

**AGENDA**

Persons wishing to provide live public comments in the meeting or in writing may sign up at [trustees@sou.edu](mailto:trustees@sou.edu).  
Please note: times are approximate and items may be taken out of order.

- |           |          |                                                                          |                                                                                               |
|-----------|----------|--------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| 5:00 p.m. | <b>1</b> | <b>Call to Order/Roll/Declaration of a Quorum</b>                        |                                                                                               |
|           | 1.1      | Welcome and Opening Remarks                                              | Chair Liz Shelby                                                                              |
|           | 1.2      | Roll and Declaration of a Quorum                                         | Sabrina Prud'homme,<br>SOU, Board Secretary                                                   |
|           | 1.3      | Agenda Review                                                            | Chair Liz Shelby                                                                              |
| 5:05      | <b>2</b> | <b>Public Comment</b>                                                    |                                                                                               |
| 5:15      | <b>3</b> | <b>Consent Agenda (Action)</b>                                           | Chair Liz Shelby                                                                              |
|           | 3.1      | Financial Dashboard                                                      |                                                                                               |
|           | 3.2      | Periodic Management Report                                               |                                                                                               |
| 5:20      | <b>4</b> | <b>Vice President's Report</b>                                           |                                                                                               |
|           | 4.1      | Fiscal Year 2024 Year-End and External Audit                             | Dr. Carson Howell, Vice<br>President for Finance and<br>Administration                        |
|           | 4.2      | State Funding for the 2025-2027 Biennium                                 |                                                                                               |
|           | 4.3      | Update on SOU Property Sales                                             |                                                                                               |
| 5:30      | <b>5</b> | <b>Action, Information and Discussion Items</b>                          |                                                                                               |
|           | 5.1      | Fiscal Year 2025 Budget Update and Review of<br>Pro Forma                | Dr. Carson Howell; Josh<br>Lovern, SOU, Director of<br>Budget and Planning                    |
| 5:45      | 5.2      | Mandatory Student Incidental Fee for Academic Year<br>2025-2026 (Action) | Tiana Gilliland, ASSOU,<br>President; Ku-Huan<br>Chien, ASSOU, Student<br>Fee Committee Chair |

**Southern Oregon University  
Board of Trustees  
Finance and Administration Committee Meeting  
Thursday, April 17, 2025**

**AGENDA (Continued)**

6:00	5.3	Tuition and Mandatory Student Enrollment Fee for Academic Year 2025-2026 (Action)	President Rick Bailey; Dr. Casey Shillam, SOU, Provost and Executive Vice President for Academic and Student Affairs; Josh Lovern
	5.3.1	Update on the Single Fee	Josh Lovern
	5.3.2	Cost of Attendance	Josh Lovern
6:30	5.4	Raider Stadium Renovation Project Authorization (Action)	President Rick Bailey; Matt Sayre, SOU, Director of Athletics
6:45	5.5	Core Information System Replacement (CISR) Project Update	Hart Wilson, SOU, CISR Project Manager
6:55	5.6	Future Meetings	Chair Liz Shelby
7:00 p.m.	<b>6</b>	<b>Adjournment</b>	Chair Liz Shelby

# Public Comment

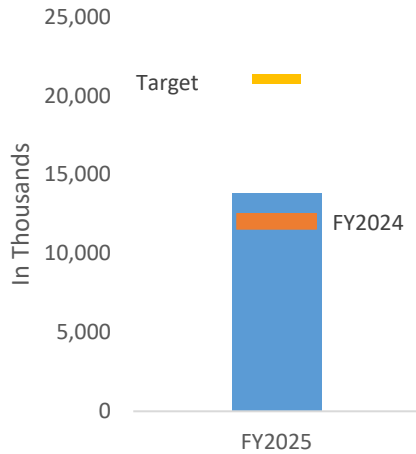
# Consent Agenda (Action)

# Financial Dashboard

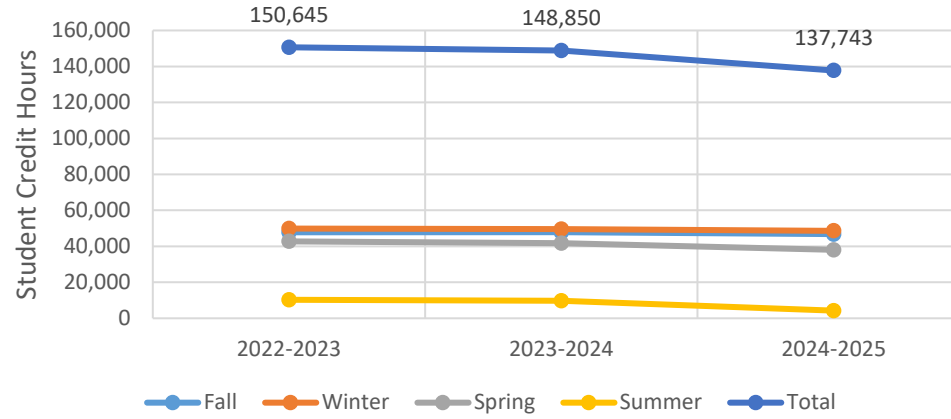
For FY2025

As of March 31, 2024

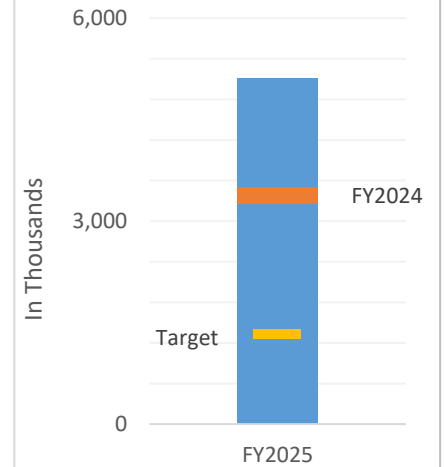
## Operating Cash



## Total Student Credit Hours by Term of the Fiscal Year



## E&G Fund Balance



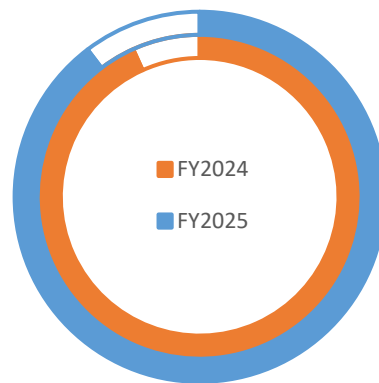
### STUDENT CREDIT HOURS

*Student Credit Hours by Term* has replaced *Student Credit Hours by Week* since weekly reports are no longer provided by Institutional Research

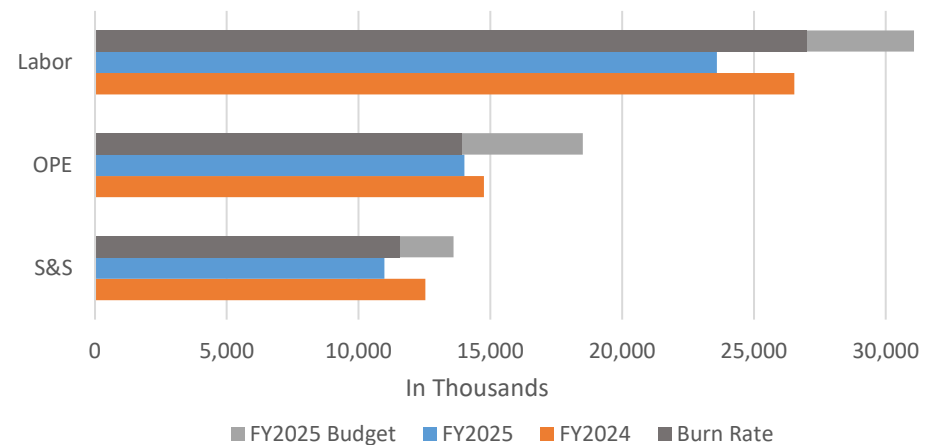
### E&G YTD Revenues

Tuition and Fees are based on student credit hours. Actuals may vary as the feed to Workday was not complete as of the day of this report.

## E&G YTD Revenues



## E&G YTD Select Expenses



# Periodic Management Report



As of March 31, 2025  
Fiscal Year Ending June 30, 2025

	Year-to-Date			Budget
(in thousands)	FY2024 Results	Prior YTD Actual	Current YTD Actual	% Change compared to last year
<b>Education &amp; General</b>				
State General Fund	\$ 28,978	\$ 28,862	\$ 24,064	-17%
Tuition & Resource Fees, net of Remissions	32,842	31,757	33,281	5%
Other	2,488	2,654	2,214	-17%
<b>Total Revenues</b>	<u>\$ 64,308</u>	<u>\$ 63,274</u>	<u>\$ 59,558</u>	
Personnel Services	\$ 52,574	\$ 41,278	\$ 37,615	-9%
Supplies & Services & Capital Outlay	13,829	11,664	11,331	-3%
<b>Total Expenditures</b>	<u>\$ 66,403</u>	<u>\$ 52,942</u>	<u>\$ 48,946</u>	-8%
<b>Net from Operations</b>	<u>\$ (2,095)</u>	<u>\$ 10,332</u>	<u>\$ 10,612</u>	3%
Net Transfers In (Out)	350	(2,189)	(589)	
<b>Total Expenses &amp; Transfers</b>	<u>1,745</u>	<u>(8,143)</u>	<u>(10,023)</u>	23%

# Vice President's Report

# **FY 2025 Budget Update and Review of Pro Forma**

# FY 2025 Budget Update

- FY2024 Actuals updated; changes more impactful than previously thought and ripple throughout future periods
- Tuition down *less* than expected and very close to budgeted target
- Some 'red flags' still persist, but more items coming into focus as Workday fixes are implemented and data integrity achieved

# E&G Revenues

	2023-25 Biennium			2025-27 Biennium	
	2023-24 Actual (000's)	2024-25 FY25 Budget (000's)	2024-25 Est FY25 (000's)	2025-26 FORECAST (000's)	2026-27 FORECAST (000's)
<b>REVENUES</b>					
<b>Total State Funding (SSCM,ETSF,SELP)</b>	27,856	28,706	28,706	29,481	30,529
Tuition	33,204	34,845	34,779	35,386	36,305
Fees	4,479	4,247	4,576	4,276	4,406
Raider Aid (remissions)	(4,853)	(4,000)	(4,500)	(4,062)	(4,168)
<i>Oth tuition &amp; fee adjustments</i>		(1,100)			
<b>Tuition, net of Raider Aid</b>	32,830	33,992	34,855	35,599	36,543
Misc. Other Revenue	4,044	3,742	3,742	3,800	3,899
<b>TOTAL REVENUES</b>	<b>64,730</b>	<b>66,439</b>	<b>67,302</b>	<b>68,880</b>	<b>70,971</b>

## APRIL UPDATE TO REVENUE PROJECTIONS & OBSERVATIONS

- FY25 Tuition increased slightly from March estimate (+\$292k)
  - Late term adjustments, final SCH for ASC
- FY25 Estimates based solely on Banner data – feed to Workday 95+% ready
- Tuition in next biennium up from March estimate – monitoring SCH

### 2025-27 Biennium Assumptions

- Estimated SSCM funding for next biennium set to **GRB** for projections
  - Official SSCM estimate increased State Funding ~\$189k
- Assumes -3% enrollment decline for FY2026
- Assumes TAC Tuition Increase is adopted

# E&G Revenues Variance Analysis

## REVENUES

### Total State Funding (SSCM,ETSF,SELP)

Tuition

Fees

Raider Aid (remissions)

*Oth tuition & fee adjustments*

### Tuition, net of Raider Aid

Misc. Other Revenue

### TOTAL REVENUES

2023-25 Biennium

**2024-25  
FY25 Budget  
(000's)**

**2024-25  
Est FY25  
(000's)**

**2024-25  
VARIANCE  
(000's)**

28,706

28,706

0

34,845

34,779

(66)

4,247

4,576

329

(4,000)

(4,500)

(500)

(1,100)

1,100

33,992

34,855

863

3,742

3,742

-

**66,439**

**67,302**

**863**

## APRIL BUDGET vs PROJECTION VARIANCE ANALYSIS - REVENUES

FY2025 Budget vs Estimate to Complete\*

- Tuition (-\$66k) and Fees (+\$329k)
  - Fee growth offset by Single Fee shift
- VERY concerned about remissions – currently invisible to budget reporting
- Total Revenue Variance: \$863k

\*NOTE: FY2025 Revenue data feed process is not yet finalized

# E&G Labor

	2023-25 Biennium			2025-27 Biennium	
	2023-24 Actual (000's)	2024-25 FY25 Budget (000's)	2024-25 Est FY25 (000's)	2025-26 FORECAST (000's)	2026-27 FORECAST (000's)
<u>Personnel Services</u>					
Faculty	(14,370)	(14,678)	(13,953)	(14,917)	(15,375)
Unclassified Staff	(9,908)	(9,896)	(9,859)	(9,780)	(10,002)
Classified Staff	(7,036)	(7,426)	(7,401)	(7,779)	(8,119)
Students, GA's, etc	(1,334)	(1,499)	(1,411)	(1,589)	(1,603)
<b>Salaries Sub-total</b>	(32,648)	(33,499)	(32,624)	(34,066)	(35,099)
PERS & ORP (Retirement Pgms)	(8,015)	(7,534)	(8,018)	(7,746)	(8,083)
PEBB (Healthcare)	(8,112)	(7,793)	(8,115)	(8,391)	(8,676)
Other (FICA, SAIF, OPL, etc.)	(3,187)	(3,184)	(3,188)	(3,274)	(3,416)
<b>OPE Sub-total</b>	(19,313)	(18,511)	(19,321)	(19,411)	(20,175)
<b>Net Personnel Services</b>	(51,962)	(52,010)	(51,945)	(53,854)	(56,116)

