

**PUBLIC MEETING OF THE WOU BOARD'S
FINANCE & ADMINISTRATION COMMITTEE (FAC)
Meeting No. 11 – April 5, 2018
Public Site: Werner University Center, Columbia Room-A
9:00 AM – 1:00 PM**

AGENDA

I. CALL-TO MEETING/ ROLL CALL

II. COMMITTEE CHAIR'S WELCOME / ANNOUNCEMENTS

III. CONSENT AGENDA

- 1) Approval January 4, 2018 Meeting Minutes [Page 1](#)

IV. ACTION ITEMS:

- 1) FY2018 February 28, 2018 Management Report – Jay Kenton/Camarie Campfield [Page 10](#)
- 2) 2019-21 and beyond Capital Budget Review – Michael Smith [Page 15](#)
- 3) Tuition and Fees – Jay Kenton
 - a) 2018-19 Proposed Rates [Page 29](#)
 - b) WOU Tuition Promise [Page 77](#)
 - c) HB4141: Tuition Advisory Committee [Page 78](#)

V. DISCUSSION ITEMS:

- 1) Investment Report – Penny Burgess [Page 81](#)
- 2) UBC Report – Katherine Schmidt [Page 88](#)
- 3) 2018-19 Budget preparation update – Jay Kenton/Camarie Campfield
- 4) A New Paradigm in Administration at WOU – Jay Kenton [Page 93](#)
- 5) Quasi Endowment – Jay Kenton

VI. UPDATES AND AROUND-THE-TABLE / BOARD MEETING PREP

VII. ADJOURNMENT

**Western Oregon University Board of Trustees:
Finance & Administration Committee
Meeting No. 10 – January 4, 2018
Public Site: Werner University Center, Willamette Room
9:00 AM – 1:00 PM**

DRAFT MINUTES

I. CALL-TO MEETING / ROLL CALL

The meeting was called to order at 9:07am.

Committee members present: Jaime Arredondo, Marshall Habermann-Guthrie Guthrie, Ivan Hurtado, Cec Koontz (chair), Eric Yahnke (Vice President for Finance and Administration & CFO)

Others present: Kristin Diggs (Eide Bailly, via teleconference), Kella Helyer (Financial Aid Director), Malissa Larson, Brandon Neish (Budget & Payroll Manager), Emily Pfeiffer, Greg Zobel

II. COMMITTEE CHAIR'S WELCOME / ANNOUNCEMENTS

Chair Koontz welcomed everyone to the meeting. There were no announcements to be made at this time.

III. CONSENT AGENDA

- 1) Approval October 12, 2017 Meeting Minutes

Marshall made a motion to approve the minutes as is. Jaime seconded the motion and all were in favor.

IV. ACTION ITEM:

- 1) [FY2017 Annual Financial Statements](#)

Kristin Diggs of Eide Bailly shared about the audit they conducted. The focus was on areas that are considered risky--student financial aid, federal grants, student receivables/student revenue, and GASB 68 and 71. This process started in May of 2017 with planning procedures and federal revenue testing and ended in November of 2017 with the issuance of the financial statements and compliance report. Eide Bailly gave an unmodified audit opinion, which is the highest opinion that can be given. Everything was found to be materially accurate. They also found that the

findings from last year had been addressed by the university.

Jaime made a motion to recommend that the board approve the 2017 financial statements. Marshall seconded the motion and all were in favor.

2) FY2018 Q2 Management Report

Brandon Neish shared the details of the second quarter management report. Due to the timing of this meeting the management report is in preliminary form with numbers that will still change before the period closes (including the addition of December payroll). We are projecting a 14.5% fund balance for this year. We had anticipated a 3% decline in enrollment, but we are seeing about a 2% decline instead. While this is better than what was budgeted, it is still down from last year and is the seventh year in a row of declining enrollment.

Ivan made a motion to recommend that the board accept the preliminary Q2 management report. Marshall seconded the motion and all were in favor.

V. **DISCUSSION ITEMS:**

1) Capital Allocation Update

The seven vice presidents met to revise allocation methodology for prioritizing capital construction projects. At a bit of a standstill until the status of the OSU Cascades campus is more clear. For right now we are continuing to do what has been done in the past with each campus submitting the projects that are most important to them. ITC and OMA phase 2 were funded. There is an RFP out for a lobbyist for the four TRUs. We are hoping to have someone in place for the February session.

2) All-in Cost of Attendance

VP Yahnke shared about the cost drivers we face that influence our tuition increases. Salary and benefits make up over 80% of our total cost. Our current service level calculation has been updated with negotiated salary and benefit rate increases and the PERS rate increase that is expected in the next biennium. WOU's biennial increase is \$11.9 million, an 8.5% increase. This is primarily because about 25% of our employees are in tier 1 and tier 2. Retirement costs will increase about \$4.8 million (29%) for the biennium. The cost per student --to cover this increase--comes out to \$2,600 per student FTE per biennium (or \$19 per credit hour for the student's portion).

Remissions currently make up 11.4% (\$4.9 million) of our gross tuition revenue. Traditionally we've been around 10%. The national average is around 14 or 15%, but those institutions don't have the promise program that freezes tuition.

VP Yahnke introduced Kella Helyer (Financial Aid Director) to share how we help our students meet their educational expenses. Kella provided a list of our remissions programs and initiatives since 2015-2016 and discussed each one in detail.

VI. UPDATES AND AROUND-THE-TABLE / BOARD MEETING PREP

The Tuition Advisory Committee has started meeting. The committee provides an informal setting for students to ask questions about university finances.

The campus master plan process is underway. SRG is the firm facilitating the process. There are several meetings scheduled for January and February and we will be getting a phase one report the beginning of February. The project is expected to be completed this spring. The natural science building renovation project is moving forward and there will be some savings from not needing to fully move them over to the old COE building. The contract for the redesign of OMA and ITC has been awarded to Hennebery Eddy Architects.

University Budget Committee (UBC) meetings are ongoing. The committee reviewed cost reduction proposals from last year and is discussing the process for new initiatives. We are looking at a \$1.4 million structural deficit. The cuts supported by the UBC total around \$3 million, which could provide extra money for new initiatives. We will be hosting a workshop this month to open the process to campus. Currently there are in excess of 20 requests for various opportunities.

Public safety held an active killer drill in December. The policy and operations teams conducted a tabletop exercise following the drill.

VP Yahnke announced that a re-organization has taken place and the Payroll office is now a function of Human Resources.

VII. ADJOURNMENT

The meeting was adjourned at 12:47pm.

Finance and Administration Committee (FAC), 2019-21 Capital Budget and Beyond

IV. 1) FY2018 February 28, 2018 Management Report

The attached quarterly management reports are as of February 28, 2018. Both reports contain the same data, just presented in different formats. The first being consistent with what you have seen in the past, and the second being a new format. We wanted to present both so that the committee could compare and decide which layout they found more helpful as we will adopt that method going forward.

Committee Recommendation:

The Finance and Administration Committee recommends that the Board accept the February 28, 2018 Management Report. The next management report as of May 31, 2018 is scheduled to be presented to the FAC on July 5, 2018.

IV. 2) 2019-21 and Beyond Capital Budget Review

The Higher Education Coordinating Commission (HECC) will require that WOU submit a capital budget in April/May 2018 to be considered in the 2019-21 Legislative session. This budget will need to contain any capital projects for which the institution is requesting bond funding. While the request primarily focuses on projects to be funded during the 2019-21 time frame, they also are asking WOU to provide capital projects that would be undertaken from 2019-2025, or three biennia.

Given this, we have prepared the following capital budget for the Finance and Administration Committee's consideration. This request was prepared by our Facilities Department who consulted with the campus on facility needs, etc. This list was then discussed with and approved by the President's Cabinet and the University Budget Committee.

As you know, we are currently updating our Campus Master Plan. Thus, while the timing of this request is somewhat out of synch with that planning process, we are confident that these projects will be consistent with the outcomes of that process.

Michael Smith, Director of Facilities will now present the capital budget and the projects we would like you to consider submitting for the HECC capital budget development process.

Committee Recommendation:

The Finance and Administration Committee recommends that the Board approve the 2019-25 capital budget as presented.

Finance and Administration Committee (FAC), Tuition and Fees

IV. 3i) 2018-19 Proposed Tuition Rates

In developing these proposed rates, we worked with a Tuition Advisory Committee (TAC) comprised of interested students and the Chair of the University Budget Committee (UBC) to solicit input into the process. The TAC meet on the following dates (see wou.edu/tac for additional materials, meeting minutes and other resources):

- December 6, 2017 – 11:30 a.m. – 1:30 p.m.
- January 12, 2018 – 11:30 a.m. – 1:30 p.m.
- February 2, 2018 – 11:30 a.m. – 1:30 p.m.
- February 16, 2018 – 11:30 a.m. – 1:30 p.m.
- March 2, 2018 – 11:30 a.m. – 1:30 p.m.

In addition, we sponsored an all-student forum with President Fuller and Interim VP Kenton on March 5, 2018 and briefed the WOU Student Senate on February 8, 2018 and again on March 8, 2018. We also met with the Graduate Council on graduate tuition rates. For context, see attached spreadsheet for how WOU tuition and fee rates compared to other public universities and local community colleges during the current year.

The results of these deliberations were recommendations to increase tuition as shown on the following spreadsheet. These rates contrast to the following 2018-19 resident undergraduate rates that have either been approved, or are in process, at other public universities in Oregon:

EOU – 3.3% - in process

OIT – 4.5% - approved

OSU – likely 3.5% - 4.0% - in process

PSU – likely 4.98% in process

SOU – 4.22% - approved

UO – 2.84% - approved

WOU – 4.25% - with a \$400,000 increase in need-based fee remissions

In addition, the attached 2018-19 Academic Year and 2019 Summer Session Fee Book has been updated with these proposed changes and contains other policy changes to allow all students from Texas to qualify for WUE tuition rates (see page XX), to update the room and board rates for next year and with updated language on programmatic fee remission programs that have been used at WOU for many years, yet lacked a definition in this document.

Committee Recommendation:

The Finance and Administration Committee recommends that the Board approve these proposed tuition and fee rate changes and adopt the 2018-19 Academic Year and 2019 Summer Session Fee Book. Please note that in adopting these tuition rates the students wanted the Board to also specifically approve increasing programmatic fee remissions by \$400,000 targeted to low-income, first generation and underserved student populations.

IV. 3ii.) WOU Tuition Promise

The TAC also asked for an analysis of the WOU Tuition Promise Program. This analysis is contained in the following spreadsheet. This document shows that while students who entered the Tuition Promise program in 2011-12 actually saved 2.24% on tuition costs over their four-year stay at WOU compared to students who did not elect the Promise, students who entered in 2012-13, 20123-14 and 2014-15 paid between 5.60% and 8.1% more in tuition over their four-years at WOU.

This analysis prompted a discussion about whether WOU should continue offering the tuition promise program into the future. Given the increased scrutiny of tuition rates by the Legislature via increased use of budget notes restricting tuition increases to less than 5%, closer review by the Higher Education Coordinating Commission (HECC) and University Boards and student unrest at some institutions, we may be entering a time of less volatility in tuition rates. In the TAC first discussion of this topic, most students supported keeping the Tuition Promise, although most members wanted to have much better information about the Promise and non-Promise rates prior to having to make the choice between the two methodologies. However, when it came up at our last meeting, most students favored eliminating the Tuition Promise program, while continuing to honor pre-existing Promise contracts until their expiration for pre-existing students. One of the reasons cited was that all students should be treated the same as Promise students have little interest in on-going tuition setting discussions. Given our student recruitment materials and conversations between our admissions officers and students and/or their families, we do not feel that we can eliminate this program for Fall 2018. Thus, if we choose to eliminate the program the earliest opportunity to do so would be for the Fall 2019 cohort of students.

Committee Recommendation:

The Finance and Administration Committee recommends that the Board approve placing the WOU Tuition Promise program on inactive status effective Fall 2019 for new students while continuing to honor pre-existing contracts for students currently in the program as well as those who may opt into the program this coming Fall 2018. This would allow the institution to experiment with new tuition structures after that time, but bring the program back in the future if desired.

IV. 3iii) New Statute re. Tuition Advisory Committee

House Bill 4141 (see attached) was approved by both houses and signed into law by the Governor following the February 2018 Legislative Session. This bill requires “each public university... to 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.” This bill prescribes membership on this advisory body, requires a written document describing the role of this advisory body and its relationship to the president and governing board, and requires training on: a) the university’s budget for members, b) Legislative mechanisms by which monies are appropriated and allocated to the university, c) historical data

about the relationship between tuition and Legislative appropriations, d) a plan for managing costs on an on-going basis, and e) a plan for how tuition could be reduced if the university receives more funding from the state.

Committee Recommendation:

Informational only at this time, no action required.

V. 3. 2018-19 Budget Preparation Update

We have been working diligently to begin preparation of the 2018-19 operating budget. Since, this will be the mid-biennial year, we already have a good idea of what our State General Fund budget will be, plus or minus any adjustments as a result of the annual settle-up process. This combined with the tuition and fee rates you just considered and a conservative estimate of enrollment growth of +1% for resident UG and WUE enrollment and flat enrollments of non-resident undergraduate and graduate students allow us to project Education and General (E&G) fund revenues of \$71.7M in 2018-19. This contrasts to a budgeted E&G revenues of \$68.3M and projected revenues of \$71.0M revenues in 2017-18. Please note these amounts include fee remissions of \$5.68M for 2018-19 which represents tuition discounts of 12.4%, up from the 11.4% budgeted in 2017-18. Thus, moving WOU tuition discounts closer to peer averages of ~15% and helping WOU to lower its net cost to students.

For expenses we have increased student pay and graduate assistant salary budgets by 16.2% which mirrors the increases in the State's minimum wages from \$9.25 effective January 1, 2016 to \$10.75 in July 2018. We have also increased graduate assistant fee remissions (which are not included in the tuition discounts amounts/percentages above) by the same 3% that we proposed to increase resident graduate tuition. We also have been able to pick up an annual savings in excess of \$400K from our migration away from the Shared Services Fifth Site service to the Banner Cloud as well as other areas that were slightly over budgeted.

We are currently meeting with all divisions and colleges to validate salary rosters (salary amounts, FTE, etc.) and to discuss other budget issues relating to their units. This process apparently has not been done for a number of years, thus the conversations are robust as are the needs being expressed. These conversations have also highlighted the need to better align the current budget structure with the organization structure in the units as many have changed over time.