## APRIL UPDATE TO LABOR PROJECTIONS & OBSERVATIONS

- Mostly unchanged from March
  - Slight increases in Faculty, Classified, Student and OPEs
- OPE issues persist; Workday Support contract 'Ask an Expert' for review

# E&G Labor Variance Analysis

2023-25 Biennium		
2024-25 FY25 Budget (000's)	2024-25 Est FY25 (000's)	2024-25 VARIANCE (000's)
<u>Personnel Services</u>		
Faculty	(14,678)	725
Unclassified Staff	(9,896)	36
Classified Staff	(7,426)	26
Students, GA's, etc	(1,499)	88
<b>Salaries Sub-total</b>	<b>(33,499)</b>	<b>874</b>
PERS & ORP (Retirement Pgms)	(7,534)	(484)
PEBB (Healthcare)	(7,793)	(322)
Other (FICA, SAIF, OPL, etc.)	(3,184)	(4)
<b>OPE Sub-total</b>	<b>(18,511)</b>	<b>(810)</b>
<b>Net Personnel Services</b>	<b>(52,010)</b>	<b>65</b>

## APRIL BUDGET vs PROJECTION VARIANCE ANALYSIS - LABOR

### FY2025 Budget vs Estimate to Complete

- Salaries - \$874k under budget; mostly Faculty deferral issue being monitored
- OPE - \$810 over budget; Retirement & Health need new modeling
- Net LABOR - \$65k under budget

Supplies & Services		2023-25 Biennium			2025-27 Biennium	
		2023-24 Actual (000's)	2024-25 FY25 Budget (000's)	2024-25 Est FY25 (000's)	2025-26 FORECAST (000's)	2026-27 FORECAST (000's)
S&S Expenses		(14,120)	(12,231)	(12,699)	(12,527)	(12,840)
RisePoint Program Share (AP)		(1,383)	(1,249)	(1,196)	(1,302)	(1,347)
Capital Expenses (CapEx)		(49)	(125)	(90)	(92)	(94)
<b>Total S&amp;S, CapEx, AP</b>		(15,552)	(13,605)	(13,985)	(13,921)	(14,281)

## APRIL SUPPLIES & SERVICES (S&S) PROJECTIONS & OBSERVATIONS

- S&S Full fiscal year projections are currently ‘hotter’ than budgeted
  - Intentionally more conservative than modeling suggests
  - ‘Trust but verify’ – transaction backlog may shock the system later in the fiscal year if too many invoices or P-Cards have been delayed
    - Example: Travel reimbursements
  - Detailed examination of budget vs actuals current underway for FY26
- AP (now called “Risepoint”) Online MBA and MS.Ed almost as anticipated

# Supplies & Services Variance Analysis

S&S Expenses
RisePoint Program Share (AP)
Capital Expenses (CapEx)
<b>Total S&amp;S, CapEx, AP</b>

2023-25 Biennium		
2024-25 FY25 Budget (000's)	2024-25 Est FY25 (000's)	2024-25 VARIANCE (000's)
(12,231)	(12,699)	(468)
(1,249)	(1,196)	53
(125)	(90)	35
(13,605)	(13,985)	(380)

## APRIL VARIANCE ANALYSIS – S&S

### FY2025 Budget vs Estimate to Complete

- General Supplies & Services – \$468k over budget
  - Intentionally conservative compared to model
- AP Program – \$53k under budget
  - Program shrinkage in models
- Capital Expenses - \$35k under budget
- Net impact, \$380k over budget

Transfers	2023-25 Biennium			2025-27 Biennium	
	2023-24 Actual (000's)	2024-25 FY25 Budget (000's)	2024-25 Est FY25 (000's)	2025-26 FORECAST (000's)	2026-27 FORECAST (000's)
Budgeted Transfers (In & Out)	(2,529)	(2,706)	(2,706)	(2,806)	(2,923)
<i>Transfers Adjustments</i>					
<b>Transfers Net</b> (excluding relief funds)	(2,529)	(2,706)	(2,706)	(2,806)	(2,923)
<b>Federal Relief Funds Transferred to E&amp;G</b>	2,879				
<b>Transfers Net</b> (In & Out of E&G)	350	(2,706)	(2,706)	(2,806)	(2,923)

## APRIL TRANSFERS PROJECTIONS & OBSERVATIONS

- FY25
  - Automatic processes still being established in Workday
  - Estimate set to Budget until more fidelity can be achieved
- FY26
  - Estimate based on labor & OPE increase assumptions in E&G transfer supported areas; principally Athletics

## APRIL VARIANCE ANALYSIS – TRANSFERS

FY2025 Budget vs Estimate to Complete

- No observable deviations from budget currently

E&G Fund Balance	2023-25 Biennium			2025-27 Biennium	
	2023-24 Actual (000's)	2024-25 FY25 Budget (000's)	2024-25 Est FY25 (000's)	2025-26 FORECAST (000's)	2026-27 FORECAST (000's)
TOTAL EXPENSES & TRANSFERS	(67,164)	(68,321)	(68,636)	(70,577)	(72,567)
TOTAL EXPENSES (excluding Federal Relief)	(69,693)				
FUND BALANCE					
Non-Recurring 1-Time Revenue	1,122	1,458	1,458	334	
Non-Recurring 1-Time Expense			(1,500)		
Adjusted Ending Fund Balance	4,336	3,912	2,960	1,598	2
% Operating Revenues (Adjusted)	6.70%	5.89%	4.40%	2.32%	0.00%
Change in Fund Balance	(2,433)	(1,881)	(1,333)	(1,696)	(1,596)
Beginning Fund Balance	5,647	3,214	3,214	1,880	184
Ending Fund Balance	3,214	1,332	1,880	184	(1,412)
% Operating Revenues (Regular Ops)	4.96%	2.01%	2.79%	0.27%	-1.99%
Days of Operations	16.75	19.09	10.00	0.95	(7.10)
Months of Operations	0.56	0.64	0.33	0.03	(0.24)

## APRIL UPDATE FUND BALANCE PROJECTIONS & OBSERVATIONS

- FY25 fund balance DECREASED from March estimate.
  - Largely due to Remissions 'cushion'
- Future biennium prospects turning positive
  - Mostly due to revenue increases in SSCM and Tuition
- Continued monitoring to ensure  $R \geq C$

E&G Fund Balance Variance Analysis	2023-25 Biennium		
	2024-25 FY25 Budget (000's)	2024-25 Est FY25 (000's)	2024-25 VARIANCE (000's)
<b>TOTAL EXPENSES &amp; TRANSFERS</b>	<b>(68,321)</b>	<b>(68,636)</b>	<b>(315)</b>
<b>TOTAL EXPENSES</b> (excluding Federal Relief)			
<b>FUND BALANCE</b>			
Non-Recurring 1-Time Revenue	1,458	1,458	-
Non-Recurring 1-Time Expense		(1,500)	(1,500)
Adjusted Ending Fund Balance	3,912	2,960	(952)
<b>% Operating Revenues (Adjusted)</b>	<b>5.89%</b>	<b>4.40%</b>	<b>-1.49%</b>
Change in Fund Balance	<b>(1,881)</b>	<b>(1,333)</b>	<b>548</b>
Beginning Fund Balance	3,214	3,214	0
Ending Fund Balance	1,332	1,880	548
<b>% Operating Revenues (Regular Ops)</b>	<b>2.01%</b>	<b>2.79%</b>	<b>0.79%</b>
<b>Days of Operations</b>	19.09	10.00	(9.09)
<b>Months of Operations</b>	0.64	0.33	(0.30)

## APRIL VARIANCE ANALYSIS – FUND BALANCE

### FY2025 Budget vs Estimate to Complete

- Total Expenses & Transfers \$315k over budget – largely due to OPE estimate
- Change in Fund Balance pressure stemming from Remissions/Labor
- Currently, estimates still better than budgeted, but more work remains

# E&G Pro Forma Projections to FY2027

Education and General (in thousands of dollars)	2023-25 Biennium				2025-27 Biennium	
	2023-24 Actual (000's)	2024-25 FY25 Budget (000's)	2024-25 Est FY25 (000's)	2024-25 VARIANCE (000's)	2025-26 FORECAST (000's)	2026-27 FORECAST (000's)
<b>REVENUES</b>						
<b>Total State Funding (SSCM,ETSF,SELP)</b>	27,856	28,706	28,706	0	29,481	30,529
Tuition	33,204	34,845	34,779	(66)	35,386	36,305
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<i>Oth tuition &amp; fee adjustments</i>		(1,100)		1,100		
<b>Tuition, net of Raider Aid</b>	32,830	33,992	34,855	863	35,599	36,543
Misc. Other Revenue	4,044	3,742	3,742	-	3,800	3,899
<b>TOTAL REVENUES</b>	<b>64,730</b>	<b>66,439</b>	<b>67,302</b>	<b>863</b>	<b>68,880</b>	<b>70,971</b>
<b>EXPENSES &amp; TRANSFERS</b>						
<u>Personnel Services</u>						
<b>Salaries Sub-total</b>	(32,648)	(33,499)	(32,624)	874	(34,066)	(35,099)
<b>OPE Sub-total</b>	(19,313)	(18,511)	(19,321)	(810)	(19,411)	(20,175)
<b>Net Personnel Services</b>	(51,962)	(52,010)	(51,945)	65	(53,854)	(56,116)
<u>Supplies &amp; Services (S&amp;S)</u>						
<b>Total S&amp;S, CapEx, AP</b>	(15,552)	(13,605)	(13,985)	(380)	(13,921)	(14,281)
<i>Personnel and S&amp;S before Transfers</i>	(67,514)	(65,615)	(65,930)	(315)	(67,775)	(69,647)
Net from Operations Before Transfers	(2,783)	825	1,373	548	1,106	1,324
<b>Transfers Net (excluding relief funds)</b>	(2,529)	(2,706)	(2,706)	-	(2,802)	(2,920)
<b>Federal Relief Funds Transferred to E&amp;G</b>	2,879					
<b>Transfers Net (In &amp; Out of E&amp;G)</b>	350	(2,706)	(2,706)	-	(2,802)	(2,920)
<b>TOTAL EXPENSES &amp; TRANSFERS</b>	<b>(67,164)</b>	<b>(68,321)</b>	<b>(68,636)</b>	<b>(315)</b>	<b>(70,577)</b>	<b>(72,567)</b>
<b>TOTAL EXPENSES (excluding Federal Relief)</b>	<b>(69,693)</b>					
<b>FUND BALANCE</b>						
Non-Recurring 1-Time Revenue	1,122	1,458	1,458	-	334	
Non-Recurring 1-Time Expense			(1,500)	(1,500)		
Adjusted Ending Fund Balance	4,336	3,912	2,960	(952)	1,598	2
<b>% Operating Revenues (Adjusted)</b>	<b>6.70%</b>	<b>5.89%</b>	<b>4.40%</b>	<b>-1.49%</b>	<b>2.32%</b>	<b>0.00%</b>
Change in Fund Balance	(2,433)	(1,881)	(1,333)	548	(1,696)	(1,596)
Beginning Fund Balance	5,647	3,214	3,214	0	1,880	184
Ending Fund Balance	3,214	1,332	1,880	548	184	(1,412)
<b>% Operating Revenues (Regular Ops)</b>	<b>4.96%</b>	<b>2.01%</b>	<b>2.79%</b>	<b>0.79%</b>	<b>0.27%</b>	<b>-1.99%</b>
<b>Days of Operations</b>	16.75	19.09	10.00	(9.09)	0.95	(7.10)
<b>Months of Operations</b>	0.56	0.64	0.33	(0.30)	0.03	(0.24)

# **Mandatory Student Incidental Fee for Academic Year 2025-2026 (Action)**

# Mandatory Student Incidental Fees

Statute: ORS 352.105



Per ORS 352.105, public universities in Oregon listed in ORS 352.002 have to collect mandatory incidental fees at the request of their recognized student government by following a process established by that government. The student government is obligated to:

1. Collaborate in good faith with the university's governing board and president before finalizing the mandatory incidental fee collection process.
2. Apprise the board and president of the process and any subsequent changes.

The process may include a student body referendum. Once collected, these fees must be allocated by the recognized student government.