Simultaneously, the President Cabinet reviewed proposals for budget increases and has forwarded the top priorities to the University Budget Committee (UBC) for review and comment. That process is underway at this time.

In addition, we have tentatively established reserves for: 1) salary increases (as collective bargaining with the WOUFT are on-going), 2) strategic initiatives, and 3) for PERS increases to happen in 2019-20. Finally, we are projecting to spend down fund balance by \$780K for the first installment of the retirement window program in which 30 employees opted to take these

incentives and retire early. These are payments over the next two years and thus should not be part of the recurring budget.

We are optimistic that we will have the budget ready by the end of May, thus it could be approved at your next meeting and during the July 2018 meeting of the full Board.

Committee Recommendation:

Informational only at this time, no action required.

V. 4. A New Paradigm in Administration at WOU

One of the things I have found as I've made my rounds at EOU, OIT and now WOU is that many processes were antiquated and based on old control paradigms. For example, most of the controls I found at these institutions have been based on preventive controls whereas with the advent of modern technology and on-line, real time computer systems, we can effectively manage the institution with detective (e.g., after-the-fact) controls. With this, we are also attempting to better align authority, responsibility and accountability and to push decisions out to departments closer to their point of impact. This will empower departments to have better control over their affairs, while streamlining the work for both the departments and the Business/Budget offices. This will allow the Business/Budget Office to turn their focus from processing transactions to more training, instructional auditing and higher level financial analyses, reconciliations with an improved focus on financial strategies that will allow the institution to grow and prosper.

To effect this type of change we have been actively working with the process owners and stakeholders to redefine many of our processes for budgeting, processing travel, procurement and contracting to streamline these activities and make sure they are done once, correctly. This communication has taken the form of active discussions with members of the President Cabinet, University Budget Committee, Deans, Division Heads and other stakeholders throughout the university. After actively listening to, and working with, these groups, the President sent the attached e-mail to the campus announcing the changes.

Since this time we have been busy updating policies for travel and procurement, providing enhanced training on these new processes and policies. This training is taking many forms, from workshops on travel, procurement and accounts payable to workshops on appropriate use of the procurement card and how to manage a budget. This will become part of an on-going effort to keep existing and new employees apprised of these processes and policies going forward. These training session occur in both group session using standard examples to one-on-one training using examples specific to the department and person being trained.

Committee Recommendation:

Informational only at this time, no action required.

V. 5. Quasi Endowment

One tool available to a university that has excess fund balance is to have the Board transfer funds to establish a quasi-endowment, otherwise known as funds functioning as an endowment. Through this process, funds would be transferred out of the Education and General (E&G) fund to the quasi-endowment fund. These funds would then be invested with other endowments in a mix of equities and other investments and the investment earnings could be used for need-based, merit-based, diversity, international or other scholarships as the Board directed. In the future, these funds could be moved back to E&G again with the approval of the Board. The only drawback to this approach is that these funds will be invested in equities which can fluctuate substantially in the short-run. Because WOU has a healthy E&G fund balance (projected at 22.5% at 6/30/18) this could be a good way to lower the year-end fund balance and maximize the investment earnings on these reserves while using the investment earnings to help students attend the university.

Committee Recommendation:

Informational only at this time, no action required. If desired, a specific proposal will be brought to the July Board meeting for action.

Western Oregon University
Quarterly Management Report

(Unaudited, non-GAAP, For management purposes only)

As of February 28, 2018
For the Fiscal Year Ended June 30, 2018

	Year-to-Date				Notes	Budget		Projections			Note
	YTD Actual	YTD as a % of Projected	Prior YTD as % of PY Actual	% Chg Current/ Prior YTD		Prior Yr. Actual	Adopted Budget	Projected 6/30/2018	Variance from Adj. Budget	Chg since Prior Report	
(in thousands except enrollment)											
EDUCATION & GENERAL											
State General Fund	20,555	84%	84%	3%		23,888	24,521	24,506	(15)	(15)	3% (2)
Tuition & Resource Fees, net of Remissions	28,918	69%	69%	7%		39,328	40,026	41,967	1,942	1,942	7%
Other	2,448	54%	54%	4%		4,383	3,737	4,575	838	838	4%
Total Revenues	<u>51,921</u>	<u>73%</u>	<u>73%</u>	<u>5%</u>		<u>67,598</u>	<u>68,284</u>	<u>71,048</u>	<u>2,765</u>	<u>2,765</u>	<u>5%</u>
Personnel Services	(34,537)	62%	62%	3%		(54,471)	(57,367)	(55,983)	1,384	1,384	3%
Supplies & Services & Capital Outlay	(3,733)	51%	51%	-7%		(7,838)	(9,131)	(7,304)	1,826	1,826	-7%
Total Expenditures	<u>(38,271)</u>	<u>60%</u>	<u>60%</u>	<u>2%</u>		<u>(62,308)</u>	<u>(66,497)</u>	<u>(63,287)</u>	<u>3,210</u>	<u>3,210</u>	<u>2%</u>
Net from Operations	13,650					5,290	1,786	7,761	5,975	5,975	
Transfers In	0	n/a	53%	-100%		2,979	0	0	0	0	-100% (3)
Transfers Out	(1,617)	50%	51%	-59%		(7,749)	(3,184)	(3,238)	(54)	(54)	-58% (3)
Fund Additions/(Deductions)	0					(490)	0	0	0	0	
Change in Fund Balance	12,033					29	(1,397)	4,523	5,921	5,921	
Beginning Fund Balance	11,323					11,294	11,323	11,323	0	0	
Ending Fund Balance	<u>23,356</u>					<u>11,323</u>	<u>9,926</u>	<u>15,846</u>	<u>5,921</u>	<u>5,921</u>	40%
% Operating Revenues						<u>16.8%</u>	<u>14.5%</u>	<u>22.3%</u>			33%
Student FTE Enrollment	3,904	88%	88%	-2%		4,552	4,432	4,432	0	0	-3%
AUXILIARY ENTERPRISES											
Enrollment Fees	5,027	68%	68%	2%		7,260	7,043	7,385	342	342	2%
Sales & Services	9,317	61%	61%	4%		14,520	14,680	15,166	486	486	4%
Other	1,010	53%	53%	-3%		1,948	1,737	1,890	153	153	-3%
Total Revenues	<u>15,354</u>	<u>63%</u>	<u>63%</u>	<u>3%</u>		<u>23,728</u>	<u>23,460</u>	<u>24,440</u>	<u>981</u>	<u>981</u>	<u>3%</u>
Personnel Services	(7,035)	64%	64%	6%		(10,360)	(13,023)	(10,967)	2,056	2,056	6%
Supplies & Services & Capital Outlay	(7,989)	64%	64%	1%		(12,346)	(13,422)	(12,523)	899	899	1%
Total Expenditures	<u>(15,023)</u>	<u>64%</u>	<u>64%</u>	<u>3%</u>		<u>(22,706)</u>	<u>(26,445)</u>	<u>(23,489)</u>	<u>2,955</u>	<u>2,955</u>	<u>3%</u>
Net from Operations	330					1,022	(2,985)	951	3,936	3,936	
Transfers In	1,536	50%	28%	-49%		10,857	9,738	3,055	(6,683)	(6,683)	-72% (3)
Transfers Out	(86)	17%	28%	-97%		(10,572)	(7,128)	(508)	6,620	6,620	-95% (3)
Additions/(Deductions) to Net Assets	(1,759)					1,016	(366)	(2,633)	(2,267)	(2,267)	(4)
Change in Net Assets	21					2,323	(740)	865	1,606	1,606	
Beginning Net Assets	12,448					10,125	7,675	12,448	4,773	4,773	
Ending Net Assets	<u>12,469</u>					<u>12,448</u>	<u>6,935</u>	<u>13,313</u>	<u>6,379</u>	<u>6,379</u>	7%
						<u>52.5%</u>	<u>29.6%</u>	<u>54.5%</u>			4%

Western Oregon University
Quarterly Management Report

(Unaudited, non-GAAP, For management purposes only)

As of February 28, 2018
For the Fiscal Year Ended June 30, 2018

	Year-to-Date				Notes	Budget						
	YTD Actual	YTD as a % of Projected	Prior YTD as % of PY Actual	% Chg Current/Prior YTD		Prior Yr. Actual	Adopted Budget	Projected 6/30/2018	Variance from Adj. Budget	Chg since Prior Report	% chg Projection to PY Actual	Note
(in thousands except enrollment)												
DESIGNATED OPERATIONS, SERVICE DEPARTMENTS, CLEARING FUNDS												
Enrollment Fees	474	319%	319%	4%		142	83	149	66	66	4%	
Sales & Services	260	72%	72%	13%		321	390	362	(28)	(28)	13%	
Other	1,485	76%	76%	-21%		2,467	2,552	1,949	(603)	(603)	-21%	
Total Revenues	2,219	90%	88%	-13%		2,930	3,025	2,460	(565)	(565)	-16%	
Personnel Services	(821)	63%	63%	35%		(966)	(1,441)	(1,304)	138	138	35%	
Supplies & Services & Capital Outlay	(1,022)	75%	75%	5%		(1,296)	(1,763)	(1,356)	407	407	5%	
Total Expenditures	(1,843)	69%	70%	16%		(2,262)	(3,204)	(2,660)	545	545		
Net from Operations	376					668	(179)	(200)	(21)	(21)		
Transfers In	174	100%	7%	873%		264	52	174	122	122	-34%	(3)
Transfers Out	0	n/a	n/a	n/a		0	(3)	0	3	3	0%	(3)
Additions/(Deductions) to Net Assets	(271)					(410)	(320)	(404)	(84)	(84)		(4)
Change in Net Assets	279					523	(451)	(430)	21	21		
Beginning Net Assets	2,893					2,371	2,893	2,893	0	0	22%	
Ending Net Assets	3,172					2,893	2,443	2,463	21	21	-15%	
						98.7%	80.7%	100.1%				
Total fund balance						26,664	19,303	31,623				
Days of expenditures						112	73	129				

Notes

- (1) The budget presented for education and general fund is the Board adopted budget; the budget for auxiliary enterprises and designated operations, service departments, and clearing funds is the adjusted budget that correlates to Banner.
- (2) Projected state general fund revenues are set to \$24,506 to correlate with information received from HECC.
- (3) Transfers in and out (actuals and budgeted) are adjusted to agree to the attached transfer schedule. This removes the inflated numbers that result from transferring within funds.
- (4) Additions/deductions to unrestricted net assets (primarily depreciation) were projected using a monthly method (dividing by 8 and multiplying by 12) rather than the realization/burn method used for the other projections.

Western Oregon University
Quarterly Management Report
(Unaudited, non-GAAP, for management purposes only)
(in thousands)

As of February 28, 2018
For the Fiscal Year Ended June 30, 2018

	Year to Date Activity 2/28/2017	Year-end Actuals 6/30/2017	Realization/ Burn Rate %	Year to Date Activity 2/28/2018	Projected 6/30/2018	Adopted 2018 Budget	Variance Budget To Actual	Note
Education & General								
Student Fees	27,099	39,328	68.91%	28,918	41,967	40,026	1,942	
Government Resources & Allocations	20,031	23,888	83.85%	20,555	24,506	24,521	(15)	(2)
Gift Grants and Contracts	350	652	53.68%	224	417	608	(191)	
Other Revenue	1,995	3,731	53.47%	2,224	4,160	3,129	1,031	
Total Revenues	49,475	67,598	73.19%	51,921	71,049	68,284	2,766	
Personnel	33,605	54,471	61.69%	34,537	55,983	57,367	1,384	
Service & Supplies	3,612	7,383	48.92%	3,640	7,440	8,928	1,488	
Capital Expense	394	454	86.67%	93	108	203	95	
Total Expenses	37,610	62,308	60.36%	38,271	63,531	66,497	2,967	
Interfund Transfers In	(1,586)	(2,979)	53.24%	0	0	0	0	(3)
Interfund Transfers Out	3,938	7,749	50.81%	1,617	3,238	3,184	(54)	(3)
Total Expenses and Transfers	39,962	67,079	59.57%	39,888	66,769	69,681	2,913	
Net Revenues less Expenses	9,512	519		12,033	4,281	(1,397)		
Additions/Deductions to Fund Balance		(490)			0			
Fund Balance at the Beginning of the Year		11,294			11,323			
Fund Balance at the End of the Year		11,323			15,604			
Fund Balance as a Percentage of Revenues		16.75%			21.96%			
Auxiliary Enterprises								
Enrollment Fees	4,942	7,260	68.07%	5,027	7,385	7,043	342	
Sales and Services	8,920	14,520	61.43%	9,317	15,166	14,680	486	
Other Revenue	1,041	1,948	53.43%	1,010	1,890	1,737	153	
Total Revenues	14,903	23,728	62.81%	15,354	24,440	23,460	981	
Personnel	6,645	10,360	64.15%	7,035	10,967	13,023	(2,056)	
Service & Supplies & Capital Expense	7,876	12,346	63.79%	7,989	12,523	13,422	(899)	
Total Expenses	14,521	22,706	63.95%	15,023	23,489	26,445	2,955	
Interfund Transfers In	(2,995)	(10,857)	27.59%	(1,536)	(3,055)	(9,738)	(6,683)	(3)
Interfund Transfers Out	2,966	10,572	28.05%	86	508	7,128	6,620	(3)
Total Expenses and Transfers	14,492	22,421	64.63%	13,573	20,942	23,835	2,892	
Net Revenues less Expenses	411	1,307		1,781	3,498	(375)		
Additions/Deductions to Fund Balance		1,016			(2,633)			(4)
Fund Balance at the Beginning of the Year		10,125			12,448			
Fund Balance at the End of the Year		12,448			13,313			
Fund Balance as a Percentage of Revenues		52.46%			54.47%			

Western Oregon University
Quarterly Management Report
(Unaudited, non-GAAP, for management purposes only)
(in thousands)

As of February 28, 2018
For the Fiscal Year Ended June 30, 2018

	Year to Date Activity 2/28/2017	Year-end Actuals 6/30/2017	Realization/ Burn Rate %	Year to Date Activity 2/28/2018	Projected 6/30/2018	Adopted 2018 Budget	Variance Budget To Actual	Note
Designated Operations, Service Departments, Clearing Funds								
Enrollment Fees	454	142	318.90%	474	149	83	66	
Sales and Services	230	321	71.72%	260	362	390	(28)	
Other Revenue	1,880	2,467	76.21%	1,485	1,949	2,552	(603)	
Total Revenues	2,564	2,930	87.52%	2,219	2,460	3,025	(565)	
Personnel	608	966	62.96%	821	1,304	1,441	138	
Service & Supplies & Capital Expense	977	1,296	75.38%	1,022	1,356	1,763	(407)	
Total Expenses	1,585	2,262	70.07%	1,843	2,660	3,204	545	
Interfund Transfers In	(18)	(264)	6.76%	(174)	(174)	(52)	(122)	(3)
Interfund Transfers Out	0	0	100.00%	0	0	3	(3)	(3)
Total Expenses and Transfers	1,567	1,998	78.45%	1,669	2,486	3,156	670	
Net Revenues less Expenses	997	933		550	(26)	(131)		
Additions/Deductions to Fund Balance		(410)			(404)			(4)
Fund Balance at the Beginning of the Year		2,371			2,893			
Fund Balance at the End of the Year		2,893			2,463			
Fund Balance as a Percentage of Revenues		98.73%			100.15%			

Notes

- (1) The budget presented for education and general fund is the Board adopted budget; the budget for auxiliary enterprises and designated operations, service departments, and clearing funds is the adjusted budget that correlates to Banner.
- (2) Projected state general fund revenues are set to \$24,506 to correlate with information received from HECC.
- (3) Transfers in and out (actuals and budgeted) are adjusted to agree to the attached transfer schedule. This removes the inflated numbers that result from transferring within funds.
- (4) Additions/deductions to unrestricted net assets (primarily depreciation) were projected using a monthly method (dividing by 8 and multiplying by 12) rather than the realization/burn method used for the other projections.