# Components and Procedures of the Mandatory Incidental Student Fees

1. Incidental Student Fee
2. Green Tag Fee
3. Student Recreation Center Fee
  - Shall be recommended by ASSOU to the university president
  - Shall be recommended by the president to the governing board
  - Shall be adopted by the governing board (not subject to HECC review or approval)

**Note:** By Student Referendum, the Student Recreation Center Fee may only be adjusted once every three years.

# Proposed fee Schedule as Approved by ASSOU on April 8, 2025

Mandatory Incidental Fees (Student Fee Process)	Current	Per AY	Proposed	Per AY	\$ ▲ Per Term	\$ ▲ per AY	% ▲
Student Incidental	\$430.00	\$1,290.00	<b>\$456.00</b>	<b>\$1,368.00</b>	<b>\$26.00</b>	<b>\$78.00</b>	<b>6.05%</b>
Green Tag	\$14.00	\$42.00	<b>\$14.00</b>	<b>\$42.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>0.00%</b>
Student Rec Center	\$118.00	\$354.00	<b>\$118.00</b>	<b>\$354.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>0.00%</b>
Composite <b><u>Incidental</u></b> Fees:	\$562.00	\$1,686.00	<b>\$588.00</b>	<b>\$1,764.00</b>	<b>\$26.00</b>	<b>\$78.00</b>	<b>4.63%</b>



MANDATORY STUDENT INCIDENTAL FEES – JOINT RECOMMENDATION

For July 1, 2025 through June 30, 2026 & Summer Term 2025

Date: April 8<sup>th</sup>, 2025  
To: The Board of Trustees of Southern Oregon University  
From: Associated Students of Southern Oregon University (ASSOU)

DESCRIPTION OF FUNDS

Mandatory Incidentals Fees as authorized and collected according to ORS 352.105. Fees include:

**STUDENT INCIDENTAL FEE - Per Student Credit Hour (SCH)**

Incidental Fee Per Term for Academic Year 2025 - 26	\$57
Incidental Fee Per Term for Prior AY 2024 - 25	\$54
\$ Change Per Term from Prior Year:	\$3
% Change from Prior Year:	6.05%
Fee Cap (8 SCH) for Single Fee Assessment:	\$456.00
Incidental Fee - Summer Term 2025	\$12
Incidental Fee - Prior Summer Term	\$11
\$ Change from Prior Year:	\$1
% Change from Prior Year:	6.05%
Fee Cap (8 SCH) for Single Fee Assessment:	\$93.32

**Programs Supported**

Athletics (Incidental Fee Supported Programs), Campus Recreation (Incidental Fee Supported Programs), Student Life & Educational Activities, Indirect Budget Authority Support (e.g. OCA Art Gallery), Building/Equipment Reserves & General Liability Easements, Incidental Fee Reserve

	<b><u>Est. AY Collections</u></b>
Student Incidental Fee	\$3,542,835

**GREEN TAG FEE - Per Student Credit Hour (SCH)**

Green Tag Fee Per Term for Academic Year 2025 - 26	\$1.75
Green Tag Fee Per Term for Prior AY 2024 - 25	\$1.75
\$ Change Per Term from Prior Year:	\$0
% Change from Prior Year:	0.00%
Fee Cap (8 SCH) for Single Fee Assessment:	\$14.00

**Programs Supported**

	<b><u>Est. AY Collections</u></b>
Green Tag Projects	\$108,771

**RECREATION CENTER FEE - Per Student Credit Hour (SCH)**


Recreation Center Fee Per Term for Academic Year 2025 - 26	\$14.75
Recreation Center Fee Per Term for Prior AY 2024 - 25	\$14.75
\$ Change Per Term from Prior Year:	\$0
% Change from Prior Year:	0.00%
Fee Cap (8 SCH) for Single Fee Assessment:	\$118.00

**Programs Supported**

	<b><u>Est. AY Collections</u></b>
Recreation Center (Building, Debt Service, Core Salaries, etc.)	\$916,786


**JOINT RECOMMENDATION**

☒ Approve    ☐ Disapprove

  
President, Associated Students  
of Southern Oregon University  
Tianna Gilliland

4/10/25  
Date

☒ Approve    ☐ Disapprove

  
President, Southern Oregon University  
Richard J. Bailey, Jr., Ph.D.

4/15/25  
Date

# **Tuition and Mandatory Student Enrollment Fee for Academic Year 2025-2026 (Action)**

# Tuition & Fees Roadmap

- TAC Recommendations Summary
- Process and Board of Trustees Involvement
- Tuition Advisory Council (TAC) Checklist
- Historical Tuition Review with Comparators
- Enrollment Context
- TAC's Tuition Recommendation
- President's Tuition Recommendation
- Mandatory Enrollment Fees Overview
- TAC's Enrollment Fee Recommendations
- President's Tuition Recommendations
- Cost of Attendance & Affordability Analysis

# Recommendations Summary

Tuition Category	Current SCH Rate Per Term	Current Tuition per Academic Year	Proposed SCH Rate Per Term	Proposed Tuition per Academic Year (45 SCH)	Increase \$ per Credit	Increase \$ per Academic Year	Increased %
Resident Undergrad	\$ 226.00	\$ 10,170.00	\$ 238.19	\$ 10,718.55	\$ 12.19	\$ 548.55	5.39%
Mandatory Enrollment Fees	Current Fee Per SCH	Per AY (8 SCH Cap)	Proposed Fee Per SCH	Per AY (24 SCH Cap)	\$ ▲ Per Term	\$ ▲ per AY	% ▲
Student Health Services Fee	\$ 23.38	\$ 561.00	\$ 23.38	\$ 561.00	\$ -	\$ -	0%
Building Debt-Service Fee	\$ 6.50	\$ 156.00	\$ 6.50	\$ 156.00	\$ -	\$ -	0%
Technology Services Fee	\$ 4.09	\$ 98.25	\$ 4.09	\$ 98.25	\$ -	\$ -	0%
HECC - Composite Tuition & Fees	\$ 259.97	\$ 10,985.25	\$ 272.16	\$11,533.80	\$12.19	\$548.55	<b>4.99%</b>

## Threshold Comparisons:

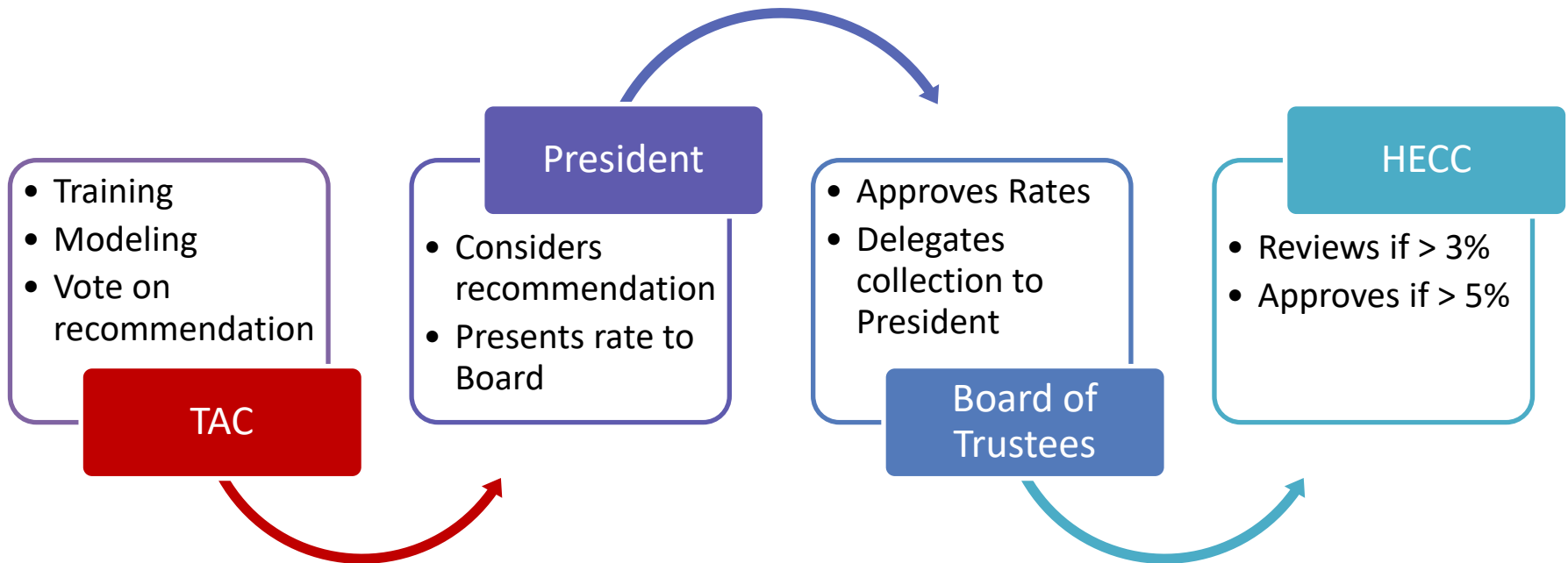
- Composite change at Single Fee Cap (Student taking 24 SCH per Academic Year): **4.69%**
- Composite change at Financial Aid Level (Student taking 36 SCH per Academic Year): **4.90%**

# Tuition Rate Setting Process

## ORS 352.103

- Each public university listed in [ORS 352.002 \(Public universities\)](#) shall have an advisory body to advise the president of the university on the president's recommendations to the governing board regarding resident tuition and mandatory enrollment fees for the upcoming academic year.

# Tuition Process Overview

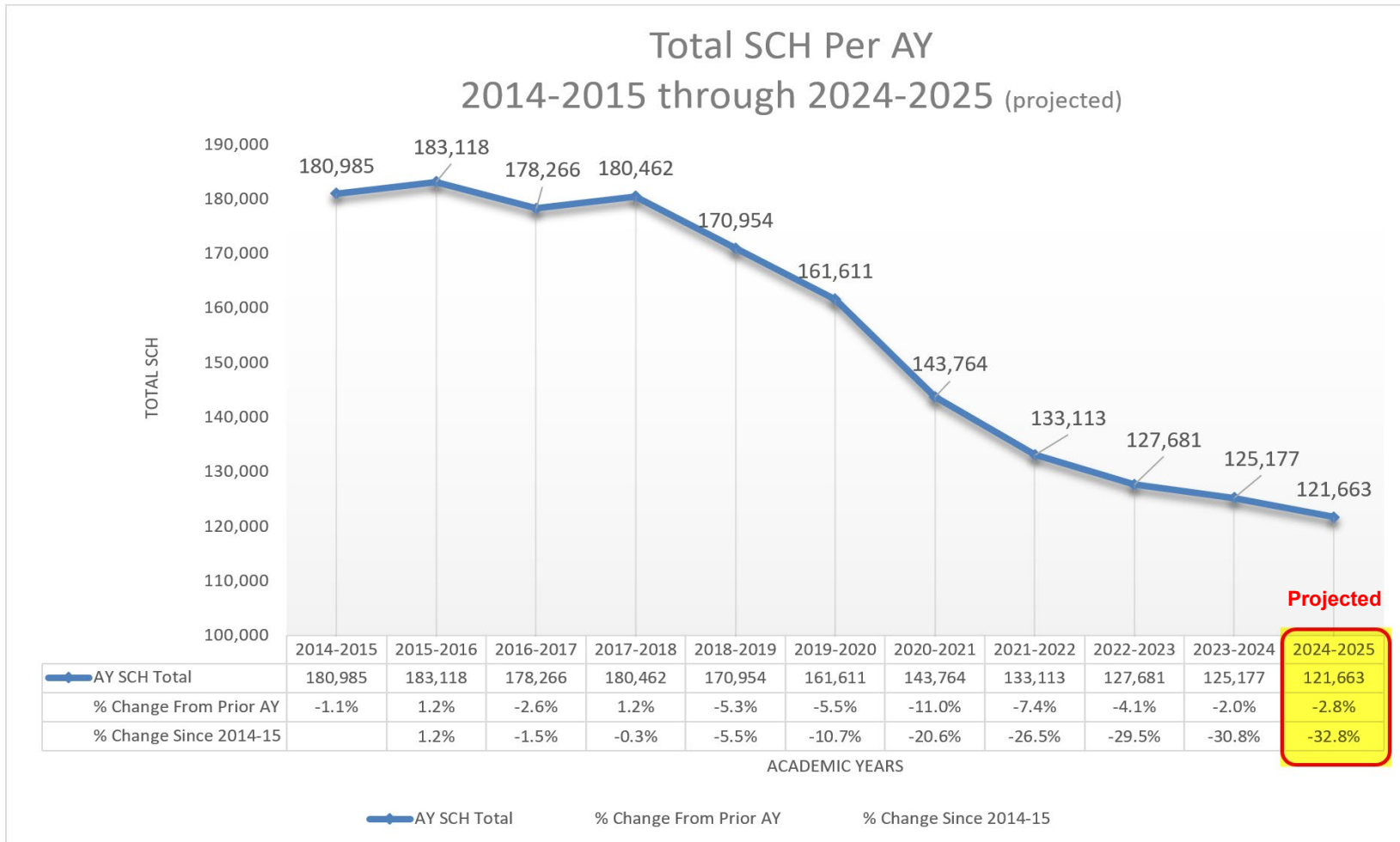


## ORS 352.103 – COMPLIANCE CHECKLIST

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1. The University must create a shared governance body that advises the President concerning resident tuition and fees recommendations to be brought before the University's Board of Trustees;
  - A. **SOU chartered the Tuition Advisory Council.**
2. That body must provide a written document describing the role of the advisory council and be composed of at least:
  - ☒ a) Two Administrators
  - ☒ b) Two Faculty
  - ☒ c) Two Students representing Student Government
  - ☒ d) Two Students representing historically underserved students
3. The University must provide training on:
  - ☒ a) The budget of the university
  - ☒ b) The legislative appropriation processes
  - ☒ c) Data showing the relationship between tuition and fees to state appropriations
4. The University must provide the council with:
  - ☒ a) A plan for managing costs
  - ☒ b) A plan for how tuition and fees *could be decreased* if the university receives extra appropriations
5. If the council feels a recommendation greater than 5% annually is necessary, the council must document its consideration of:
  - ☐ a) The impact of that increase on students, especially historically underserved students
  - ☐ b) The impact of that increase on the mission of the University
  - ☐ c) Alternative scenarios involving smaller increases
6. The council must also:
  - ☒ a) Provide opportunities for students to actively participate in the process and deliberations
  - ☒ b) Provide a written report to the President with recommendations, deliberations and observations about tuition and fees for the upcoming academic year including any sub-reports requested by members of the council or other documentation produced or received by the council
7. The University must ensure that the process is described on the University's website and include downloadable materials such as:
  - ☒ a) The council's role and relationship to the Board
  - ☒ b) Any documentation, agendas and data considered during deliberations

# Enrollment Context: Student Credit Hour Generation

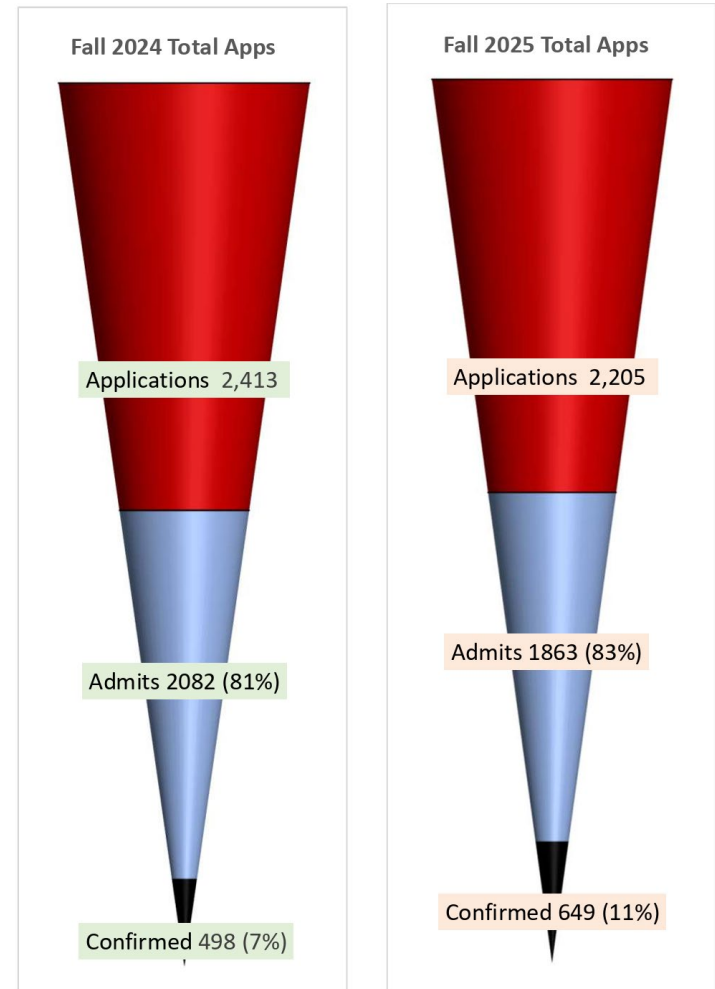


# Enrollment Context: SCH Planning Variables – 1<sup>st</sup> Year & Transfer

Applications				
Student Type	Fall 2024	Fall 2025	Change	% Change
Freshmen - Resident	1,036	976	-60	-5.8%
Freshmen - Nonresident	960	779	-181	-18.9%
Transfer - Resident	115	145	30	26.1%
Transfer - Nonresident	124	135	11	8.9%
Postbacs/Grads	178	170	-8	-4.5%
<b>Total Apps</b>	<b>2,413</b>	<b>2,205</b>	<b>-208</b>	<b>-8.6%</b>

Admits				
Student Type	Fall 2024	Fall 2025	Change	% Change
Freshmen - Resident	967	906	-61	-6.3%
Freshmen - Nonresident	864	699	-165	-19.1%
Transfer - Resident	78	110	32	41.0%
Transfer - Nonresident	91	84	-7	-7.7%
Postbacs/Grads	82	64	-18	-22.0%
<b>Total</b>	<b>2,082</b>	<b>1,863</b>	<b>-219</b>	<b>-10.5%</b>

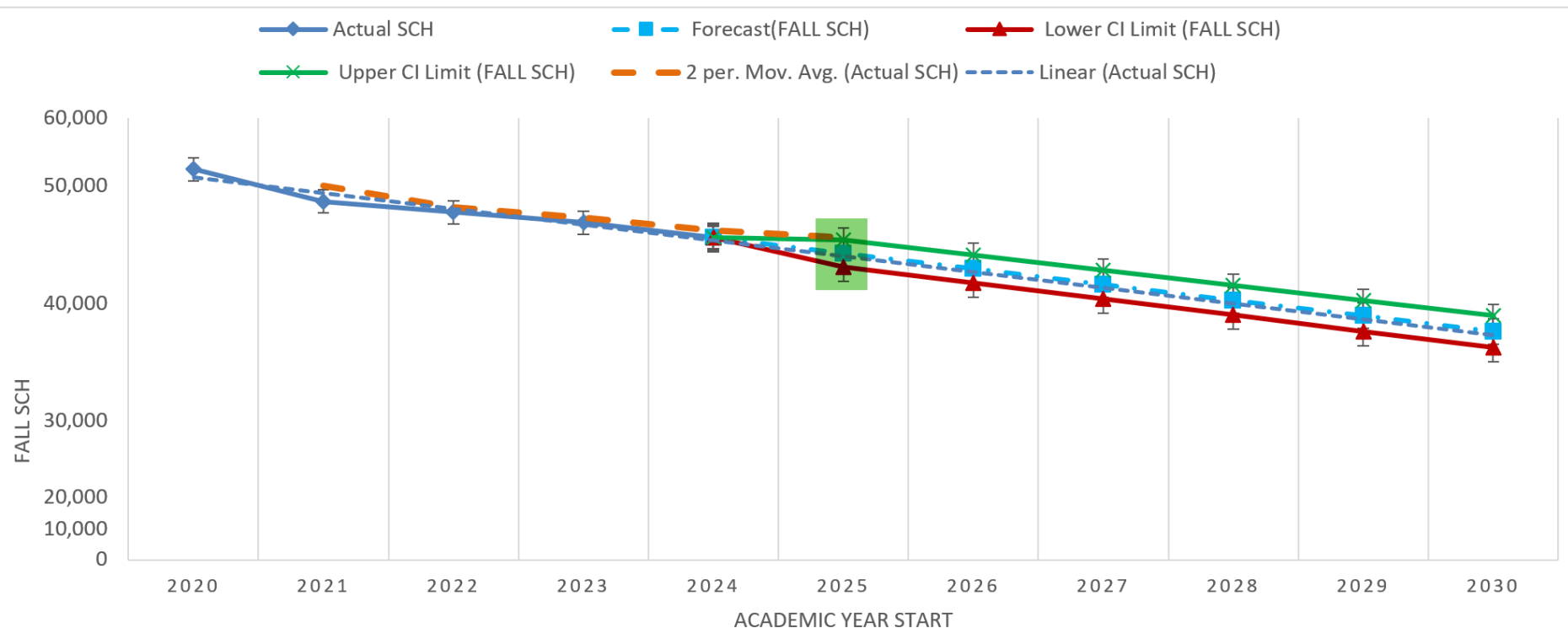
Confirmed				
Student Type	Fall 2024	Fall 2025	Change	% Change
Freshmen - Resident	184	280	96	52.2%
Freshmen - Nonresident	149	187	38	25.5%
Transfer - Resident	43	64	21	48.8%
Transfer - Nonresident	40	54	14	35.0%
Postbacs/Grads	82	64	-18	-22.0%
<b>Total</b>	<b>498</b>	<b>649</b>	<b>151</b>	<b>30.3%</b>



Data Source:  
IR, Weekly Application Activity Report – 25 Weeks Before Start of Term  
\*Excludes ASC/OLLI