Western Oregon University
Transfers Schedule - Projected
As of February 28, 2018
For the Fiscal Year Ended June 30, 2018
(Unaudited, non-GAAP, for management purposes only)

	E&G			Auxiliary			Des Ops - Serv Dept.	Grants	Plant fund		Restricted funds	Total
	(a)	(b)	(c)	(a)	(b)	(c)			(d)	(e)		
<u>Transfers In E&G</u>												-
<u>Transfers Out E&G</u>				(a)	(b)	(c)			(d)	(e)	(f)	
				1,451,233	1,432,906	85,752			111,557	102,214	54,330	3,237,992
<u>Transfers In AUX</u>	(a)	(b)	(c)						(g)			
	1,451,233	1,432,906	85,752						85,000			3,054,891
<u>Transfers Out AUX</u>							(h)		(i)			
							86,000		421,652			507,652
<u>Transfers In DO, SD</u>					(h)			(j)				
					86,000			87,863				173,863
<u>Transfers Out DO, SD</u>												-

Type	Description
(a) Actual	Year to date Athletic operations support
(b) Budgeted	Athletic operations support - Staff/Coach salaries and OPE
(c) Budgeted	Transfer out of funds to support Conference Services program staff
(d) Actual	Year to date transfer out of funds to SELP
(e) Budgeted	Transfer out of funds to SELP debt service fund for payment
(f) Actual	To cover negative cash balance and true up cost allowance for SEOG
(g) Actual	Transfer in from reserves to cover lights and linen purchases for residence halls
(h) Actual	Auxiliary funded scholarships
(i) Budgeted	Fund building & equipment replacement reserves for Housing, Dining, Parking, Health & Wellness Center, and the Werner University Center
(j) Actual	Funds transferred from closing grants

WOU Board of Trustees Finance and Administration Committee

April 5, 2018



Western Oregon
UNIVERSITY

New & Currently Scheduled Capital Projects

- Natural Sciences Remodel \$8,700,000
- ITC Phase 3 \$6,000,000
- OMA \$8,200,000
- ~~Student Advising \$241,000~~ **COMPLETE**



Capital Project Priority List 2019 – 2025 Biennia

1. Old Education Building.	\$15 Million
2. New (ish) Physical Ed.	\$15 Million
3. Health Sciences Building	\$20 Million
4. APSC	\$10 Million
5. Rice Auditorium	\$10 Million
6. McArthur Stadium	\$10 Million
7. Aux. Serv. Valsetz Dining Hall	\$3.5 Million

TOTAL: \$83.5 Million

TOTAL DM Offset: 24%



WOU Capital Project Request List 2019 - 2021



1. Old Education Renovation / Replacement

- **Built in 1965**
- **35,000 sq. ft.**
- **Reinforced Concrete & Masonry**

Needs:

1. HVAC Modernization for control and energy efficiency.
2. Seismic Upgrades.
3. Asbestos Abatement.
4. Reconfigure and Insulate to modern specifications.
5. Elevator Modification for controls.
6. Sprinkler System.

Deferred Maintenance Offset: \$875,000 (2% of Total Campus DM)

Approximate Cost: \$15 Million to Demo and replace

State Paid: \$12 Million & Institutional/Donor Paid: \$3 Million



2. New Physical Education Building



2. New Physical Education Building

- Built in 1971
- 62,000 sq. ft.
- Reinforced concrete

Needs:

1. Need 2 additional locker rooms 3 more is ideal but you only need 4 to host tournaments.
2. Move Weight room from out under stadium (All student athletes).
3. Training room expanded. Need private spaces for both Men and Women.
4. Add more classroom space and Offices. Plus renovate existing.
5. Storage spaces.
6. HVAC
7. ADA elevator and bathroom.
8. New flooring in “rubber room”.
9. New Seating w/ Seat backs on both sides.
10. Replace all gym floors.
11. All Campus Classrooms.

Deferred Maintenance Offset: \$3,720,000 (10% of Total Campus DM)

Approximate Cost: \$15 Million

State Paid: \$12 Million & Institutional/Donor Paid: \$3 Million



3. Health Sciences Building

- **New construction**
- **40,000 sq. ft.**
- **TBD**

Needs:

1. Home for Physical Therapy program.
2. Home for Graduate studies for Health Science.
3. Classrooms, Offices.
4. Labs.
5. Physical Therapy Rooms.



(Weyerhaeuser Center for Health Sciences @ Puget Sound University)

Deferred Maintenance Offset: N/A

Approximate Cost: \$20 Million

State Paid: \$15 Million & Institutional/Donor Paid: \$5 Million



4. Academic Programs and Support Center

- Built in 1955 & Remodeled 1966
- 44,000 sq. ft.
- Reinforced Concrete

Needs:

1. HVAC upgrades (very challenging due to building design).
2. Seismic Upgrade.
3. Re-Roof.
4. Replace glass Exterior Windows and Doors.
5. Electrical Upgrade.
6. Plumbing Upgrade.
7. Sprinkler System Improvements.



**Deferred Maintenance Offset: \$3,080,000 (8% of Total Campus DM) Approximate
Cost: \$10 Million for Remodel
State Paid: \$10 Million & Institutional/Donor Paid: \$0**



5. Rice Auditorium

- Built in 1974
- 27,667 sq. ft.
- Commercial construction Steel & Concrete

Needs:

1. HVAC upgrades.
2. ADA Upgrades.
3. Replace glass Exterior Windows and Doors.
4. Electrical Upgrade.
5. Plumbing Upgrade.
6. Second floor Balcony.
7. Elevator.
8. Construction shop addition for stage sets and props.



Deferred Maintenance Offset: \$830,000 (2% of Total Campus DM)

Approximate Cost: \$10 Million for Remodel

State Paid: \$8 Million & Institutional/Donor Paid: \$2 Million



6. McArthur Stadium

- Built in 1980
- 11,000 sq. ft.
- Reinforced Concrete

Needs:

1. Add Elevator.
2. Remodel Press/Coaches Boxes.
3. Electrical Upgrades.
4. Install Field Turf to accommodate soccer and football.
5. Re-surface track and relocate one long jump area.
6. Replace Stadium lights in order to have evening events.
7. Restroom and concessions remodels.



Deferred Maintenance Offset: \$330,000 (Less than 1% of Total Campus DM)

Approximate Cost: \$10 Million for Remodel

State Paid: \$5 Million & Institutional/Donor Paid: \$5 Million



7. Auxiliary Services / Valsetz Dining Hall

- Built in 1969
- Remodeled in 1997
- 22,771 sq. ft.
- Reinforced Concrete

Needs:

1. Update and Expand Kitchen Areas
2. Create “Concept” areas for types of meals
3. Expand Convenience Store
4. Replace old kitchen equipment.
5. Remodel Conference Rooms.
6. Electrical upgrades.
7. Food storage area upgrades (Freezers & Refrigerators).



Deferred Maintenance Offset: \$500,000 (Less than 1.5% of Total Campus DM)
Approximate Cost: \$3.5 Million for Remodel
Institutional/Donor Paid: \$3.5 Million



Thank you.

Questions?

Comments?



**Western Oregon University
Six Year Capital Plan
Prepared: February 2018**

	Priority Ranking	State Paid Bonds 1:1 Match Req'd Article XI-G	State Paid Bonds Article XI-Q	Institutionally Paid Bonds Article XI-F	Other Funds Donations or University (Non-GF) Amounts	Total
<u>E&G Projects</u>						
Old Education Replacement/Student Success	1	\$2,000,000	\$10,000,000	\$0	\$3,000,000	\$15,000,000
New Physical Education - Expansion/Renovation	2	\$3,000,000	\$9,000,000	\$0	\$3,000,000	\$15,000,000
Physical Therapy/Exercise Science	3	\$5,000,000	\$10,000,000	\$2,000,000	\$3,000,000	\$20,000,000
Academic Programs and Support Center	4	\$0	\$10,000,000	\$0	\$0	\$10,000,000
Rice Auditorium Renovation/Modernization	5	\$2,000,000	\$6,000,000	\$0	\$2,000,000	\$10,000,000
McArthur Stadium Upgrade	6	<u>\$5,000,000</u>	<u>\$0</u>	<u>\$2,000,000</u>	<u>\$3,000,000</u>	<u>\$10,000,000</u>
Totals		\$17,000,000	\$45,000,000	\$4,000,000	\$14,000,000	\$80,000,000
<u>Auxiliary Projects</u>						
Valsetz Food Service Expansion/Renovation	1	<u>\$0</u>	<u>\$0</u>	<u>\$3,500,000</u>	<u>\$0</u>	<u>\$3,500,000</u>
Institution Total		\$17,000,000	\$45,000,000	\$7,500,000	\$14,000,000	\$83,500,000

2017-18 Tuition and Mandatory Fee Comparisons
All Amounts per Academic Term

Institution	Tuition Only				Mandatory Fees					Total Fees
	Resident UG 15 cr.	Resident Grad 12 cr.	UG 15 cr.	Grad 12 cr.	Building	Health	Incidental	Rec.	Other	
WOU - Non-Promise	\$2,480.00	\$4,788.00	\$7,965.00	\$8,052.00	\$45.00	\$139.00	\$349.00	\$42.00	\$11.00	\$586.00
WOU - Promise	\$2,900.00									
EOU	\$2,309.25	\$4,170.00	\$6,082.50	\$5,256.00	\$45.00	\$150.00	\$255.00	\$0.00	\$28.00	\$478.00
OIT	\$2,640.15	\$4,975.68	\$8,403.60	\$8,352.60	\$45.00	\$150.00	\$345.00	\$0.00	\$0.00	\$540.00
SOU	\$2,475.60	\$5,052.00	\$7,590.00	\$6,324.00	\$45.00	\$137.00	\$343.00	\$95.00	\$0.00	\$620.00
OSU - Corvallis	\$3,025.00	\$4,113.00	\$9,245.00	\$7,587.00	\$45.00	\$153.72	\$375.18	\$0.00	\$0.00	\$573.90
OSU - Cascades	\$2,920.00	\$4,113.00	\$9,245.00	\$7,587.00	\$45.00	\$0.00	\$293.00	\$0.00	\$0.00	\$338.00
PSU	\$2,467.50	\$4,812.00	\$8,250.00	\$7,260.00	\$37.00	\$141.00	\$238.00	\$44.00	\$0.00	\$460.00
UO	\$3,165.00	\$4,842.00	\$10,845.00	\$7,260.00	\$45.00	\$191.00	\$238.50	\$62.50	\$155.00	\$692.00
PCC	\$1,560.00	n/a	\$3,540.00	n/a	\$0.00	\$0.00	\$114.75	\$0.00	\$23.00	\$137.75
Chemeketa CC	\$1,260.00	n/a	\$3,690.00	n/a	\$0.00	\$0.00	\$0.00	\$0.00	\$225.00	\$225.00

**Western Oregon University
2018-19 Tuition Recommendation**

<u>Description</u>	<u>Current Rate Per Credit</u>	<u>% Increase Proposed</u>	<u>Proposed Rate Per Credit</u>	<u>Full-time Diff. per Year</u>	<u>Full-time Diff. per Year</u>
Resident UG - Basic	\$165.00	4.25% *	\$172.00	\$315.00 45 cr./yr.	
Resident UG - Promise	\$193.00	2.00%	\$197.00	\$180.00 45 cr./yr.	
WUE - Basic	\$247.50	4.25% *	\$258.00	\$472.50 45 cr./yr.	
WUE - Promise	\$289.50	2.00%	\$295.50	\$270.00 45 cr./yr.	
Non-Res. UG	\$531.00	3.00%	\$547.00	\$720.00 45 cr./yr.	
Resident Grad	\$399.00	3.00%	\$411.00	\$432.00 36 cr./yr.	\$324.00 27 cr./yr.
Non-Resident Grad	\$671.00	0.00%	\$671.00	\$0.00 36 cr./yr.	\$0.00 27 cr./yr.
On-line: UG	\$219.00	3.00%	\$226.00	\$315.00 45 cr./yr.	
Grad	\$479.00	3.00%	\$493.00	\$504.00 36 cr./yr.	\$378.00 27 cr./yr.
Other: MA Interpreting Studies	\$519.00	0.00%	\$519.00	\$0.00 36 cr./yr.	\$0.00 27 cr./yr.

Rounded to whole dollars

* To be accompanied by an increase in need based fee remissions by \$400,000/yr.

Note: Subject to Board of Trustees approval on April 18, 2018



Western Oregon
UNIVERSITY

**2018-19 Academic Year
&
2019 Summer Session
Fee Book**

Approved by the Western Oregon University Board of Trustees at the April __, 2018 meeting. All prior OUS/WOU Academic Year and Summer Session Fee Books are repealed except as to rights obligations previously acquired or incurred there under.

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To access the 2018-19 Fee Book information online, visit the following WOU web page:
<http://www.wou.edu/business/services/fee-bookbudget-summary/>

INTRODUCTION

The Western Oregon University (WOU) 2018-19 Fee Book, adopted by the Western Oregon University Board of Trustees (Board) contains policy statements and delegation of authority for a variety of WOU policies and fees and is published for public informational purposes.

DELEGATION OF AUTHORITY

With the passage of Senate Bill (SB) 270 (2013) and effective July 1, 2015, Western Oregon University will set their tuition and fee rates under the governance of their own institutional board.

The Board annually sets fees for enrollment at WOU, including:

- Tuition
- Building Fees
- Health Service Fees
- Incidental Fees
- Student Recreation Center Fees
- Other Mandatory Enrollment Fees
- Other Special Fees as determined by the Board

The Board has delegated authority to the institution president to establish certain fees, fines, and charges for services and materials, including:

- Laboratory and Course fees
- Fees for workshops
- Instruction fees for Continuing Education, Extended Programs, and Distance Education
- Residence Hall Room and Board Rates
- Charges for auxiliary services, e.g., food services, student centers, and parking
- Fines for violation of campus regulations
- Charges for facilities use
- Charges for other materials and services

The schedule of charges is on file in the WOU business office. Income from such services must be reflected in the WOU budget.

SUMMARY OF CHANGES

The following narratives summarize tuition and fee changes for 2018-19, focusing on resident tuition and fees. This Fee Book incorporates Summer Session rates with Academic Year rates. The Summary of Changes will only address Summer Session tuition rates when they vary from the Academic Year rates and Summer Session fee rates if they exceed Academic Year rates.

As part of the implementation of Senate Bill 242, passed in June 2011, each institution is required to establish a process which integrated student participation in the tuition-setting process in accordance with Board established guidelines (see page 28). All institutions noted compliance with these guidelines with most establishing separate Tuition Advisory Committees. Universities continue to develop and refine their respective processes.

As per ORS 351.063, as amended by SB 270 (2013), the Board may not increase the total amount of enrollment fees paid by undergraduate resident students by more than five percent annually unless the Board first receives approval from the Higher Education Coordinating Commission (HECC) or the Legislative Assembly.

WOU

Base tuition increases over 2017-18 rates:

Undergraduate resident: Base: 4.25% (\$7/credit)*

Undergraduate resident: 2018 Promise: 2.00% (\$4/credit)*

Undergraduate nonresident: 3.00% (\$16/credit)

Undergraduate Distance Education / Off Campus / Online Course Tuition and Fees: 3.20% (\$7/credit)

Graduate resident: 3.00% (\$12/credit)

Graduate nonresident: 0.00% (\$0/credit)

Graduate Distance Education / Off Campus / Online Course Tuition and Fees: 2.92% (\$14/credit)

Graduate Master of Arts in Interpreting Studies program: 0.00% (\$0/credit)

WOU continues to offer to incoming resident undergraduate freshmen and transfer students a one-time choice between WOU's base tuition rate and the WOU's fixed four-year tuition rate (WOU Promise). The base rate reflects a 4.25% increase over the 2017-18 base rate. The fixed rate Promise reflects a 2.00% increase over 2017 Promise rate. Students electing the Promise rate option will not be subject to increases for a four-year period.

As approved by student government, WOU Incidental Fees will increase by 4.01% (\$14 per term) and Health Center Fees by 1.44% (\$2 per term) for the academic year. Summer term Incidental fee is increasing from the previous summer term rate by 9.15% (\$14 per term). Summer term Health Center Fee is consistent with academic year term.

WOU is also offering the WUE rates to Undergraduate Students from Texas.

* \$5 front load fee on first credit was eliminated

TUITION & FEE SUMMARY TABLES

The following tables provide sample calculations and comparative information for base tuition and fees for fulltime attendance for WOU.

WOU also provides an online tuition calculator for estimating cost of attendance. That online tuition calculator is available here: www.wou.edu/admin/business/tuitioncalc/

Academic Year Tuition and Fee Calculation & Changes

The tables below compare full time (15 credits undergraduate) tuition and fees per term for 2018-19 academic year with 2017-18 for resident and nonresident students.

Table 1 provides a comparison of the Total Tuition & Fees for Residents while Table 2 includes the same comparison data for nonresidents.

<u>Table 1</u>			
2018-19 AY Tuition & Fees - per term			
Undergraduate Resident			
Resident	Credit Load		
	15 Credits		
<u>Tuition</u>	\$ chg over		
	Spring 2018	% chg	
Resident -Base/Traditional	\$2,580	\$100	4.0%
Resident - Promise 2018	\$2,955	\$55	1.9%
<u>Fees</u>			
Building	\$45	\$0	0.0%
Incidental	\$363	\$14	4.0%
Rec Center Building	\$42	\$0	0.0%
Health & Counseling Building	\$11	\$0	0.0%
Health Center	\$141	\$2	1.4%
Total Fees	\$602	\$16	2.7%
<u>Total Tuition & Fees</u>			
Resident -Base/Traditional	\$3,182	\$116	3.8%
Resident - Promise 2018	\$3,557	\$71	2.0%

<u>Table 2</u>			
2018-19 AY Tuition & Fees - per term			
Undergraduate Non-Resident			
Non-Resident	Credit Load		
	15 Credits		
<u>Tuition</u>	\$ chg over		
	Spring 2018	% chg	
Non-Resident	\$8,205	\$240	3.0%
<u>Fees</u>			
Building	\$45	\$0	0.0%
Incidental	\$363	\$14	4.0%
Rec Center Building	\$42	\$0	0.0%
Health & Counseling Building	\$11	\$0	0.0%
Health Center	\$141	\$2	1.4%
Total Fees	\$602	\$16	2.7%
<u>Total Tuition & Fees</u>			
Non- Resident	\$8,807	\$256	3.0%

The tables below compare full time (12 credits) Graduate tuition and fees per term for 2017-18 academic year with 2016-17 for resident and nonresident students.

Table 3 provides a comparison of the Total Tuition & Fees for Residents while Table 4 includes the same comparison data for nonresidents.

<u>Table 3</u>			
2018-19 AY Tuition & Fees - per term			
Graduate Resident			
Resident	Credit Load		
	12 Credits		
<u>Tuition</u>	\$ chg over		
	Spring 2018	% chg	
Resident	\$4,932	\$144	3.0%
<u>Fees</u>			
Building	\$45	\$0	0.0%
Incidental	\$363	\$14	4.0%
Rec Center Building	\$42	\$0	0.0%
Health & Counseling Building	\$11	\$0	0.0%
Health Center	\$141	\$2	1.4%
Total Fees	\$602	\$16	2.7%
<u>Total Tuition & Fees</u>			
Resident	\$5,534	\$160	3.0%
<u>Table 4</u>			
2018-19 AY Tuition & Fees - per term			
Graduate Non-Resident			
Non-Resident	Credit Load		
	12 Credits		
<u>Tuition</u>	\$ chg over		
	Spring 2018	% chg	
Non-Resident	\$8,052	\$0	0.0%
<u>Fees</u>			
Building	\$45	\$0	0.0%
Incidental	\$363	\$14	4.0%
Rec Center Building	\$42	\$0	0.0%
Health & Counseling Building	\$11	\$0	0.0%
Health Center	\$141	\$2	1.4%
Total Fees	\$602	\$16	2.7%
<u>Total Tuition & Fees</u>			
Non-Resident	\$8,654	\$16	0.2%

Summer Session Tuition and Fee Calculation & Changes

The tables below compare full time (12 credits undergraduate tuition and fees per term for 2019 Summer Session with the prior Summer Session 2018 for resident and non-resident.

Table 5 provides a comparison of the Total Tuition & Fees for Resident students while Table 6 illustrates the breakdown for nonresidents.

<u>Table 5</u>			
Summer 2019 Tuition & Fees - per term			
Undergraduate Resident			
Resident	Credit Load		
	12 Credits		
<u>Tuition</u>	\$ chg over		
	Summer 2018	% chg	
Resident -Base/Traditional	\$2,064	\$79	4.0%
Resident - Promise 2018	\$2,364	\$43	1.9%
<u>Fees</u>			
Building	\$34	\$0	0.0%
Incidental	\$167	\$14	9.2%
Rec Center Building	\$35	\$0	0.0%
Health & Counseling Building	\$11	\$0	0.0%
Health Center	\$141	\$2	1.4%
Total Fees	\$388	\$16	4.3%
<u>Total Tuition & Fees</u>			
Resident -Base/Traditional	\$2,452	\$95	4.0%
Resident - Promise 2018	\$2,752	\$59	2.2%
<u>Table 6</u>			
Summer 2019 Tuition & Fees - per term			
Undergraduate Non-Resident			
Non-Resident	Credit Load		
	12 Credits		
<u>Tuition</u>	\$ chg over		
	Summer 2018	% chg	
Non-Resident	\$6,564	\$192	3.0%
<u>Fees</u>			
Building	\$34	\$0	0.0%
Incidental	\$167	\$14	9.2%
Rec Center Building	\$35	\$0	0.0%
Health & Counseling Building	\$11	\$0	0.0%
Health Center	\$141	\$2	1.4%
Total Fees	\$388	\$16	4.3%
<u>Total Tuition & Fees</u>			
Non-Resident	\$6,952	\$208	3.1%

The tables below compare full time (9 credits) Graduate tuition and fees per term for 2019 Summer Session with 2018 Summer session for resident and nonresident students.

Table 7 provides a comparison of the Total Tuition & Fees for resident students while Table 8 illustrates the breakdown for nonresident students.

<u>Table 7</u>				
Summer 2019 Tuition & Fees - per term				
Graduate Resident				
Resident	Credit Load			
	9 Credits			
<u>Tuition</u>			\$ chg over Summer 2018	% chg
Resident	\$3,699	\$3,591	\$108	3.0%
<u>Fees</u>				
Building	\$34	\$34	\$0	0.0%
Incidental	\$167	\$153	\$14	9.2%
Rec Center Building	\$35	\$35	\$0	0.0%
Health & Counseling Building	\$11	\$11	\$0	0.0%
Health Center	\$141	\$139	\$2	1.4%
Total Fees	\$388	\$372	\$16	4.3%
<u>Total Tuition & Fees</u>				
Resident	\$4,087	\$3,963	\$124	3.1%
<u>Table 8</u>				
Summer 2019 Tuition & Fees - per term				
Graduate Non-Resident				
Non-Resident	Credit Load			
	9 Credits			
<u>Tuition</u>			\$ chg over Summer 2018	% chg
Non-Resident	\$6,039	\$6,039	\$0	0.0%
<u>Fees</u>				
Building	\$34	\$34	\$0	0.0%
Incidental	\$167	\$153	\$14	9.2%
Rec Center Building	\$35	\$35	\$0	0.0%
Health & Counseling Building	\$11	\$11	\$0	0.0%
Health Center	\$141	\$139	\$2	1.4%
Total Fees	\$388	\$372	\$16	4.3%
<u>Total Tuition & Fees</u>				
Non-Resident	\$6,427	\$6,411	\$16	0.2%

Tuition and Fee Policies for 2018-19

Tuition Structure and Assessment

Tuition rates for students admitted to academic programs are established via student classification (undergraduate, graduate, and doctoral), residency, and credit hours taken. Tuition revenue supports all facets of the University operations including the instructional and administrative costs of WOU and varies based on factors including class sizes, faculty salaries, specialized programs and equipment as well as facilities required to teach courses. Part-time students enrolling for a combination of undergraduate and graduate courses are assessed tuition using the rates for each respective classification and fees based on the undergraduate fee tables for total enrolled credits. Nonresident students pay a larger share of instructional costs than resident students when the market allows and, on average, cover the full cost of instruction. Nonresident rates should be competitive with those charged at peer institutions and be sensitive to the institutional nonresident enrollment trends and objectives.

There are three basic tuition and fee structures at WOU: the regular academic year, summer session, and continuing education/on-line programs. Under existing policy, each of the three tuition structures is separate, with its own unique rate setting process.

Academic Year:

- Charges assessed to students during the academic year are comprised of Tuition, Mandatory Enrollment Fees, One-time Fees, and Other Student Fees. The revenue generated by each component is dedicated to a specific purpose, independent of the other components. Enrollments during the academic year are usually referred to as “in-load” enrollments.

Summer Session:

- As with the academic year, tuition supports the direct instruction and administrative costs of each institution’s summer session programs. For summer session programs, tuition is aligned to the preceding academic year’s structure.

Continuing Education/On-Line:

- Continuing Education, Extended Programs, and most Distance Education courses fall within the category previously referred to as self-support. Continuing Education/On-Line courses are offered through special campus programs not generally available during the academic year or summer session. Tuition and fees for Continuing Education are assessed regardless of residency or course load. Rates are set at levels necessary to cover (at a minimum) the direct costs of providing the course plus an indirect cost recovery for administrative overhead costs. Tuition and fees are charged to participating students apart from enrollment fees paid for other courses. Matriculation fee is assessed when appropriate.

Student Residency

A resident student is one who fulfills Oregon residency requirements. Oregon residency is generally based on the following criteria: a person with a bona fide fixed and permanent physical presence established and maintained in Oregon of not less than 12 consecutive months immediately prior to the term for which residence status is requested. State funded graduate students who become Graduate Teaching or Research Assistants are automatically converted to resident status for fee purposes.

A nonresident student is one who does not meet Oregon residency requirements.

Fees

Fees fall into three distinct categories: Mandatory Enrollment Fees, One-time Fees, and Other Student Fees. At WOU, academic or administrative units begin the process for requesting a new fee or revising an existing fee by preparing a fee proposal and submitting it to the University administration for review and approval.

The fee requests must include information regarding the academic unit initiating the fee, fee designation or name, justification of need, amount, estimated revenues and expenditures, and expected implementation date. All fee proposals are thoroughly reviewed by University administration before being approved.

1. Mandatory Enrollment Fees

Mandatory enrollment fees include the Building, Health Service, Incidental, Recreation Center and Student Health Building Fees. Students enrolled under the part-time student fee policy are subject to these fees at a rate appropriate to the specific number of credit hours taken each term. Institutions have the option of assessing mandatory enrollment fees during the summer session at rates comparable to those assessed in the academic year.

Building Fee:

- The Building Fee is the same for all institutions. This fee is established by legislative statute ORS 351.170 and allows the universities to assess up to \$45 per student per term to finance debt service for construction associated with student centers, health centers, and recreational facilities constructed through the issuance of Article XI-F(1) bonds. The fee charge for summer session is approximately 75% percent of the academic year rate. For summer, the rate is \$34 per student. A pro rata fee is assessed on part-time students.