# Fall SCH Projections AY25 – AY30

## All Rate Types Included



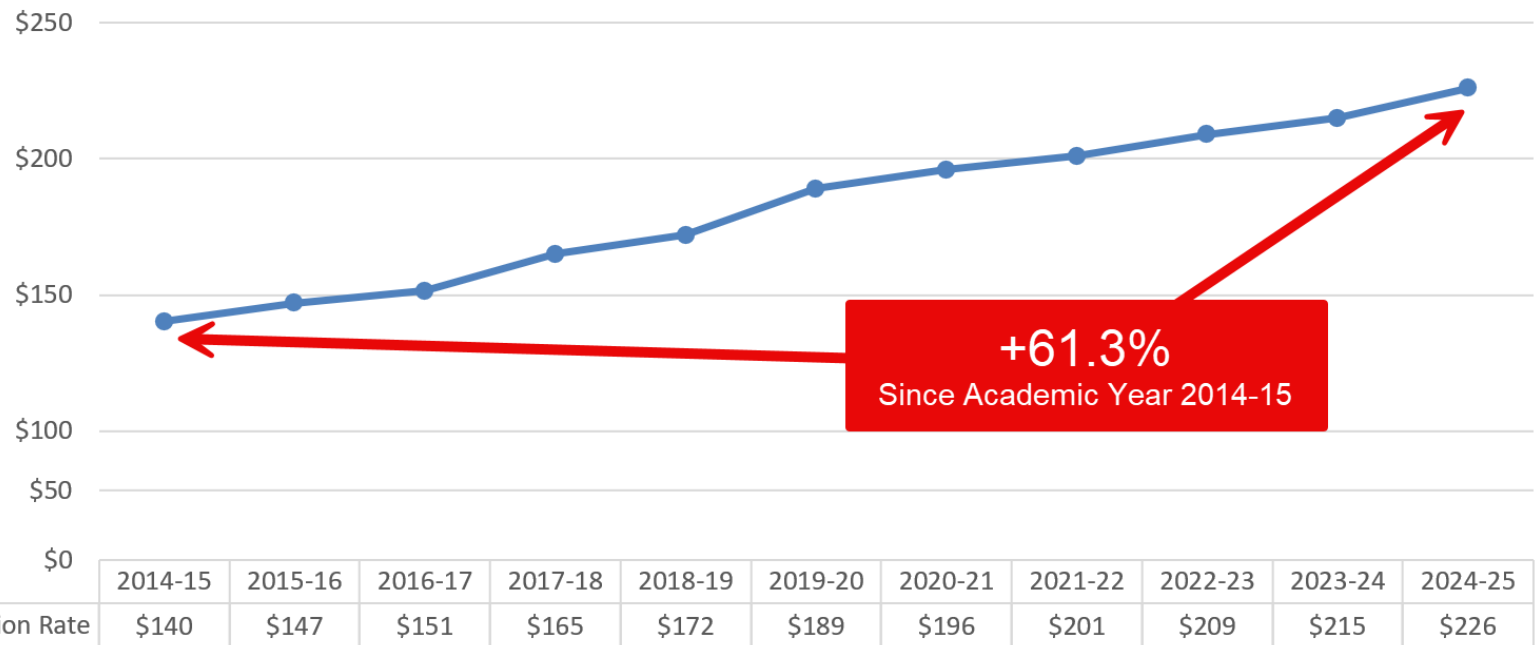
Alt Model Range: 43,109 – 45,445

Un-adjusted Pro forma Weighted SCH Model: 44,337

Adjusted Model (-3%): 43,554

# SOU's Tuition Rate Change History

Resident UG Tuition Rate Academic Years 2014-15 Through 2024-25



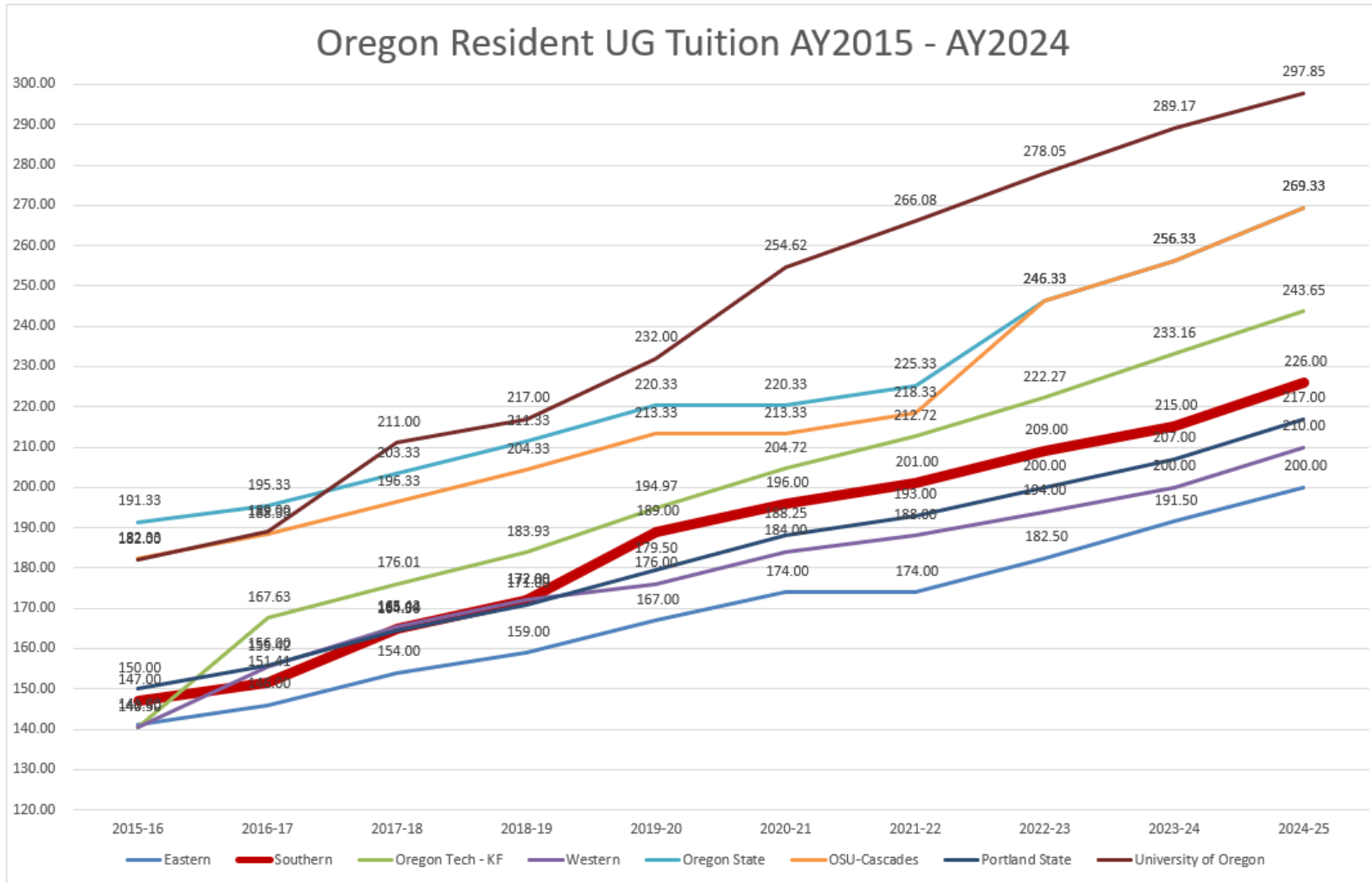
# Historic Rate Comparison

Institution	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25
Eastern	159.00	167.00	174.00	174.00	182.50	191.50	200.00
<b>Southern</b>	<b>172.00</b>	<b>189.00</b>	<b>196.00</b>	<b>201.00</b>	<b>209.00</b>	<b>215.00</b>	<b>226.00</b>
Oregon Tech - KF	183.93	194.97	204.72	212.72	222.27	233.16	243.65
Western	172.00	176.00	184.00	188.00	194.00	200.00	210.00
Oregon State	211.33	220.33	220.33	225.33	246.33	256.33	269.33
OSU-Cascades	204.33	213.33	213.33	218.33	246.33	256.33	269.33
Portland State	171.00	179.50	188.25	193.00	200.00	207.00	217.00
University of Oregon	217.00	232.00	254.62	266.08	278.05	289.17	297.85

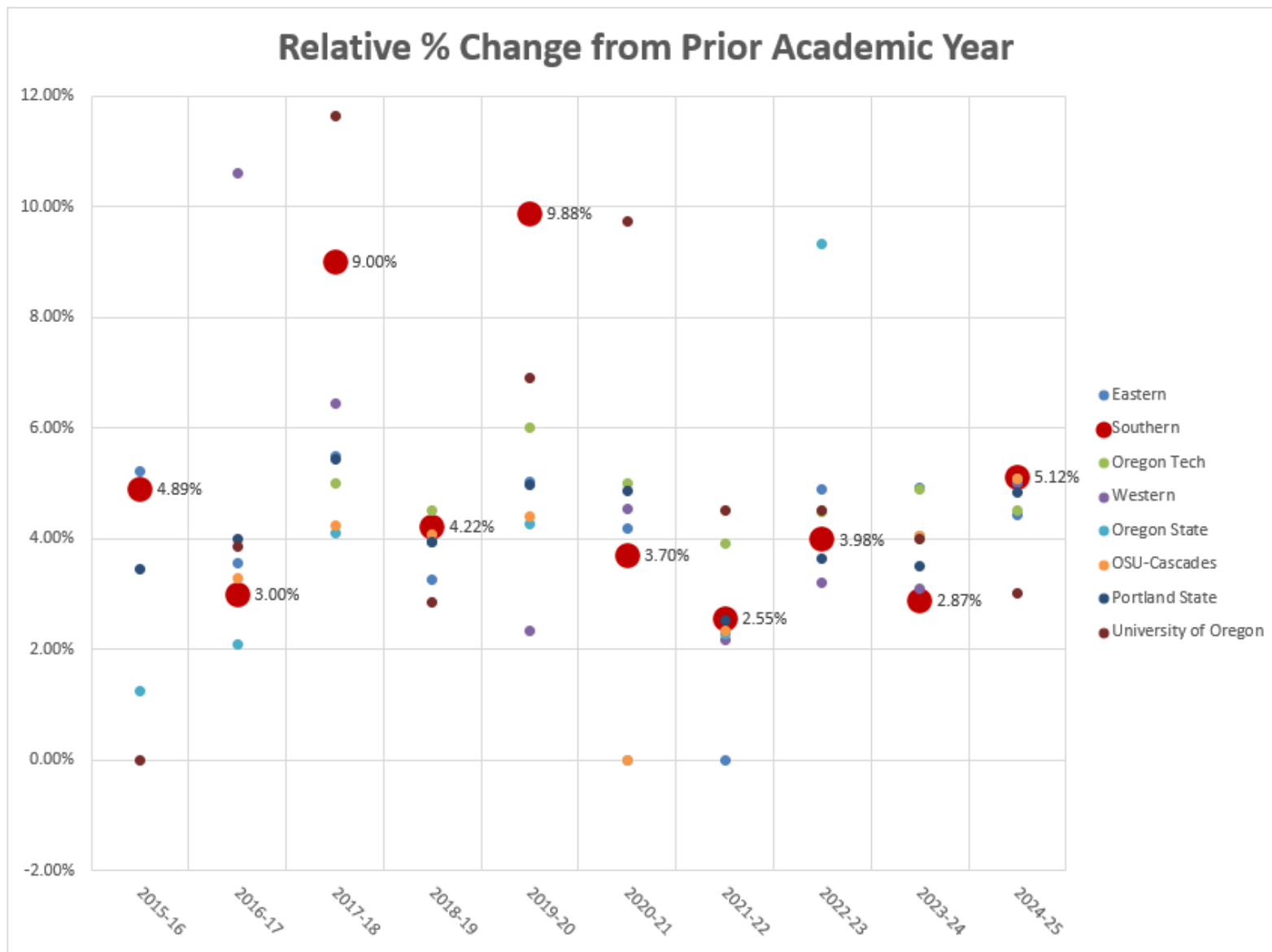
	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25
Eastern	3.25%	5.03%	4.19%	0.00%	4.89%	4.93%	4.44%
<b>Southern</b>	<b>4.22%</b>	<b>9.88%</b>	<b>3.70%</b>	<b>2.55%</b>	<b>3.98%</b>	<b>2.87%</b>	<b>5.12%</b>
Oregon Tech	4.50%	6.00%	5.00%	3.91%	4.49%	4.90%	4.50%
Western	3.98%	2.33%	4.55%	2.17%	3.19%	3.09%	5.00%
Oregon State	3.93%	4.26%	0.00%	2.27%	9.32%	4.06%	5.07%
OSU-Cascades	4.07%	4.40%	0.00%	2.34%	12.82%	4.06%	5.07%
Portland State	3.95%	4.97%	4.87%	2.52%	3.63%	3.50%	4.83%
University of Oregon	2.84%	6.91%	9.75%	4.50%	4.50%	4.00%	3.00%

# Historic Rate Comparison

Note: Undergraduate Resident – Incoming Only



# OPU Tuition Rate Change History



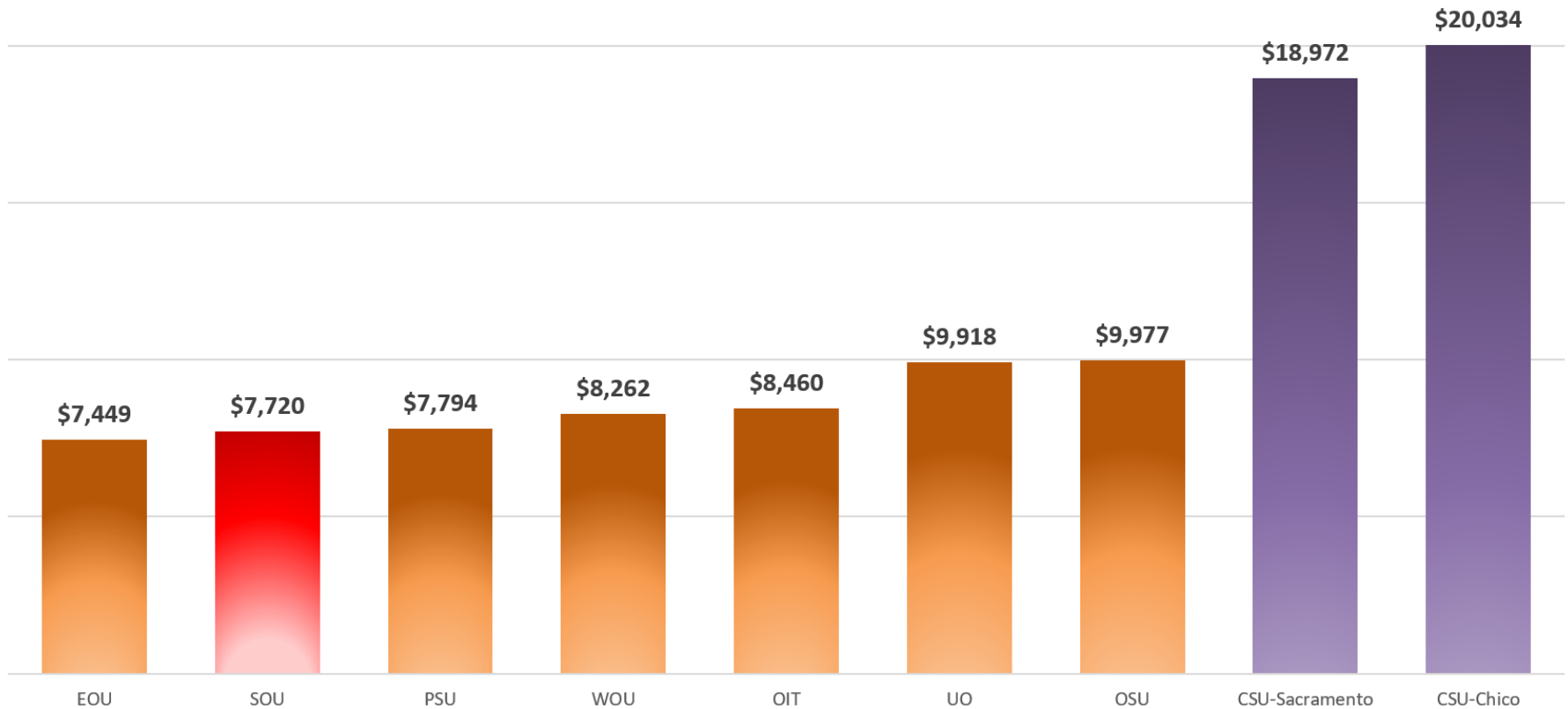
# Composite Tuition & Fees Comparison

(Three terms, 15 SCH/term, all mandatory fees)



## Academic Year Tuition and Mandatory Fees

For full-time undergraduates 2014-15 Academic Year



# Composite Tuition & Fees Comparison

(Three terms, 15 SCH/term, all mandatory fees)