Incidental Fee:

- Incidental fee recommendations are made by the student incidental fee committee on campus. In some instances, the student committee recommendations are supported by general campus student referenda. Funds generated by incidental fees are used to fund student union operations, educational, cultural, and student government activities, and athletics. *Statutory Authority: ORS 351.070 (3)(d)*

The president of each institution reviews the student committee recommendation for establishing incidental fees for the subsequent year. Once approved, WOU President submits recommendation to the WOU Board of Trustees. Generally, there are fewer incidental fee supported activities during the summer term, resulting in lower rates than those assessed during the academic year.

Health Services Fee:

- This fee is used to support the institution's student health services, which are operated as an auxiliary enterprise on a self-sustaining basis.

Recreation Center and Student Health Building Fees:

- The Recreation Center and Student Health Building Fee is used to fund the construction and debt service of these student centers as the mandatory Building Fee assessed per term is not adequate to fund or operate projects of this scale.

2. One-time Fees

The Matriculation fee is an example of one-time fee charges to new or transfer students. These fees are one-time assessments and were developed to reduce the large number of enrollment-related fees for student orientation. The fees are also used to support academic programming for freshman interest groups and learning.

3. Other Student Fees

Fees for Instruction Related Services:

- Laboratory and Course Fees must be published in the institution's catalogue and/or time schedule of classes. Laboratory and Course Fees are limited to institutional sale to students of equipment, materials, or ancillary services consumed by the student as a part of course instruction where the equipment or material is not readily available for purchase through the bookstore or other external source.

Approval will not be given for Laboratory and Course Fees that constitute a charge for the use of institution owned equipment, specimens, software licenses, or other microcomputer application charges for goods or services, or other materials and supplies consumed in the instruction process, except for certain non-required physical education courses that involve use of non-state-owned facilities or expensive equipment.

Fees and Fines for Non-Instruction Related Services and Materials:

- The Board requires that the level of charges be sufficient to ensure recovery of the cost of providing the services and materials as well as to recover the indirect costs associated with these activities. These include charges for auxiliary services, e.g., housing, food services, student centers, parking, and bookstores; charges for facilities use; etc. Institutions also set the level of fines for violation of campus regulations, such as late fines for library books, parking fines, etc.

Application Fee

- Each institution may determine the amount of the application fee (up to \$100.00) and establish policies governing the conditions under which application fees will be required. Institutions may assess additional application fees for admission to selected programs or schools within their institution. In instances where an application is received without the Application Fee, request will be made for the Application Fee, and the fee must be received before the application will be evaluated. Application Fees are not refundable.

Application Fee Deferral Program

- Institutional executives may, upon request, defer the Application Fee for first-time freshmen or transfer students who, at the time of application, are either eligible for or participate in any of the following:
 - 1) Free or reduced school lunch program;
 - 2) TRIO-type college preparatory programs (e.g., Upward Bound, Talent Search, EOC, HEP);
 - 3) State of Oregon or U.S. public assistance; and/or
 - 4) College Board fee waiver
 - 5) Foster Youth Tuition and Fee Waiver

To request an online application for Application Fee deferral, go to the following web address located at: <http://www.wou.edu/admissions/files/2015/11/2015-16-Fee-Deferral1.pdf>. The student must complete the deferral form and

have it signed by a school official (high school counselor), special program official, or University official, and submit it at the time of application. Application fees deferred under this provision become payable upon the student's enrollment and receipt of financial aid funds. If a student does not complete the application process or does not enroll, the Application Fee is canceled. Students residing outside the United States at the time of their application must prove to the satisfaction of institutional officials that they would meet comparable eligibility guidelines in their country of residence.

Post baccalaureate, Non-graduate Student Classification

A holder of an accredited baccalaureate degree who has not been admitted to a graduate degree program and who submits an official application for admission to pursue a second baccalaureate degree or enroll in course work not to be used for graduate credit is called a *post baccalaureate, non-graduate student* and is assessed tuition at undergraduate rates.

Baccalaureate degree holders who are admitted to post baccalaureate, non-graduate status at undergraduate tuition rates are precluded from claiming graduate credits for graduate courses taken while in this status. However, individual institutions may allow the reservation of not more than six of their graduate credits per term to apply in their institution's graduate programs. Graduate credits reserved in combination as an undergraduate and post baccalaureate, non-graduate cannot exceed 15 credits. Baccalaureate degree holders who are not admitted to post baccalaureate, non-graduate status will be assessed graduate tuition rates.

Students who are admitted to an advanced degree program may convert to post baccalaureate, non-graduate student status only if the graduate degree has been awarded, if a student has been dropped from the degree program by the institution, or upon a request approved by the dean of the Graduate School for voluntary relinquishment of graduate status.

Students in the education programs who are admitted to the 45-hour standard norm certificate program are not eligible for the post baccalaureate, non-graduate student status. Graduate tuition rates are applicable whether or not students in the program seek graduate credit.

Reduced Tuition Policies

WOU's commitment to 40-40-20 is achieved through an array of innovative reduced tuition programs and policies. These programs and policies promote the goals of providing accessibility to higher education by assuring college is affordable and relevant to the realities of today's student population.

Approved Programmatic Student Fee Remission Programs

Student fee remission programs are funded through institutional resources. Western Oregon University's student financial aid offerings are comprised of programs similar to others offered across the country (often referred to as "fee waivers", "tuition discounts" or "tuition remissions") enhanced by innovative initiatives specific to the state of Oregon or Western Oregon University. The objective of programmatic student aid fee remission programs is to provide financial incentives for certain student groups to enroll. As an enrollment management tool, programmatic student fee remission programs allow an institution to target specific campus enrollment goals including recruitment of needy or meritorious students, international students, athletes, and other student populations.

The following are summaries of WOU's programmatic student fee remission programs:

Diversity Programs

a. WOU Educational Diversity Initiative

Criteria: This program is open to all students, resident or nonresident, undergraduate or graduate.

The program may consider different factors in making awards and may offer one or more tuition and fee remission programs as long as it maintains its commitment to diversity. Under these guidelines, campuses may consider different factors in support of their educational mission.

Awards: Awards may make partial or full waivers based on need or to expand the number of students who receive at least some funding support. Awards are not transferable.

International Cultural Service Program

a. International Fee Remission Program

Criteria: This program is for undergraduate or graduate students with foreign student status.

Awards: Awards may vary in amount.

b. Cultural Service Program

Criteria: This program is for undergraduate or graduate students with foreign student status who are competitively selected on the basis of academically meritorious achievement; and fulfill the community service requirements of the program while receiving the award.

Awards: Awards may vary in amount.

International Exchanges

a. International Oregon Public University Exchange Program

Criteria: This program is for students who are attending an Oregon public university as a part of an approved state-wide exchange program.

Awards: Awards may consist of remission of all or some of the Enrollment Fees, depending upon the reciprocal agreement under which the student is enrolled.

b. International Institution Exchange Program

Criteria: This program is for students who are attending WOU as a part of an-approved institution exchange program.

Awards: Awards may consist of remission of all or some of the Enrollment Fees, depending upon the reciprocal agreement under which the student is enrolled.

Contract and Grant

Criteria: This provision is for students who participate in specific courses or programs during the academic year funded by grant or contract with an outside agency or firm.

Awards: Awards are generally for remission of Tuition only, depending upon agreement with the granting agency.

WOU Supplemental Tuition Grant

Criteria: The WOU Supplemental Tuition Grant is a need-based tuition grant program available to qualified Oregon resident students.

Awards: These supplemental tuition grants may vary at institutional discretion but may not exceed the total Tuition assessed for the regular academic year.

Merit Based Fee Remissions

WOU also awards merit-based fee remissions as a means of attracting high achieving students to the university. Recipients are typically selected based on high school or transfer GPA, SAT scores or others indicators of significant academic success.

Athletic Fee Remissions

The WOU Athletic department is given an allocation of fee remission dollars annually for the purpose of recruiting and retaining athletes who will participate in WOU's NCAA Division 2 athletic programs.

VOYAGER Fee Remission

The Voyager Tuition Assistance Program (Voyager) was implemented in the Fall of 2005 in response to a direct gubernatorial request and is intended for National Guard and Reservists who have been in an area of hostility since September 2001 (9/11).

Criteria: The VOYAGER fee remission is for Oregon residents who are members of the National Guard or Reserves and were deployed in an area of military combat since September 11, 2001. This fee remission is for full-time students pursuing their initial bachelor's degree. Students must submit a Free Application for Federal Student Assistance (FAFSA) annually and continue to maintain satisfactory academic progress to maintain eligibility.

Awards: Award is the difference between the National Guard and Reserves tuition benefit of \$4,500 and total enrollment fees. Students are responsible for securing the National Guard or Reserves tuition benefit. Duration of the VOYAGER award is four years excepting those five-year degree programs as documented in the campus general catalogs. Students may not earn more than 15 credits above the minimum number of credits required by the degree to maintain eligibility.

Veteran's Dependent Tuition Waiver

Criteria: The Veteran's Dependent tuition waiver is for qualified students accepted into a baccalaureate or master's degree program at a public university. A qualified student is a child (includes adopted child or stepchild), spouse, or an un-remarried surviving spouse of a service member or a child of a Purple Heart recipient.

The service member is one who:

- Died on active duty;
- Has a 100% total and permanent service-connected disability rating as certified by the United States Department of Veterans Affairs; or
- Died as a result of a military service-connected disability.

The Purple Heart recipient is a person, alive or deceased, who:

- Was relieved or discharged from service in the Armed Forces of the United States with either an honorable discharge or a general discharge under honorable conditions; and
- Was awarded the Purple Heart in 2001 or thereafter for wounds received in combat.

An eligible child must be 23 years of age or younger at the time the child applies for the waiver. A child who is older than 23 years of age is eligible for a waiver for a master's degree program if the child:

- 1) Applied for and received a waiver for a baccalaureate degree when the child was 23 years of age or younger; and
- 2) Applied for a master's program waiver within 12 months of receiving a baccalaureate degree.

The qualifying new, transfer, or community college co-enrolled student must meet Oregon residency requirements, which generally describes an Oregon resident as a person with a bona fide fixed and permanent physical presence established and maintained in Oregon of not less than 12 consecutive months immediately prior to the term of entry.

Awards: The award may be granted for credit hours for courses that are offered at an eligible post-secondary institution. The award does not cover other mandatory enrollment and course specific fees. The maximum waiver granted under this remission program shall be:

- 1) The total number of attempted credit hours equal to four years of full-time attendance for a baccalaureate degree; and
- 2) The total number of attempted credit hours equal to two years of full-time attendance for a master's degree.

Notwithstanding sections 1 and 2 of this paragraph, a waiver may not exceed the total number of credit hours the qualified student needs to graduate with a baccalaureate or a master's degree. Transferred credit hours accepted for a degree program may or may not count toward the total credit hours needed for degree completion.

The amount of tuition waived may be reduced by the amount of any federal aid scholarships or grants, awards from the Oregon Opportunity Grant program established under ORS 348.205, or any other aid from the eligible post-secondary institution, received by the qualified student.

The amount of tuition waived may not be reduced by the amount of any Survivors' and Dependents' Educational Assistance under 38 U.S.C. Chapter 35 paid to a qualified student.

Awards to children of Purple Heart recipients apply only to students admitted as new but not continuing for Fall 2013 or thereafter.

Statutory Authority: ORS 351.656 Waiver of tuition for family members of deceased veterans; limits on waiver; conditions

Nonresident Veteran Fee Remission

As required by Law, every public university shall participate to the fullest extent allowed in the federal educational assistance programs under the Supplemental Appropriations Act of 2008 (e.g., Post 9/11 G.I. Bill and its component Yellow Ribbon Program), so as to reduce the overall tuition rate for students eligible under this policy.

Criteria: The Nonresident Veteran Fee Remission is a tuition and fee reduction for qualified students who are attending classes as an admitted undergraduate or graduate at a public university, and who meet one of the following sets of criteria:

- 1) Is not an Oregon resident and:
 - a. Served in the Armed Forces of the United States;
 - b. Was relieved or discharged from that service with either an honorable discharge or a general discharge under honorable conditions as shown on an original or certified copy of the student's DD-214; and
 - c. Provides proof that the student has established a physical presence in Oregon within 12 months of being enrolled at one of the public universities.

OR

- 2) Was a resident of Oregon who left the state within the previous five years in order to serve, and who subsequently served, in the Armed Forces of the United States or in an international position with the state, federal government or a humanitarian aid organization.

OR

- 3) Was a resident of Oregon who left the state more than five years ago in order to serve, and who subsequently served, in the Armed Forces of the United States or in an international position with the state, federal government or a humanitarian aid organization and never established residence in another state.

Award: Qualified **undergraduate** students who meet criteria 1 and are admitted for enrollment for an academic term prior to Fall 2013 are charged tuition and fees no greater than the resident rate, plus 50 percent of the difference between the resident tuition and fee total and the nonresident tuition and fee total with the following listed qualifications; students admitted as new but not continuing undergraduate students for the Fall 2013 term or later are charged tuition and fees no greater than the resident rate with the following listed qualifications:

Qualified **graduate** students who meet criteria 1 and are admitted for enrollment for an academic term prior to Fall 2014 are charged tuition and fees no greater than non-resident tuition and fee total with the listed qualifications; students admitted as new but not continuing graduate students for the Fall 2014 term or later are charged tuition and fees no greater than the resident rate with the following listed qualifications:

Qualified **undergraduate or graduate** students who meet criteria 2 or 3 and are admitted as new but not continuing students for the Fall 2015 term or later are charged tuition and fees no greater than the resident rate with the following listed qualifications:

- A student who served in the Armed Forces of the United States or in an international position with the state, federal government or a humanitarian aid organization *and* who receives federal tuition benefits in excess of the tuition and fees charged under this policy shall pay tuition and fees equal to the federal tuition benefits received.
- Distance education and self-support courses as identified by each public university are excluded from this discount.
- If a nonresident student is otherwise eligible for tuition benefits under this discount and receiving federal vocational rehabilitation education benefits, that student shall pay full nonresident tuition and fees charged by the enrolling public university.

Statutory Authority: ORS 352.375

Foster Youth Tuition Waiver

The Foster Youth Tuition and Fee Waiver originated with the passage of House Bill 3471 in the 2011 Regular Session of the Oregon Legislative Assembly and is intended to “increase access to higher education for current and former foster children by providing a Tuition and Fee Waiver” to minimize the amount of tuition absorbed by the student. It was further amended by HB 2095 in the 2013 Regular Session to align the definition of “former foster youth” with the federal standard.

Criteria : The Foster Youth Tuition and Fee Waiver is open to qualified current and former foster children enrolled as undergraduate students in an institution of higher education in Oregon for the purposes of pursuing an initial undergraduate degree (as evidenced by admission into an undergraduate degree program). This program waives tuition and fees for current and former foster youth who enroll prior to reaching 25 years of age until the student receives “the equivalent of four years of undergraduate education.”

To qualify for the program, the student must:

1. Have spent at least 180 days in substitute care after age 14, was not dismissed from care prior to reaching 16 years of age and either left foster care (had ward ship terminated) or completed high school/GED within the previous 3 years; and
2. Be admitted to an undergraduate degree program and enroll prior to reaching 25 years of age; and
3. Submit a completed FAFSA (Free Application for Federal Student Aid) for each academic year they are eligible for the program; and
4. For years after the first academic year at an institution of higher education, have completed a minimum of 30 volunteer service hours in the previous academic year performing community service activities such as mentoring foster youth or assisting in the provision of peer support service activities, according to policies developed by the institution of higher education at which the current or former foster child is enrolled.

Awards:

1. A qualified student for The Foster Youth Tuition and Fee Waiver is entitled to waiver of tuition and fees as noted below:
 - Tuition for academic credit courses (at base or differential rates depending upon program to which student is admitted) but not for noncredit courses.
 - Mandatory enrollment fees: building, incidental, health service, recreation center, or other mandatory fees that may be added from time to time.
 - One-time fees: matriculation.
 - Fees required for instruction related services such as lab or course fees that are assessed upon registration for a particular course.
 - The waiver excludes all fees and fines for non-instruction related services and materials such as residence hall room and board, dining services, parking fees and fines, library fines, etc. In addition, text books and other course materials not assessed as part of a course fee are also excluded. Fees considered as "pass through" fees, paid to an outside provider, are exempt from the Tuition and Fee Waiver.
2. Eligible students may receive the Foster Youth Tuition and Fee Waiver for up to 12 terms of full-time study or the equivalent. Attendance at less than full-time will be prorated accordingly.
3. If a student meets all other criteria for eligibility, but does not require the Foster Youth Tuition and Fee Waiver, the student shall remain eligible until the student receives the equivalent of 4 years of undergraduate education.
4. As noted previously, to be considered eligible for this program, the student must complete and submit a FAFSA for each academic year they are eligible for the program. Awards made under The Foster Youth Tuition and Fee Waiver shall be applied after the following:
 - Any federal Pell or Supplemental Educational Opportunity Grants (SEOG)
 - Oregon Opportunity Grant established under ORS 384.205
 - Any other gift, grant or scholarship received from the institution of higher education which may be applied to the tuition and fees covered under this program.

5. For purposes of this program, non-tuition scholarships from sources outside of the University, which pass through either OSAC or the institution, are not included in the calculation of the tuition and fee waiver award amount.

Definition of Terms: For purposes of this waiver, the following terms are defined as follows:

- A “former foster child” is defined as an individual who, for a total of six or more months while between 14 and 21 years of age, was: (a) A ward of the court pursuant to ORS 419B.100(1)(b) to (e) and in the legal custody of the Oregon Department of Human Services (or one of the nine federally recognized Tribes in Oregon) for out-of-home placement and not dismissed from care before reaching 16 years of age; or (b) An Indian child subject to the Indian Child Welfare Act (25 U.S.C. 1901 et seq.), under the jurisdiction of a tribal court for out-of-home placement and not dismissed from care before reaching 16 years of age.
- The “equivalent of four years of undergraduate education” and “equivalent of four academic years” is defined as up to 12 terms of full time study or the equivalent. Attendance at less than full-time will be will be prorated, accordingly.

Statutory Authority: ORS 351.293 Tuition waiver for foster child

Other Reduced Tuition Policies

Western Undergraduate Exchange and Undergraduate Students from Texas

Tuition for students admitted under the Western Undergraduate Exchange (WUE) program is assessed at 150% of the prevailing resident undergraduate tuition rate.

The WUE program allows first-time enrolling, nonresident undergraduate students from participating states to pay 150% of resident tuition when enrolled in selected programs at Oregon Public Universities. Students participating in this program must maintain enrollment in these designated programs to retain qualification. The time spent as a WUE student cannot apply toward residency status. Students previously or currently enrolled in Oregon Public Universities are not eligible for this program. The institutions are not obligated to notify prospective, admitted, or enrolled students who are eligible for this program. Institutions that implement this program must report WUE enrollment as directed, and validate WUE students quarter to quarter. Consistent with the policy of nonresident students covering the full cost of instruction, institutions participating in the WUE should carefully consider whether high demand programs should be eligible for the reduced rates.

Tuition Equity

In keeping with Oregon’s commitment to creating innovative programs that make college more affordable and more relevant to the realities of today’s workforce and economy, the 2013 Oregon Legislature passed the Tuition Equity Act.

The Tuition Equity Act, as outlined in House Bill 2787 (2013), became law on April 2, 2013, and exempts the following students from paying nonresident tuition and fees for enrollment in Oregon’s public universities:

- 1) Students who are not citizens or lawful permanent residents of the United States provided the student:
 - a. During each of the three years immediately prior to receiving a high school diploma or leaving school before receiving a high school diploma, attended an elementary or a secondary school in Oregon;
 - b. During each of the five years immediately prior to receiving a high school diploma or leaving school before receiving a high school diploma, attended an elementary or a secondary school in any state or territory of the United States, the District of Columbia, or the Commonwealth of Puerto Rico;

- c. No more than three years before initially enrolling in a public university listed in ORS 352.002 (EOU, Oregon Tech, OSU, PSU, SOU, UO, and WOU), received a high school diploma from a high school in this state or received the equivalent of a high school diploma (such as a GED); and
 - d. Shows intention to become a citizen or a lawful permanent resident of the United States by submitting to the public university the student attends or plans to attend:
 - i. An official copy of the student’s application to register with a federal immigration program or federal deportation deferral program or a statement of intent that the student will seek to obtain citizenship as permitted under federal law; and
 - ii. An affidavit stating that the student has applied for a federal individual taxpayer identification number or other official federal identification document.
- 2) Students who are financially dependent upon a person who is not a citizen or a lawful permanent resident of the United States if the student:
- a. During each of the three years immediately prior to receiving a high school diploma or leaving school before receiving a high school diploma, attended an elementary or a secondary school in this state and resided in this state with the person upon whom the student is dependent;
 - b. During each of the five years immediately prior to receiving a high school diploma or leaving school before receiving a high school diploma, attended an elementary or a secondary school in any state or territory of the United States, the District of Columbia, or the Commonwealth of Puerto Rico and resided with the person upon whom the student is dependent;
 - c. No more than three years before initially enrolling in a public university listed in ORS 352.002 (EOU, Oregon Tech, OSU, PSU, SOU, UO, and WOU), received a high school diploma from a secondary school in this state or received the equivalent of a high school diploma; and
 - d. For a student who is not already a citizen or lawful permanent resident of the United States, shows intention to become a citizen or a lawful permanent resident of the United States by submitting to the public university the student attends or plans to attend:
 - i. An official copy of the student’s application to register with a federal immigration program or federal deportation deferral program or a statement of intent that the student will seek to obtain citizenship as permitted under federal law; and
 - ii. An affidavit stating that the student has applied for a federal individual taxpayer identification number or other official federal identification document.

A student will continue to qualify for exemption from nonresident tuition and fees (e.g., be able to pay in-state tuition rates) under subsection (1) or (2) above for five years after initial enrollment.

A student who is a citizen or a lawful permanent resident of the United States and who has resided outside of Oregon for more than three years while serving in the Armed Forces of the United States, but who otherwise meets the requirements of subsection (1) or (2) above, shall qualify for exemption from nonresident tuition and fees for enrollment in a public university listed in ORS 352.002 without having to reestablish residency in Oregon.

Reduced Tuition Benefit for Academic and Classified Employees

The academic term rate for employees is 30% of resident undergraduate tuition assessed at the teaching institution, rounded to the nearest dollar. For campuses where an undergraduate differential tuition structure is in effect, the staff fee rate will be charged at the “regular” (not differential) resident undergraduate tuition rate for both undergraduate and graduate student employees.

Charges for Building, Health Service, Recreation, Student Union, and Incidental Fees do not apply; nor are employees entitled to health services or incidental fee services through this program. No Application Fee will be required for employees and no breakage or other deposit is required when registering for classes. Other fees such as lab or course fees are assessed at the full rate and no discount is provided.

Staff fees are not applicable to certain courses. For a complete reference list of excluded programs, please go to <http://www.wou.edu/hr/benefits/stafftuitiondiscount/>. Excluded programs are determined at the discretion of the institution's president and the notice of exclusion must be filed with the institution's Registrars' office prior to the first day of registration for a term.

1. On approval of the president or designee of the teaching institution and with the concurrence of the employee's immediate supervisor, the staff fee is available to employees appointed at half-time (.5 FTE) or more (not including temporary classified employees or other student employees).
2. To qualify for this fee, the staff member must meet the criteria no later than the first day of classes of the term of enrollment. The maximum number of credits to which the staff fee may be applied is 12 credits per quarter or per semester. Some exceptions made for retired employees and employees on leave.
3. Employees enrolled for more than 12 credits in one term will pay for each additional credit at the campus designated per credit tuition rate applicable to resident undergraduate or graduate students, depending upon the employee's degree status.
4. For purposes of this rule, the term "employee" may include persons with full-time courtesy appointments who provide a benefit to the institution in the form of teaching, research, or counseling, under the direction of the institution and using the facilities of the institution.
5. Retired employees and employees on leave are eligible for staff fee privileges. Subject to the approval of the president or designee of the teaching institution, the maximum credit limitation may be waived for retired employees and for employees on leave. See exception under Senior Citizen Tuition.
6. Employees who use the staff fee for courses away from their home institution are subject to staff fee policies and procedures of the instructing institution. *There is no fee plateau at any campus for employees, family and dependents, or retired staff.*
7. Employees may be permitted to take *noncredit* courses at *one-third* of the fee assessed to other registrants. Teaching units are not required to extend staff fees for noncredit courses, self-sustaining workshops, or self-support credit courses.
8. Employees on furlough or lay-off status may be eligible for staff fees in accordance with provisions of a collective bargaining agreement.
9. No tuition shall be assessed to courses enrolled in by employees with a grading option of 'audit.' Attendance under such condition must be with the instructor's consent and on a space-available basis. Institutions are required to maintain a record of the courses audited. Courses approved for audit by the instructor confer no credit to the student, are not charged staff fee rates or regular tuition, and may be used in addition to staff fee privileges during a term. However, any applicable course, lab or material fees associated with auditing for-credit classes will be assessed by the institution and is the responsibility of the employee. This provision cannot be subdivided in conjunction with the Employee Family Member and Domestic Partner Transfer provisions.
10. The benefit may be used at any Oregon public university.

Reduced Tuition Benefit for Family Members and Domestic Partners of Employees

To improve the recruitment and retention of high quality faculty and staff at Oregon's public universities, the staff fee policy is extended to qualified family members, eligible dependents, as well as domestic partners and their eligible dependents on a limited basis.

The academic term rate for family members is 30% of resident undergraduate tuition assessed at the teaching institution, rounded to the nearest dollar. For campuses where an undergraduate differential tuition structure is in effect, the staff fee rate will be charged at the "regular" (not differential) resident undergraduate tuition rate for both undergraduate and graduate student employees.

Qualified family members including spouse, domestic partners, and dependents receiving the transferred benefit are responsible for all mandatory enrollment fees such as Building, Health, Recreation, Student Union, Incidental, Matriculation, and Other fees (Laboratory/Course Fees, Late fees, and Registration fees), if applicable. Breakage and/or other mandatory application deposits are required of the participating family member to register for classes.

Staff fees are not applicable to certain courses. For a complete reference list of excluded programs, please go to <http://www.wou.edu/hr/benefits/stafftuitiondiscount/>. Excluded programs are determined at the discretion of the institution's president and the notice of exclusion must be filed with the institution's Registrars' office prior to the first day of registration for a term.

1. The staff fee provisions may be transferred to a qualified family member or domestic partner of employees appointed at half-time (.5 FTE) or more (not including temporary classified employees, graduate assistants, or other student employees). Employee eligibility is verified through Human Resource System records. To qualify for this fee, the family member, domestic partner, or eligible dependent must meet the criteria no later than two weeks prior to the first day of classes of the term of enrollment.
2. For purposes of this policy, the eligible family members include spouse, domestic partner, dependent children, and dependent children of domestic partners in accordance with IRS Code 152 and Section One of the Public Employees Benefit Board. If requested to do so, the employee is expected to verify family member or domestic partner eligibility by providing documented proof such as a tax return from the prior year.
3. The maximum number of transferrable credits is 12 credits per quarter or per semester. Only one staff member, spouse, domestic partner, or dependent may use the staff fee benefit per term or semester. The benefit may not be subdivided among family members during a term.
4. The qualified family member or domestic partner enrolled for more than 12 credits in one term must pay for *additional credits* at the per credit tuition rate applicable to resident undergraduate or graduate students, depending upon the family member's or domestic partner's degree status. All applicable credits will be charged at the relevant resident tuition rate.
5. The President of a public university may exclude certain programs from the policy. For a comprehensive list of excluded programs please visit the website for the Office of Human Resources.
6. The transfer of staff fee benefits is not available for retired employees.
7. Qualified family members or domestic partners of employees who use the staff fee for courses away from the employee's employing institution are subject to staff fee policies and procedures of the instructing institution. *There is no fee plateau at any campus for employees, retired staff, domestic partners, or eligible dependents.*
8. Qualified family members or domestic partners of employees may be permitted to take noncredit courses at approximately one-third of the fee assessed to other registrants. Teaching units are not

required to extend staff fees for noncredit courses, self-sustaining workshops, or self-supported credit courses.