## Academic Year Tuition and Mandatory Fees

For full-time undergraduates **2024-25** Academic Year



# AY 2025-26 Tuition Recommendation

	CURRENT AY	PROPOSED	Academic Year 2025-26 (FY26)				
Undergraduate Tuition Rate per SCH	2024-25	Res: 5.39% Non-Res: 4.99%	% Change from Prior AY	Difference Per SCH	Difference Per Term @ 15 SCH	Difference Per AY @ 45 SCH	Annual Tuition Cost
01-WUE SCH	\$339	\$357.00	5.31%	\$18.00	\$270.00	\$810.00	\$16,065.00
02-UG Resident SCH (incl. EXRES)	\$226	\$238.19	5.39%	\$12.19	\$182.85	\$548.55	\$10,719.00
02.2-UG JackJo Pledge	\$168	\$177.00	5.36%	\$9.00	\$135.00	\$405.00	\$7,965.00
03-UG Non Resident SCH	\$651	\$683	4.92%	\$32.00	\$480.00	\$1,440.00	\$30,735.00
04.2-UG Online SCH NON-RES	\$339	\$356	5.01%	\$17.00	\$255.00	\$765.00	\$16,020.00
04.3-UG Online SCH WUE	\$339	\$357	5.31%	\$18.00	\$270.00	\$810.00	\$16,065.00
Graduate Tuition Rate per SCH		Res: 4.99% Non-Res: 4.99%	% Change from Prior AY	Difference Per SCH	Difference Per Term @ 12 SCH	Difference Per AY @ 36 SCH	Annual Tuition Cost
05-GR Resident SCH (incl. EXRES)	\$566	\$594	4.95%	\$28.00	\$336.00	\$1,008.00	\$21,384.00
06-GR Non Resident SCH	\$667	\$700	4.99%	\$33.28	\$399.39	\$1,198.17	\$25,210.00
07.0-GR AP MBA Online SCH	\$430	\$430	0.00%	\$0.00	\$0.00	\$0.00	\$15,480.00
07.2-GR Online SCH NON-RES	\$566	\$594	4.99%	\$28.24	\$338.92	\$1,016.76	\$21,393.00
07.3-GR AP MS.Ed Online SCH	\$369	\$369	0.00%	\$0.00	\$0.00	\$0.00	\$13,284.00
08-GR - MEDU SCH	\$462	\$462	0.00%	\$0.00	\$0.00	\$0.00	\$16,632.00
Other Categories Tuition Rate per SCH		4.99%	% Change from Prior AY	Difference Per SCH	Difference Per Term @ 15 SCH	Difference Per AY @ 45 SCH	Annual Tuition Cost
09-Staff	\$67	\$71	5.97%	\$4.00	\$60.00	\$180.00	\$3,195.00
10-Waived Tuition SCH	\$0	\$0	0.00%	\$0.00	\$0.00	\$0.00	\$0.00
11-Course Based Tuition SCH	\$127	\$133	4.72%	\$6.00	\$90.00	\$270.00	\$5,985.00
12-Adv Southern Credit SCH	\$56	\$59	5.36%	\$3.00	\$45.00	\$135.00	\$2,655.00
13-Early Entry Credit SCH	\$113.00	\$119	5.31%	\$6.00	\$90.00	\$270.00	\$5,355.00



## ACADEMIC YEAR 2025-26 TUITION RATES RECOMMENDATION

For July 1, 2025 through June 30, 2026

Date: April 7, 2025

To: The Board of Trustees of Southern Oregon University Board of Trustees

From: Richard J. Bailey, Jr., Ph.D., President

### DESCRIPTION OF FUNDS

Tuition Rates as authorized and collected according to ORS 352.102. Rates include:

	CURRENT AY	PROPOSED		Academic Year 2025-26 (FY26)			
Undergraduate Tuition Rate per SCH	2024-25	Res: 5.39% Non-Res: 4.99%	% Change from Prior AY	Difference Per SCH	Difference Per Term @ 15 SCH	Difference Per AY @ 45 SCH	Annual Tuition Cost
01-WUE SCH	\$339	\$357.00	5.31%	\$18.00	\$270.00	\$810.00	\$16,065.00
02-UG Resident SCH (incl. EXRES)	\$226	\$238.19	5.39%	\$12.19	\$182.85	\$548.55	\$10,719.00
02.2-UG Jack/o Pledge	\$168	\$177.00	5.36%	\$9.00	\$135.00	\$405.00	\$7,965.00
03-UG Non Resident SCH	\$651	\$683	4.92%	\$32.00	\$480.00	\$1,440.00	\$30,735.00
04.2-UG Online SCH NON-RES	\$339	\$356	5.01%	\$17.00	\$255.00	\$765.00	\$16,020.00
Graduate Tuition Rate per SCH		Res: 4.99% Non-Res: 4.99%	% Change from Prior AY	Difference Per SCH	Difference Per Term @ 12 SCH	Difference Per AY @ 36 SCH	Annual Tuition Cost
05-GR Resident SCH (incl. EXRES)	\$566	\$594	4.95%	\$28.00	\$336.00	\$1,008.00	\$21,384.00
06-GR Non Resident SCH	\$667	\$700	4.99%	\$33.28	\$399.39	\$1,198.17	\$25,210.00
07.0-GR AP MBA Online SCH	\$430	\$430	0.00%	\$0.00	\$0.00	\$0.00	\$15,480.00
07.3-GR AP MS.Ed Online SCH	\$369	\$369	0.00%	\$0.00	\$0.00	\$0.00	\$13,284.00
08-GR - MEDU SCH	\$462	\$462	0.00%	\$0.00	\$0.00	\$0.00	\$16,632.00
Other Categories Tuition Rate per SCH		4.99%	% Change from Prior AY	Difference Per SCH	Difference Per Term @ 15 SCH	Difference Per AY @ 45 SCH	Annual Tuition Cost
09-Staff	\$67	\$71	5.97%	\$4.00	\$60.00	\$180.00	\$3,195.00
10-Waived Tuition SCH	\$0	\$0	0.00%	\$0.00	\$0.00	\$0.00	\$0.00
11-Course Based Tuition SCH	\$127	\$133	4.72%	\$6.00	\$90.00	\$270.00	\$5,985.00
12-Adv Southern Credit SCH	\$56	\$59	5.36%	\$3.00	\$45.00	\$135.00	\$2,655.00
13-Early Entry Credit SCH	\$113.00	\$119	5.31%	\$6.00	\$90.00	\$270.00	\$5,355.00

\*Note: Online tuition rates that mirror face-2-face rates are excluded for clarity on this table.

### PRESIDENT'S RECOMMENDATION

[X] Approve [ ] Disapprove

President, Southern Oregon University  
Richard J. Bailey, Jr., Ph.D.

4/14/2025  
Date

# TAC's Role with Mandatory Enrollment Fees

- Recommended by TAC to the President
  - These fees are part of composite Tuition & Fees reviewed by HECC
  - Not to be confused with Mandatory Incidental Fees
- Presented by the President to the Board
- Board adopts fee rates for collection (assessment)

# Mandatory Enrollment Fees

Statute: ORS 352.102

- Each public university listed in [ORS 352.002 \(Public universities\)](#) shall have an advisory body to advise the president of the university on the president's recommendations to the governing board regarding resident tuition and mandatory enrollment fees for the upcoming academic year.

# Mandatory Enrollment Fees Transparency

## [HB 2542: Display of Mandatory Fees](#)

**Summary:** Requires each public university and community college to prominently display mandatory fees charged. Each institution shall report to the HECC no later than September 1 of each year a description of efforts to display mandatory fees, description of use of mandatory fee, and financial overview. First applies to 2021-2022 academic year.

**Effective Date:** January 1, 2022

Recommendation in 2024 was to create a composite 'Single Fee' for assessment, but all fee recommendation processes and uses remain the same

# Health Services Fee

- Health Center operations have shifted to La Clinica
  - Service cutover in September 2024
- Clinics available throughout Southern Oregon
- Fee revenue split 88% / 22%
- Some SOU expenses still managed locally

## Recommendation:

- Maintain Service Level Expectations at \$187 per term
- Collaborate with La Clinica early and often

# Building Debt-Service Fee

- Principally for payments on bonds of non-instructional buildings that don't have dedicated revenue outside of incidental fee; i.e., Stevenson Union
  - Excludes those with separate revenue for debt-services
    - Housing, Dining, Student Recreation Center, others
- Debt service will not be able to satisfy required payments by 2030
  - Enrollment decline = fewer dollars supporting the reserves

# Technology Services Fee

- The “Tech Fee” is used to generate a repository of funds to mitigate financial risk associated with larger IT projects and software supporting course delivery and students
  - Modernizing classrooms with newer tech for hybrid delivery
  - Moodle Learning Management System (LMS)
  - Adobe Suite Student Licenses

# Mandatory Enrollment Fees

- **Building Debt-Service & Technology Services Fees**
  - Recommended by Administration (VPFA) to TAC and the President
  - Recommended by the President to the Governing Board
  - Adopted by the Governing Board – included in HECC review/approval
  
- **Health Center Fee (La Clinica)**
  - 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
  
- **Proposed fee schedule as recommended to President by TAC**

Mandatory Enrollment Fees (Per SCH)	Current	Per AY	Proposed	Per AY	\$ ▲ Per Term	\$ ▲ per AY	% ▲
Student Health Services (per SCH)	\$23.38	\$70.13	<b>\$23.38</b>	<b>\$561.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>0.00%</b>
Single Fee Cap	\$187.00	\$561.00	<b>\$187.00</b>				
Building Debt-Service Fee (Per SCH)	\$6.50	\$19.50	<b>\$6.50</b>	<b>\$156.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>0.00%</b>
Single Fee Cap	\$52.00	\$156.00	<b>\$52.00</b>				
Technology Services Fee (per SCH)	\$4.09	\$12.28	<b>\$4.09</b>	<b>\$98.25</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>0.00%</b>
Single Fee Cap	\$32.75	\$98.25	<b>\$32.75</b>				
Composite <b>Enrollment</b> Fees:	\$272.97	\$818.91	<b>\$272.97</b>	<b>\$815.25</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>0.00%</b>



**MANDATORY ENROLLMENT FEES RECOMMENDATION**  
For July 1, 2025 through June 30, 2026 & Summer Term 2025

Date: April 7<sup>th</sup>, 2025  
To: The Board of Trustees of Southern Oregon University  
From: Richard J. Bailey, Jr., Ph.D., President


**DESCRIPTION OF FUNDS**

Mandatory Enrollment Fees as authorized and collected according to ORS 352.102. Fees include:

<b><u>BUILDING DEBT SERVICE - Per Student Credit Hour (SCH)</u></b>	
Building Debt Service Fee Per Term for Academic Year 2025 - 26	\$6.50
Building Debt Service Fee Per Term for Prior AY 2024 - 25	\$6.50
\$ Change Per Term from Prior Year:	\$0.00
% Change from Prior Year:	0.00%
Fee Cap (8 SCH) for Single Fee Assessment:	\$52.00
Building Debt Service Fee - Summer Term 2025	\$4.88
Building Debt Service Fee Prior Summer Term 2024	\$4.88
\$ Change from Prior Year:	\$0
% Change from Prior Year:	0.00%
Fee Cap (8 SCH) for Single Fee Assessment:	\$39.00
<b><u>Programs Supported</u></b>	<b><u>Est. AY Collections</u></b>
Building Debt-Service Reserve	\$404,008
<b><u>TECHNOLOGY SERVICES FEE - Per Student Credit Hour (SCH)</u></b>	
Technology Infrastructure Fee Per Term for Academic Year 2025 - 26	\$4.09
Technology Infrastructure Fee Per Term for Prior AY 2024 - 25	\$4.09
\$ Change Per Term from Prior Year:	\$0.00
% Change from Prior Year:	0.00%
Fee Cap (8 SCH) for Single Fee Assessment:	\$32.75
Technology Infrastructure Fee for Summer Term 2025	\$3.07
Technology Infrastructure Fee Prior Summer Term 2024	\$3.07
\$ Change from Prior Year:	\$0
% Change from Prior Year:	0.00%
Fee Cap (8 SCH) for Single Fee Assessment:	\$24.56
<b><u>Programs Supported</u></b>	<b><u>Est. AY Collections</u></b>
Technology Services and Hardware	\$254,447
<b><u>STUDENT HEALTH SERVICES FEE - Per Student Credit Hour (SCH)</u></b>	
Health Services Fee Per Term for Academic Year 2025 - 26	\$23.38
Health Services Fee Per Term for Prior AY 2024 - 2025	\$23.38
\$ Change Per Term from Prior Year:	\$0.00
% Change from Prior Year:	0.00%
Fee Cap (8 SCH) for Single Fee Assessment:	\$187.00
Health Services Fee for Summer Term 2025	\$17.53
Health Services Fee for Prior Summer Term 2024	\$17.53
\$ Change from Prior Year:	\$0.00
% Change from Prior Year:	0.00%
Fee Cap (8 SCH) for Single Fee Assessment:	\$140.24
<b><u>Programs Supported</u></b>	<b><u>Est. AY Collections</u></b>
Student Health and Wellness Center and Programs	\$1,452,873

**PRESIDENT'S RECOMMENDATION**

[X] Approve [ ] Disapprove

  
\_\_\_\_\_  
President, Southern Oregon University  
Richard J. Bailey, Jr., Ph.D.

4/14/2025  
\_\_\_\_\_  
Date

# One-Time Fees - Matriculation

- Assessed only **once** to new undergrads
  - Often deferred until fully enrolled/taking courses
- Designed to reduce (not eliminate) other student administrative fees that used to exist:
  - Orientation, scheduling, transcripts, degree applications, re-enrollment, etc.
  - Also supports 1<sup>st</sup> year interest groups and learning

Reminder: Approved **\$25.00** increase for AY 2025-26

- From \$350 to \$375

Recommendations: **\$0.00** increase in AY 2026-27

- New \$99 Tuition Deposit will be applied to tuition

# Update on Single Fee

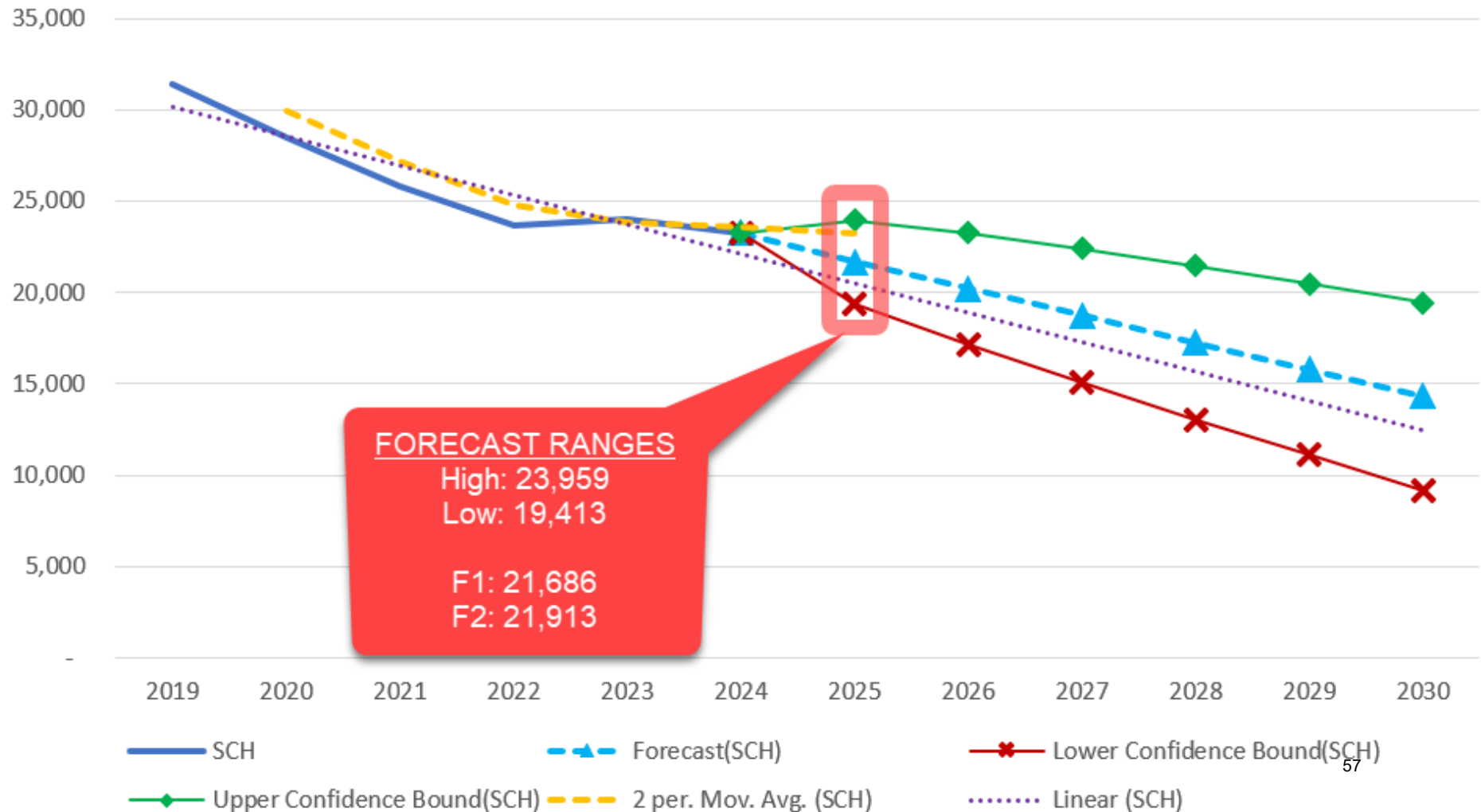
# Single Fee Eligibility

## Not Every Student Pays the Single Fee

- RisePoint Programs (MBA, MS.Ed)
- Community Programs (OLLI, ASC)
- Staff (but dependents DO pay)
- Course-based (Summer Language Institute, etc)
- Exchange students on 'Home Pay' plans
- Waivers per statutes (Federal / State)

# Fee Payer SCH Projections AY 2025–30

Fall Term - Single Fee Payer SCH | History & Forecasts



# Student Credit Hour Projection(s)

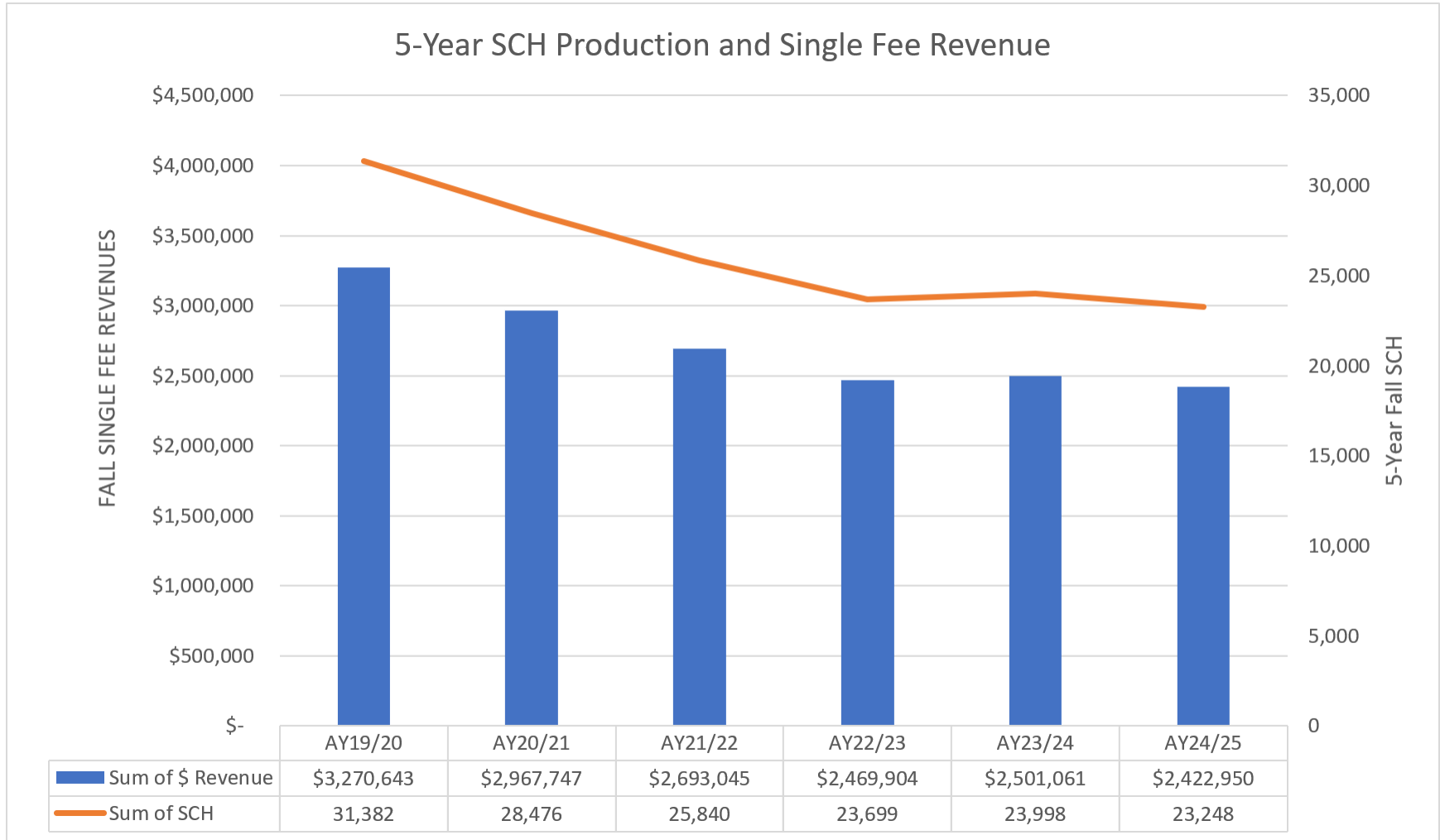
SCH Totals <input type="button" value="v"/>				Attrition Rates		KPI's		
Row Labels <input type="button" value="v"/>	FALL	WINTER	SPRING	Fall To Winter	Winter to Spring	Fall to Fall	Fall to Spring	AY % Change
AY19/20	31,382	29,832	28,086	-4.94%	-5.85%		-10.50%	
AY20/21	28,476	26,600	24,928	-6.59%	-6.28%	-9.26%	-12.46%	-10.41%
AY21/22	25,840	24,229	22,634	-6.23%	-6.59%	-9.26%	-12.41%	-9.13%
AY22/23	23,699	22,766	21,838	-3.94%	-4.08%	-8.29%	-7.85%	-6.05%
AY23/24	23,998	22,340	21,334	-6.91%	-4.50%	1.26%	-11.10%	-0.92%
AY24/25	23,248	21,924		-5.70%		-3.12%		-33.25%

Attrition Model Estimates				Fall To Winter	Winter to Spring	Fall to Fall	Fall to Spring	AY % Change
True Mean	21,918	20,664	19,535	-5.7%	-5.5%	-5.7%	-10.9%	-12.0%
Trunc Mean	21,884	20,600	19,456	-5.9%	-5.5%	-6.9%	-11.3%	-8.5%
5yr Mean	21,882	20,596	19,491	-5.9%	-5.4%	-5.7%	-11.0%	-12.0%
3yr Mean	21,966	20,754	19,862	-5.5%	-4.3%	-3.4%	-9.5%	-13.4%

- ✓ Modeling attrition trends informs decisions for modeling revenues across the fiscal year(s)
- ✓ Key Performance Indicators (KPI's) are useful to monitor larger timescales
- ✓ Attrition Model Estimates are for Academic Year (AY) 2025
- ✓ Attrition Rate means used by the real-time model

# Fall SCH Production Modeling

\*For Single Fee Eligible Rates



# Single Fee Approach

- Students are HAPPY!
  - Some have seen dramatic fee decreases
- Spirit of Board of Trustees
  - Uphold SOU's promise to 'hold students harmless' where feasible
- Better for SOU to not make changes until Workday Student project is complete and all data in one system
- Maintain allocation methodology one more fiscal year
- Not reasonable to change or 'fix' things right now;
  - Proposed tuition rates compensate for some lost revenue

# Cost of Attendance

# Update on Housing & Dining Rates

For informational purposes only



# AY 2025-26 Housing & Dining Rates

For informational purposes

Housing	Current	Curr/AY	New Rate	New/AY	Inc \$/Term	Inc \$/AY	Inc %
Greensprings - Double	\$3,054	\$9,163	\$3,176	\$9,529	\$122	\$367	4.00%
Greensprings - Double-as-Single	\$4,034	\$12,102	\$4,195	\$12,586	\$161	\$484	4.00%
Madrone - Single Apartment	\$4,712	\$14,137	\$4,901	\$14,703	\$188	\$565	4.00%
Shasta - Double	\$3,449	\$10,346	\$3,587	\$10,760	\$138	\$414	4.00%
Shasta - Single	\$4,200	\$12,599	\$4,368	\$13,103	\$168	\$504	4.00%
McLoughlin - Double	\$3,632	\$10,897	\$3,778	\$11,333	\$145	\$436	4.00%
McLoughlin - Single	\$4,510	\$13,529	\$4,690	\$14,070	\$180	\$541	4.00%
McLoughlin - Super Single	\$4,960	\$14,881	\$5,159	\$15,476	\$198	\$595	4.00%
McLoughlin - Studio Single	\$5,060	\$15,181	\$5,263	\$15,789	\$202	\$607	4.00%

Meals	Current	Curr/AY	New Rate	New/AY	Inc \$/Term	Inc \$/AY	Inc %
Red Plan	\$2,184	\$6,552	\$2,271	\$6,814	\$87	\$262	4.00%
Black Plan	\$2,184	\$6,552	\$2,271	\$6,814	\$87	\$262	4.00%
S Plan	\$1,846	\$5,538	\$1,920	\$5,760	\$74	\$222	4.00%
O Plan	\$1,846	\$5,538	\$1,920	\$5,760	\$74	\$222	4.00%
U Plan	\$1,846	\$5,538	\$1,920	\$5,760	\$74	\$222	4.00%
Rocky Plan	\$1,456	\$4,368	\$1,514	\$4,543	\$58	\$175	4.00%
Hawk Plan	\$1,019	\$3,058	\$1,060	\$3,180	\$41	\$122	4.00%
Madrone Plan	\$936	\$2,808	\$973	\$2,920	\$37	\$112	4.00%

\*All figures rounded to nearest whole dollar

# Proposed Resident Undergraduate Cost of Attendance for AY 2025-26

Tuition	Current per Term	Current Per AY	Proposed per Term @15 SCH	Proposed Per AY	\$ ▲ Per Term / Per Credit	\$ ▲ per AY	% ▲
Resident Undergrad	\$3,390	\$10,170	\$3,572.85	\$10,718.55	\$12.19	\$548.55	5.39%
Mandatory Enrollment & Incidental Fees							
Student Incidental & Green Tag	\$444	\$1,332	\$470.00	\$1,410.00	\$26.00	\$78.00	5.86%
Student Rec Center	\$118	\$354	\$118.00	\$354.00	\$0.00	\$0.00	0.00%
Student Health Services	\$187	\$561	\$187.00	\$561.00	\$0.00	\$0.00	0.00%
Building Debt-Service Fee	\$52	\$156	\$52.00	\$156.00	\$0.00	\$0.00	0.00%
Technology Services Fee	\$32.75	\$98	\$32.75	\$98.25	\$0.00	\$0.00	0.00%
Composite Fees:	\$833.75	\$2,501	\$859.75	\$2,579.25	\$26.00	\$78.00	3.12%
Composite Tuition and All Fees:	\$4,224	\$12,671	\$4,432.60	\$13,297.80	\$38.19	\$626.55	4.94%
HECC - Tuition & Mandatory Enrollment Fees:	\$3,662	\$10,985	\$3,845	\$11,534	Academic Year % Change:		4.99%
Housing/Meals							
Shasta Double	\$3,449	\$10,346	\$3,587	\$9,657	\$230	\$0	4.00%
Red Plan	\$2,184	\$6,552	\$2,271	\$6,300	\$50	\$150	4.00%
Composite Housing/Meals Change:	\$5,633	\$16,898	\$5,858	\$17,574	\$280	\$839	4.00%
Cost of Attendance*							
Resident Undergrad	\$9,857	\$29,570	\$10,291	\$30,872	\$318	\$1,466	4.40%

Note: All figures rounded to nearest whole dollar

\*Excludes course fees, books, and other special fees or charges required for specific enrollment situations.