9. Eligibility of employees on furlough or lay-off status is subject to applicable collective bargaining agreements.
10. No tuition shall be assessed to courses enrolled in by employees with a grading option of 'audit.' Attendance under such condition must be with the instructor's consent and on a space-available basis. Institutions are required to maintain a record of the courses audited. Courses approved for audit by the instructor confer no credit to the student, are not charged staff fee rates or regular tuition, and may be used in addition to staff fee privileges during a term. Any applicable course, lab or material fees associated with auditing for-credit classes will be assessed by the institution and is the responsibility of the family member. This provision cannot be subdivided in conjunction with the Employee Family Member and Domestic Partner Transfer provisions.
11. The benefit may be utilized at any public university in Oregon, however; please note the *Concurrent Enrollment policy was eliminated January 1, 2004.*

Graduate Assistants

Graduate students appointed by the institution and paid at established institutional salary rates as graduate teaching assistants, graduate research assistants, or graduate fellows are exempt from the payment of Tuition up to the first 16 credits per term subject to institutional policy. Appointment as an assistant may not be for less than .15 FTE for the term of appointment.

The Tuition will be assessed to the employing account or department within the institution, not to exceed the graduate resident, full-time student Tuition per term. When an assistant is authorized to exceed 16 credits per term, the institution shall charge the assistant the resident overload Tuition for the excess credits. The enrollment privilege does not apply to self-support courses.

If an assistant has been on an academic year appointment, serving in that appointment SPRING term, and the institution intends to reappoint the assistant in the following WINTER & SPRING TERMS, the assistant may exercise the study privilege during the interim summer term upon approval of the institution.

Graduate assistants are assessed and are individually responsible for payment of the Building, Health, Incidental, Recreation Center, Student Union, and other mandatory fees as approved for the institution and program in which they are enrolled at the credit hour level carried, and at rates applicable to graduate students. Overload Tuition is assessed at the resident graduate student Tuition rate for each overload hour.

Resident Oregon Senior Citizen Program

The Senior Citizen Program is designed for persons not seeking credit or working toward a degree. If credit is sought, charges for special materials or fees, if any, will be assessed according to applicable tuition schedules and records will be maintained. Self-support classes are excluded from this benefit and Incidental Fee services are not available. Oregon resident senior citizens, age 65 or older, may attend classes on a space-available basis.

Statutory Authority: ORS 351.658 Waiver of tuition for Oregon residents at least 65; conditions for waiver; rules

Auditors

Students enrolled in a combination of credit and audit courses or audit only will be assessed for the total credits under the credit tuition and fee schedule appropriate to their classification and residency.

University/School Partnership Co-Pay Program

School districts having contracts with a public university to supervise educator professionals preparing for Oregon licensure may exercise these provisions.

Earning the Co-Pay

For each permissible activity provided under contract with a cooperating district (see 'a' and 'b' below), a district earns a co-pay privilege to register any licensed educational professional employed by the district at the public university co-pay fee rate. The rate should be one-third of the tuition charged for the course. Institutions with current contractual obligations may elect to defer compliance of the rate until expiration of the existing contract.

A "co-pay privilege" allows one individual to register for up to 8 quarter credit hours in the term it is used. The total reduced fee credits awarded for practica and student teaching may not exceed 11 in a year, per each university student provided services by the district.

- a. Supervised full-time student teaching: Co-pay privileges of 5 credit hours may be awarded for supervision of the final full-time student teaching per quarter. Student teaching is the culminating, full-time supervised teaching experience provided for students completing a program approved by the Teacher Standards and Practices Commission, leading to Initial Licensure in one or more of four authorizations: Early Childhood, Elementary, Middle, and High School; and specialty endorsements.
- b. Experiential preparatory practica or part-time student teaching: Co-pay privileges of 3 credit hours may be awarded for supervision of students in experiential preparatory practica or part-time student teaching per academic quarter. These are practica assigned to or required of the student prior to or concurrent with student teaching and block practica and/or other miscellaneous practica offered by colleges and divisions of education for students completing a program approved by the Teacher Standards and Practices Commission, leading to Initial Licensure in one or more of four authorizations: Early Childhood, Elementary, Middle, and High School; and specialty endorsements.

Redeeming Reduced Fee Credits

- c. Earned co-pay privileges must be used by a licensed educator professional employed by the school district within five successive academic quarters (including summer session) following the quarter in which the supervision is provided, after which time the co-pay privilege is void.
- d. The co-pay fee is applicable only up to 8 credit hours in any academic quarter for any one licensed educator professional, including summer session, even though the district may have earned two or more enrollment privileges, or if the licensed educator professional using the privilege enrolls for fewer than 8 credits.

Unused portions of an enrollment privilege may not be carried to another term or used by another teacher.
- e. A co-pay privilege may be used during any academic term (including summer session) at the issuing institution, which has a teacher preparation program. Institutions may enter into "partnerships of trade" with any sister institution if they are willing to accept vouchers from other institutions.
- f. Each institution may set limits on courses available for those redeeming vouchers/co-pays (for example, courses in summer session, distance education, continuing licensure, continuing/extended education). Each institution will indicate on the voucher the existence of restrictions.
- g. The co-pay privilege may also be redeemed by an administrator, counselor, or other licensed educator professional in a cooperating district.

- h. Institutions with current contractual obligations may elect to defer compliance of the rate until the expiration of the existing contract.

Other Provisions

- i. If a licensed educator professional using a co-pay privilege registers for 8 hours or fewer and desires the in-residence services provided by the Health Service and Incidental Fee, the licensed educator professional may elect those services by paying the appropriate fee for the number of hours enrolled. If the licensed educator professional using the co-pay privilege registers for more than 8 credit hours, the first 8 hours may be taken at the institution's co-pay rate. Hours in excess of 8 shall be at the appropriate credit hour rate (graduate or undergraduate, resident or nonresident) and the institution shall charge all Enrollment Fees applicable to the total number of hours for which the licensed educator professional is registering.
- j. Each institution may, at its discretion, extend to the eligible district licensed educator professional other privileges such as use of the institution library, access to campus parking, and admission to campus events at faculty and staff rates, provided that such extended privileges do not exceed the benefits made available to the faculty and staff of the institution.

Other Remission Programs

Institutions may create individual institution fee remission programs to address enrollment management and financial aid program needs. The institution will report to the Board on the creation of each program following guidelines approved by the WOU Board of Trustees.

Awards: Awards may vary in amount but cannot exceed the total nonresident undergraduate or graduate Enrollment Fees (Tuition, Building, Incidental, Recreation Center Building Fee, Student Health Building Fee and Health Service Fees).

Fee Policies Specific to Summer Session

1. Tuition rates may be assessed based on undergraduate and graduate course designation or student classification.
2. Course level designations are generally defined as follows:
 - a. Course numbers assigned 499 and below are assigned undergraduate fee rates.
 - b. Course numbers assigned 500 and higher are assigned graduate fee rates.
3. Tuition may be assessed on a per-credit hour basis or aligned to the preceding academic year structure.
5. Staff, qualifying family/dependents, and graduate assistant fee privileges may be authorized during the Summer Session at the option of the institution. If authorized, fees and study privileges shall conform to policies set forth in this Fee Book. Staff members or qualifying family/dependents who seek to use the staff fee privilege for courses away from their home institution are subject to corresponding fee policies of the instructing institution.
6. Cooperating supervisors of Oregon Student Educator Professionals will be allowed to exercise contract provisions in accordance with policies set forth in this fee book. The program title is University/School Partnership Co-Pay Program.
7. Fees may be assessed during Summer Session under policies set forth in this fee book.
8. The Building Fee is assessed at \$34.00 per student as a mandatory charge to all students attending Summer Session classes, on-campus.

9. The Incidental Fee is based on recommendations and incidental fee guidelines of each institution. Summer fee rates cannot exceed the per-term amount charged during the previous academic year. The University may choose to extend incidental fee services to students not enrolled for Summer Session, under the following conditions:
 - a. A student had been enrolled in the prior academic year term and is expected to enroll in the subsequent academic year term; and
 - b. The student pays the Summer Session Incidental Fee.
11. The Health Service Fee is authorized by the WOU Board of Trustees based on institutional recommendations for the level of service to be provided during the summer. Summer fee rates cannot exceed the per term amount charged during the prior academic year. Institutions may choose to extend health services to students not enrolled for Summer Session, under the following conditions:
 - a. A student had been enrolled in the prior academic year term and is expected to enroll in the subsequent academic year term; and
 - b. The student pays the Summer Session Health Services Fee.
12. Off-campus tuition rates may be established by each institution for summer courses taught outside the campus boundaries. Mandatory fees are generally excluded from off-campus tuition rates but may be assessed when the course enrollment includes the opportunity for participation in services provided by such fees.

Special on-campus tuition rates may be established by the institution for specific short-term, on-campus instructional activities including workshops, seminars, conferences, and short courses. These activities require payment of the Building Fee. Other Mandatory Fees are assessed only if students may participate in the services provided by such fees.
13. A student enrolled in a combination of credit and audit courses will be assessed for the total hours under the tuition and fee schedule appropriate to that individual's course or student level. If enrolled for audit courses only, the student will pay the same required fees as assessed for similar hours of for-credit classes.
14. The summer refund policy for course load reduction or withdrawal may follow the rule adopted in the preceding academic year fee book or a rule adopted by the institution. The intent of this option is to provide an opportunity for institutions to apply policies better suited to management of summer programs.

Refunds, Waivers, and Accounts Receivable Policies

A. Refund Policies

Refund policies for course load reduction or withdrawal are separately developed by each campus and adopted under institution fees and charges procedures. Refunds may be granted to students in accordance with the refund schedule on file with the Registrars or Business Office. This schedule shall be prepared annually.

Military Duty Refund Policy

Any student with orders to report for active military duty may withdraw at any time during the term and receive a full refund. If sufficient course work has been accomplished and the instructor feels justified in granting credit for the course work completed, credit may be granted and no refund will be given.

B. Waiver of Certain Student Fees

Certain student fee charges may be waived when regulations of federal agencies or contract agreements preclude the assessment of those fees. Please contact Western Oregon University's Business Office to determine which fee charges are eligible, if any, for this waiver.

C. Institution Authority to Adjust Charges

Authorized institution officials may make tuition refunds and waive fines or charges that result from circumstances beyond the student's control or are for the best interest of the institution.

D. Revolving Charge Accounts Policy

Extended payment terms utilizing a revolving charge account method adopt rules creating the Revolving Charge Account Plan, and describe the terms and conditions applicable to the Plan.

Transactions covered by the Plan may include (by way of description and not limitation) tuition, fees, housing charges and other obligations primarily involving students; facilities rentals, lease agreements, program user charges and other transactions with non-students; and fines and penalties, incurred by anyone.

These rules shall:

- 1) Describe the interest to be charged, as well as service charges, collection and other fees and costs, if any, and penalties that would apply should an account become delinquent;
- 2) Provide for an agreement to be signed by the obligor, except for debts arising from fines, penalties and the like; and
- 3) Provide that tuition and fees incurred in any given term are paid in full prior to enrollment in any subsequent term.

E. Interest on Overdue Accounts

Section 1: Western Oregon University may, pursuant to an institutionally adopted rule, charge nine percent interest on all liquidated debts that are past due. A liquidated debt is one in which the amount owed is certain, e.g., a standard fee or a debt based on a promissory note.

Section 2: Where the institution so provides by administrative rule and a contract or note signed by the obligor so specifies, the institute may charge not more than 12 percent interest on the obligation evidenced by the signed note or contract.

The University may not charge interest under both Sections 1 and 2, above, simultaneously on a single obligation; in no event shall the institution charge more than 12 percent interest.

Institution rules may provide for interest charges to begin immediately following the date on which a debt becomes overdue or after a specified waiting period.

Differential Tuition Policy

Differential tuition will be allowed in certain programs (as approved by the Board) with the understanding that: 1) an amount equal to 10% of such differential tuition for undergraduate programs be earmarked for financial aid funding targeted to low-income students majoring in the program(s) assessing differential tuition, such that this does not become an impediment to degree choice and 2) programs will need to submit the rationale for the need for differential tuition in accordance with the differential tuition policy framework outlined below.

The University may request WOU Board of Trustees approval for differential tuition at either the undergraduate or graduate level subject to the following:

1. A program considering differential tuition must develop a proposal for WOU Board of trustees consideration addressing the following criteria:

- a. Quality of the student experience:
 - i. The proposal should address how differential tuition will substantially increase the quality of the learning experience for students and provide the basis for later opportunities that would not be possible without the differential revenues.
- b. Access, affordability and student choice of undergraduate major:
 - i. The proposal for differential tuition for undergraduate programs must include a financial aid plan with a minimum of ten percent (10%) of the differential tuition set aside for need-based aid to be awarded to needy students enrolled in the program. The plan shall also include a college advising process that enables the student to anticipate future cost increases and (if necessary) seek additional aid to cover the differential amount over base tuition.
- c. Cost of Instruction:
 - i. The differential tuition proposal must include a clear justification related to the variance in program cost, program demand, and program graduate earnings potential compared to the funds that would be provided through base tuition.
- d. Market Pricing:
 - i. There should be evidence that the differential tuition proposed is comparable to the student cost for similar programs at peer institutions such that the University is not placed at a competitive disadvantage in attracting the best students and that the differential tuition is appropriate to the national market. The proposal should address the elasticity of demand in its justification.
- e. Student Consultation and Support:
 - i. All differential tuition plans must show evidence of extensive and thorough consultation with students who will be affected, both via student representative groups and via organized opinion gathering among the students that would be charged the differential.

Increases to established differential tuition rates are not required to comply with the complete process outlined above for the proposal of new differential rates. However, rate increases that exceed the proposed increase for the institution's corresponding base rate by 2 or more percentage points will need to be supported and should address many of the same criterion listed above though not to the same degree as required for a new proposal. For undergraduate differentials, the discussion of the student consultation element and 10% set aside for need based aid must be included in submitted documentation. For example, if the proposed increase for the undergraduate resident base rate is 3.5% and the proposed increase for an undergraduate differential rate was 5.5%, additional supporting documentation would be required. For graduate programs, there may be situations where a comparable base rate is not available. For example, the institution's graduate program rates may be separately established by program within each college or school. In those cases, proposed rate increases may be supported by an analysis of peer rates and changes in quality of student experience and cost of instruction.

Student Shared Governance Policy

Policy and Guidelines

I. PURPOSE

WOU hereby endorses the concept and philosophy of shared governance between the University and its students. The following policy statement provides a framework and principles for the enactment of a campus-specific policy that sets forth the application of this principle to Western's governance structure.