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

**RESOLUTION  
Tuition and Fees for Academic Year 2025-2026**

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

Whereas, the board previously adopted a process for Establishing Tuition and Mandatory Fees;

Whereas, the board authorizes the collection of mandatory student incidental fees that have been recommended jointly by the university president and the recognized student government, and established in accordance with Oregon Law;

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 2025-26;

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 tuition and mandatory enrollment fee recommendations for consideration;

Whereas, the University President has recommended to the Finance and Administration Committee that the proposed tuition and mandatory student incidental and enrollment fees schedules be submitted to the full Board of Trustees for consideration and approval; and

Whereas, the president and the board consider 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, that the Finance and Administration Committee of the Board of Trustees of Southern Oregon University hereby recommends the Board of Trustees approve the tuition rates, mandatory student incidental fees and mandatory enrollment fees as proposed for Academic Year 2025-26, to become effective July 1, 2025. With this approval, the committee further recommends the board authorize the collection of tuition and mandatory fees for the 2025-2026 academic year.

VOTE:

DATE: April 17, 2025

# **Raider Stadium Renovation Project Authorization (Action)**



## Raider Stadium Enhancement Project

### NEW STADIUM UPGRADES TO BENEFIT ALL SPORTS

The Southern Oregon University Raider athletic program has announced a \$1.5 million fundraising campaign to enhance its facilities, including the replacement of a state-of-the-art turf field as well as pro grade LED lights, new visitor's bleachers with visitor's press box, and the possible addition of locker room space for soccer and visiting teams.

This project will benefit many of SOU's NAIA athletics teams—football, men's and women's track and field, cross country, soccer—all of whom will use the facility for practice and competition. It will also continue to serve as a community-wide recreation and wellness resource for students, faculty, and staff; club sports and other intramural teams.

"Our outdoor athletic programs have achieved great conference and national level success," said Athletic Director Matt Sayre "A new turf field will further elevate performance, conditioning, and competitiveness, and it will attract a talented pool of future recruits to the university."

### **\$250,000 Commitment Kick-Starts Fundraising**

The fundraising effort kicked off with a generous commitment of \$250,000 from Don Jones/The Spartan Group, which will be used as a matching challenge to catalyze momentum for the campaign and encourage others to donate. Replacing the turf is the priority.

The university's goal is to raise \$1.5 million for stadium upgrades. Success in this effort will allow the university to achieve its ambitious timeline to complete the facility in time for the Fall 2026 athletic season.

*“It is hard to overstate the importance of this project to our university. We are committed to creating an exceptional athletic environment that attracts top talent and enhances the overall experience for our fans and supporters.”*

--Rick Bailey, President

## **Key Features and Benefits**

### **Artificial Turf**

SOU last replaced the turf in Raider Stadium in 2013. The turf replaced a natural grass field at that time, which has greatly improved access, playability and aesthetics as well as reducing water usage and maintenance costs. The decade-old turf is at the end of its viability.

### **Energy-efficient Lighting**

With a growing number of programs and student-athletes within SOU's intercollegiate and club programs, practices on SOU's field currently extend late into the evening. The current light system, installed in the 1980s, is not energy efficient nor adequate. Modern LED fixtures—which can be set, dimmed, and controlled remotely—will provide ample illumination for practices and playoff games, irrespective of weather and time of day.

### **Bleachers and Press Box**

Safe, comfortable seating is a key ingredient to creating an exceptional SOU experience for supporters, parents and grandparents, as well as fans from opposing teams. The visitor's bleachers, used for all home outdoor sporting events and the university's June commencement ceremony, is a relic from the 1980s. The revamped bleachers will also include a visitor's press-box and video platform, creating a larger space for media and game-day visiting coach's area.

**Southern Oregon University  
Board of Trustees**

**RESOLUTION**

**Raider Stadium Renovation Project**

Whereas, the Athletics Program at Southern Oregon University (SOU) is deemed to be advantageous to the academic environment, cultural and physical development of the students, and the recruitment and retention of students at SOU;

Whereas, the university's Athletics Program seeks to provide facilities and resources for its student-athletes and coaches to achieve success;

Whereas, the university seeks to replace an aging turf field and to modernize lighting, bleacher seating, and a press box area to 21<sup>st</sup> century standards for the primary use of the University's football and sports teams, as well as campus community uses such as commencement and the National Guard deployment;

Whereas, the project will be supported entirely by private philanthropy with no material impact on the University's operating or capital projects budgets;

Whereas, the cost of the stadium renovation project is approximately \$1,500,000 and can be phased for the three major project components: artificial turf; energy-efficient lighting; and bleachers and a press box;

Whereas, the Board of Trustees of Southern Oregon University retains sole authority for the approval of a capital project budget that is anticipated to exceed \$500,000 when restricted bond funds, restricted public grant funds, or restricted gift funds have not been secured for the entire cost of the project; and

Whereas, The Board of Trustees of Southern Oregon University has delegated authority to the university president the approval of a capital project budget that is anticipated to exceed \$500,000 when restricted gift funds have been secured for the entire cost of the project and when that capital project has been authorized or formally prioritized by the Board; and

Be it resolved, the Finance and Administration Committee refers this matter to the full Board of Trustees recommending approval of the following:

1. The Board of Trustees provides a conditional authorization to complete the Raider Stadium Renovation Project wholly, or in phases, provided the following conditions are met:

- A. No phase of the project shall begin before funding for that phase is received;
  - B. No phase of the project shall obligate Southern Oregon University to a future phase of the project; and
- 2. The source of funds for all phases of this project shall be philanthropic gifts or grants that have been received.

Be it further resolved, that the President of the University is authorized to enter into a zero-interest loan with low or nominal fees for bridge funding of the project, if need be, provided that the full loan obligation is backed by bona fide donations or pledges for the full amount of the project or individual phases; and

Be it finally resolved, that this conditional approval does not include the naming of any outdoor building or spaces. The board retains sole authority for the approval of the naming of university buildings or outdoor areas in recognition of individuals or organizations and for the naming of a university building or outdoor spaces required by any gift to the university.

VOTE:

DATE: April 17, 2025

# Core Information System Replacement (CISR) Project Update

# Workday Student



# Anticipated Transition Timeline

## Fall 2025

### Phase 1 Shift Admissions

**Begin accommodating applicants for Fall 2026 in Workday**

#### Includes:

- *Programs of study*
- Catalog
- Academic calendars
- Financial Aid for students starting Fall 2026

## Spring 2026

### Phase 2 Shift Academics

**Move all academic processes to Workday in preparation for Fall 2026**

#### Includes:

- Academic records
- *Advising and registration*
- *Overrides*
- New student onboarding

## Summer 2026

### Phase 3 Shift Billing & Payment

**Manage accounting for Fall 2026 in Workday (spring and summer will still occur in Banner)**

#### Includes:

- Billing
- Payments
- All accounting for Fall 2026

## Fall 2026

### Phase 4 Complete Transition

**Solidify Workday as single source of truth for all student data, ensuring accuracy, consistency, and efficiency**

#### Includes:

- *Grades*
- Refunds
- Transcripts
- Graduation



# Change Management Plan

## **Campus Communication & Engagement**

- Leadership involvement, visit key campus groups, newsletters, website, all campus communication

## **Campus Outreach**

- Faculty Advisory Group, CISR Connect (staff), student focus groups, testing recruitment

## **Training and Support**

- Live sessions, recordings, training guides, support, and updates



# Sneak Peek: The Student Experience

## Self Service Features

- Students can update personal info, track academic milestones, and request transcripts

## User-Friendly Interface

- Modern, intuitive design makes it easy to navigate and complete tasks efficiently
- Everyone has real-time access to student information and reports
- Students can register for courses, check grades, and manage their progress from any device

## Transformed Financial Aid

- Students can manage tuition payments, financial aid, and scholarships in one place
- Workday vastly reduces manual processes, eliminating need for paper forms
- Benefits packaging is faster (especially for summer term!) and more accurate

Personal notices, tasks, & profile

Good Afternoon, Alexandre Manette

Dashboard for student apps

It's Wednesday, February 26, 2025

### Awaiting Your Action

You're all caught up on your tasks.

### Timely Suggestions



#### Registration Appointment Starting Soon

Prepare to register for Summer Term 2025 courses on 03/09/2025 at 9:45 AM PDT

[Find Course Sections](#)

Quick access to pending tasks and helpful suggestions

### Your Top Apps



Academics



Finances

[View All Apps](#)

Faculty/staff view  
(security controlled)



Alexandre Manette  
(A1111112)

Student | Southern Oregon University

Actions

Make  
changes

### Account Activity

0.00

Total Account Balance

0.00

Due Now

View Statement

[View Details](#)

### Housing Assignment

Current Housing Status

Off Campus

### Student Information

Universal Id

▼ Southern Oregon

Student Status

Active

Academic Level

Undergraduate

Class Standing

Freshman

Academic Unit

Biology Department

Primary Program of Study

Biology BS Major

Access  
student profile  
& details



Summary



Personal



Contact



Academics



Student Financials



Financial Aid



History



Action Items and Holds



**Alexandre Manette**  
(A11111112)

Student | Southern Oregon University

Actions

Actions

- Academic Record >
- Action Items >
- Admissions >
- Advising >
- Athletics >
- Engagement >
- Financial Aid >
- Financials >
- History >
- Personal Data >
- Residency >

**Student Information**

Universal Id

A11111112

**Account Activity**

0.00

Total Account Balance

0.00

Due Now

**Student**

Alexandre Manette

Action menu

Universal Id A11111112

**Southern Oregon**

Academic Records 1 item

Academic Record	Academic Unit	Active Programs of Study
	Biology Department	Biology BS Major

# Alexandre Manette (A1111112)

Student | Southern Oregon University

Actions



Summary



Personal



Contact



Academics



Student Financials



Financial Aid



History



Action Items and Holds



Student History

Event History

Additional Data

Actions taken

9 items



Date	Category	Action	Details
11/13/2024 06:38 PM	Hold	Hold Applied	Apply: Registration Add - Final Documents Needed
11/13/2024 06:09 PM	Hold	Hold Applied	Apply: Full Registration - Undeclared Major
09/19/2024 12:58 PM	Admissions	Stage Progression	Student
09/19/2024 12:57 PM	Admissions	Admission Decision - Admit	<a href="#">Alexandre Manette (A1111112)</a> (applying for: Biology BS Major)
09/19/2024 12:57 PM	Admissions	Review Status - Complete	<a href="#">Alexandre Manette (A1111112)</a> (applying for: Biology BS Major)
09/19/2024 12:54 PM	Student Recruiting	Created Recruitment	<a href="#">Alexandre Manette</a>



# Alexandre Manette (A11111112)

Student | Southern Oregon University

Actions



Summary



Personal



Contact



Academics



Student Financials



Financial Aid



History



Action Items and Holds

Student History

Event History

Additional Data

Processes applied

View All

No Filters Applied

Saved Filters

select one



11 items



Business Process	Functional Area(s)	Effective Date	Initiated On	Initiated By	Status
Apply: Registration Add - Final Documents Needed	Action Items and Holds		11/13/2024 06:38:17.381 PM	Shawn McCann	Successful
Apply: Full Registration - Undeclared Major	Action Items and Holds		11/13/2024 06:09:46.356 PM	Shawn McCann	Successful
Student Onboarding: Alexandre Manette (A111111112) - Biology Department/Undergraduate (BS) - 09/23/2020 - Active	Student Records		09/19/2024 12:58:59.094 PM	Shawn McCann	Successful
Student Application Decision Event: Alexandre Manette (A111111112) (applying for: Biology BS Major)	Admissions		09/19/2024 12:57:00.736 PM	Shawn McCann	Successful
Event: Southern Oregon University group for STUDENT APPLICATION DATA LOA	Student Recruiting		09/19/2024 12:54:31.721 PM	Shawn McCann	Successful



Alexandre Manette  
(A11111112)

Student | Southern Oregon University

Actions



Summary



Personal



Contact



Academics



Student Financials



Financial Aid



History



Action Items and Holds

Overview

Current Classes

Plan

Academic History

Academic Progress

More ▾

▾ Biology Department/Undergraduate (Biology BS Major)

Student Alexandre Manette (A11111112)

Institution Southern Oregon University

Educational Objective 1 item



Program of Study	Declare Date	Expected Completion	Status	Primary	
Biology BS Major	09/23/2020	06/14/2024	In Progress	Yes	<a href="#">Request</a>

# Thanks for Your Support!



[Workday Wins](https://sou.edu/cisr)  
[Workday Website](https://sou.edu/cisr)  
([sou.edu/cisr](https://sou.edu/cisr))

# Future Meetings

# Adjournment