II. OBJECTIVES

- To recognize the value and importance of assuring students a voice in the educational process, particularly with respect to student life, services, and interests.
- To recognize students' rights to organize themselves and to select and recommend student representatives to the University governance structure.
- To encourage and facilitate student involvement in University decision-making.

III. PRINCIPLES

- A. Ultimate authority for the welfare of WOU resides with the WOU Board of Trustees. The Board has delegated (and may further delegate) aspects of that authority to the President to assure efficient management of the University.
- B. Many aspects of shared governance with the faculty of WOU have a long and successful history.
- C. The intent of the current policy is to recognize the value of shared governance with its students.
- D. It is the intent of this policy to establish support for student shared governance. Accordingly, students shall have the opportunity to participate, appropriate to their special knowledge and perspective, in decisions that relate to, but are not limited to:
 - 1. Academic grading policies
 - 2. Academic disciplinary policies
 - 3. Academic courses or programs to be initiated or discontinued
 - 4. Codes of student conduct
 - 5. Curriculum development
 - 6. Institutional planning
 - 7. Selection and appointment of student services administrators
 - 8. Tuition, fees, room and board rates
 - 9. University mission and vision

IV. IMPLEMENTATION

- A. Western Oregon University shall develop written procedures to incorporate the principles of this Board policy.
- B. Western Oregon University shall report the resulting procedures, evidence of implementation or, in the alternative, provide a report documenting how these principles of shared governance have already been incorporated into the institution's governance structure.
- C. In developing the institutional report referenced above, Western Oregon University shall ensure appropriate input from and collaboration with the officially recognized student government association. For purposes of the report on student shared governance the student government association shall be regarded as the appropriate liaison for student input.

- D. The president is charged with the responsibility of ensuring that the principles of shared governance with students are incorporated, where appropriate, throughout the University.

Adopted by the State Board of Higher Education on April 18, 2003.

Student Involvement in Development of Proposed Tuition Rates

In June 2012, the Oregon State Legislature passed Senate Bill 242 (ORS 351.011). SB 242 included stipulations which required the Board to establish a process that incorporated student participation in tuition-setting (ORS 351.063). In response to the requirements of SB 242, the Board of Higher Education approved the following Oregon Administrative Rule on March 2, 2012.

Student Involvement in Development of Proposed Resident Undergraduate Tuition Rates

(1) The Board shall establish the tuition and fees to be assessed in accordance with applicable statutes and upon the recommendation of the president. This section shall not impair the entities of student government or the Board under ORS 351.070(3)(d).

(2) The University will establish a process for student participation in the development of recommended rates for resident undergraduate tuition. The planned process will be communicated to the duly elected student government for discussion and input.

(3) Prior to the formal submission of proposed tuition rates, the institution president, or designee, will provide an opportunity for the duly elected student government to consider and comment on the proposed rates. Efforts shall be made by both the appropriate student representatives and members of the University administration to accomplish this exchange in a timely manner that 1) provides for adequate student consideration and takes into account the academic calendar and 2) allows the institution to meet necessary deadlines for submission of proposals.

(4) As part of formally submitting rate proposals to the Board, the institution president (or designee) will convey: 1) the process used by the institution to involve students in the development of recommended tuition rates and 2) the specific resident undergraduate tuition rates being proposed.

Tuition and Fee Calculation

The Tuition & Fee Schedules included in this document provide detailed information regarding both Tuition and Fee rates on a per term basis.

Calculating Tuition & Fees

To appropriately calculate total Tuition and Fees, the mandatory fee rates must be added to the appropriate tuition amount based on the number of intended credit hours.

For example, a student classified as a resident undergraduate with a regular major attending Western Oregon University and planning to take 15 credit hours for the term would calculate total tuition and fees as follows:

Source	Table Cell Location	Amount
WOU Undergraduate Regular Tuition Table	Resident 15 credit Hours	\$2,585.00
WOU Mandatory Fees	Undergraduate - Total Fees - 15 credit hours	\$602.00
Total Tuition & Fees – per term		\$3,187.00

Please note that the fees included in the tables in this document are mandatory fees which all campus students are required to pay. WOU may charge additional fees for specific courses (lab fees, etc.) and services (parking, etc.) Contact WOU directly for information regarding any additional fees.

GLOSSARY OF TERMS

GLOSSARY OF TERMS COMMON TO HIGHER EDUCATION

Academic advisement: Each admitted student is assigned to a faculty member or a trained adviser who helps the student create and implement a plan, via regularly scheduled meetings, to attain short- and long-term academic and vocational goals.

Admitted student: Applicant who is offered admission to a degree-granting program at an Oregon public university.

Applicant (first-time, first-year): An individual who has fulfilled the institution's requirements to be considered for admission (including payment or waiving of the application fee, if any) and who has been notified of one of the following actions: admission, non-admission, placement on waiting list, or application withdrawn (by applicant or institution).

Application fee: That amount of money an institution charges for processing a student's application for acceptance. This amount is *not* creditable toward tuition and required fees, nor is it refundable if the student is not admitted to the institution.

Application fee deferral: The application fee for first-time freshmen or transfer students may be deferred for students who meet specific requirements.

Articulation: The process by which two or more institutions align courses and programs to ensure the smooth flow of students between campuses.

Associate degree: An award that normally requires at least two but less than four years of full-time equivalent college work.

Bachelor's degree: An award (baccalaureate or equivalent degree, as determined by the Secretary of the U.S. Department of Education) that normally requires at least four years to complete.

Board rates (charges): Cost for a predetermined number of meals per week: generally within a meal plan.

Building fee: A legislatively mandated fee, on a per term basis, to finance debt service for construction associated with student centers, health centers, and recreational facilities.

Calendar system: The method by which an institution structures most of its courses for the academic year.

Career counseling: A range of services that may include: coordination of visits of employers to campus; aptitude and vocational testing; interest inventories; personal counseling; help in résumé writing, interviewing, launching the job search; listings for those students desiring employment and those seeking permanent positions; establishment of a permanent reference folder; and career resource materials.

Class rank: The relative numeric position of a student in his or her graduating class, calculated on the basis of grade point average, whether weighted or un-weighted.

Continuous basis (for program enrollment): A calendar system classification that is used by institutions that enroll students at any time during the academic year.

Community college transfer student: Within the Oregon Public Universities, "transfer students" must have completed a minimum number of credits for acceptable college level work. The hours required vary among the Oregon public university campuses.

Credit: A unit of recognition of attendance or performance in an instructional activity (course or program) that can be applied by a recipient toward the requirements for a degree, diploma, certificate, or other formal award.

Credit course: A course that, if successfully completed, can be applied toward the number of courses required for achieving a degree, diploma, certificate, or other formal award.

Credit hour: A unit of measure representing an hour (50 minutes) of instruction over a 10-week period within a quarter system. It is usually applied toward the total number of hours needed for completing the requirements of a degree, diploma, certificate, or other formal award.

Deferred admission: The practice of permitting admitted students to postpone enrollment for a specific period-of-time, for example one academic term or one academic year.

Differential tuition: Differential tuition is defined as additional tuition that is supplementary to the base tuition level approved annually by the WOU Board of Trustees. Differential tuition is intended to 1) offset higher than average instructional costs; or 2) provide supplemental resources to enhance program quality; or 3) reflect the market for programs with high demand. *Note: Amounts included in the differential tuition schedules in this document represent the sum of the base tuition and the applicable differential amount.* WOU does not have differential tuition programs at this time.

Degree: An award conferred by a college, university, or other postsecondary education institution as official recognition for the successful completion of a program of studies.

Degree-seeking students: Students enrolled in courses for credit who are recognized by the institution as seeking a degree or formal award. At the undergraduate level, this is intended to include students enrolled in vocational or occupational programs.

Delegation of authority: The Oregon statutes which grant authority to the Board of Higher Education to set tuition and fee rates for Oregon Public Universities through an established rulemaking process.

Distance education: An option for earning course credit at off-campus locations via cable television, Internet, satellite classes, videotapes, correspondence courses, or other means.

Doctoral degree: The highest award a student can earn for graduate study.

Double major: Completion of two undergraduate programs of study simultaneously.

Fee remission: The fee remission is a means by which a student's fees are assessed at the prescribed tuition rate and offset by funds from some other source.

First-time student: A student attending any institution for the first time. Includes students enrolled in the WINTER & SPRING TERMS who attended a postsecondary institution for the first time at the same level in the prior summer term. Also includes students who entered with advanced standing (college credit earned before graduation from high school).

First-time, first-year (freshman) student: A student attending any institution for the first time at the undergraduate level. Includes students enrolled in the WINTER & SPRING TERMS who attended college for the first time in the prior summer term. Also includes students who entered with advanced standing (college credits earned before graduation from high school).

Freshman: A first-year undergraduate student.

Freshman/new student orientation: Orientation addressing the academic, social, emotional, and intellectual issues involved in beginning college. May be a few hours or a few days in length. There is commonly a fee associated with this program.

Full-time student (Undergraduate): A student enrolled for 12 or more quarter credit hours.

Geographical residence (as an admission factor): Special consideration in the admission process given to students from a particular region, state, or country of residence.

Grade point average (GPA): The sum of grade points a student has earned divided by the number of courses taken. The most common system of assigning numbers to grades counts four points for an A, three points for a B, two points for a C, one point for a D, and zero points for an I, W, P, or F.

Graduate assistant: Qualified students who are participating in a post-baccalaureate program and who have been appointed by an institution to assist in teaching courses.

Graduate student: A student who holds a bachelor's or first professional degree, or equivalent, and is taking courses at the post-baccalaureate level.

Health services: Low cost, on-campus, health care available to all full-time admitted students as well as part-time students who choose to exercise this option.

Health services fee: This fee provides for each institution's student health services, which are operated similarly to self-supported auxiliary services.

High school diploma or recognized equivalent: A document certifying the successful completion of a prescribed secondary school program of studies, or the attainment of satisfactory scores on the Test of General Educational Development (GED), or another state specified examination.

Home institution: Institution to which the student is formally admitted and matriculated in a degree program, regardless of where the student is enrolled. In the case where the student is working toward degrees from two Oregon Public Universities at the same time, either institution may be considered the *home* institution.

Honors program: Any special program for accomplished students offering the opportunity for educational enrichment, independent study, acceleration, or some combination of these.

Host institution: Institution to which the student is taking coursework necessary to complete a degree program which is unavailable at the home institution.

Incidental fee: This fee is assessed to provide support for student activities. Student committees make recommendations for the amount and use of the fee on each campus.

In-state tuition: See **Resident tuition**.

International students: See **Nonresident tuition**.

Internship: Any short-term, supervised work experience usually related to a student's major field, for which the student earns academic credit. The work can be full- or part-time, on- or off-campus, paid or unpaid.

Mandatory enrollment fees: Fees that are assessed to all full and part-time students as listed in the Academic Year or Summer Session Fee Books. Fees included in this category are: Building, Health Service, Incidental and Recreation Center.

Master's degree: An award that requires the successful completion of a program of study beyond the bachelor's degree.

Nonresident tuition: The tuition charged by institutions to those students who **do not** meet Oregon residency requirements.

On-campus day care: Licensed day care for students' children (usually age 3 and up); usually for a fee.

Open enrollment: Enrollment for course credits that is available to all qualified students (it is understood that enrollment in certain courses may be subject to requirements e.g., successful completion of prerequisites, grade point average, instructor's consent, etc.).

Other expenses (costs): Includes average costs for clothing, laundry, entertainment, medical (if not a required fee), and furnishings.

Out-of-state tuition: See **Nonresident tuition**.

Part-time student (Undergraduate): A student enrolled for 1-8 credit hours per quarter.

Part-time fee policy: Students enrolled under the part-time student fee policy are subject to the mandatory or course fees appropriate to specific courses taken.

Per Term: A term is equal to one academic quarter.

Programmatic resource fees: Programmatic resource fees assessed to students enrolled in specific academic programs to support extra costs associated with specialized materials, faculty, or services and equipment. These were to be eliminated effective Fall 2011.

Public institution: An educational institution whose programs and activities are operated by publicly elected or appointed officials, and which is supported by public funds.

Public universities: As defined by ORS 352.002:

- 1) University of Oregon
- 2) Oregon State University
- 3) Portland State University
- 4) Oregon Institute of Technology
- 5) Western Oregon University
- 6) Southern Oregon University
- 7) Eastern Oregon University

Quarter calendar system: An academic calendar system in which the instructional year consists of three academic sessions, called quarters, usually consisting of 10-12 weeks each.

Recreation Center fee: A fee approved by student referendum and currently applicable to Western Oregon University students.

Required fees: Fixed sum charged to all students for items not covered by tuition. These fees do not include fees or optional fees such as lab fees or parking fees.

Resident tuition: The tuition charged by institutions to those students who meet state or institutional residency requirements.

Resource fees: These fees include universal fees, assessed to all students and programmatic fees, assessed to students admitted only to particular academic programs.

Summer session: A summer session is generally shorter than a regular academic quarter and not considered part of the academic year. An institution may have 2 or more sessions occurring in the summer months.

Tax Relief Act Reporting: The Taxpayer *Relief Act*, enacted in 1997, provides a tax benefit deduction of interest assessed on education loans for students and their families. The *Relief Act* specifically excludes books, student health insurance, room and board, and other incidental expenses.

Transfer applicant: An individual who has fulfilled the institution's requirements to be considered for admission (including payment or waiving of the application fee, if any) and who has previously attended another college or university and earned college level credit.

Transfer student: A student entering the institution for the first time but known to have previously attended a postsecondary institution at the same level (e.g., undergraduate). The student may transfer with or without credit.

Tuition: Amount of money charged to students for instructional services. Tuition may be charged per term, per course, or per credit hour.

Undergraduate: A student enrolled in a bachelor's degree program, an associate degree program, or a vocational or technical program.

Wait list: List of students who meet the admission requirements but will only be offered a place in the class if space becomes available.

WOU 2018-19 Academic Year

Base Tuition & Promise 2018

Per Term

Data in this table represents Tuition Costs only and does not include Mandatory Fees. The Mandatory Fee information can be found in the Mandatory Fee Tables for this institution. Instructions for calculating total tuition and fees are available beginning on page 29.

Western Oregon University Academic Year 2018-19 Base Rates

Credits	Resident			Non-Resident	
	Undergraduate		Graduate	Undergraduate	Graduate
	Regular	Promise 2018			
1	172.00	199.00	411.00	547.00	671.00
2	344.00	398.00	822.00	1,094.00	1,342.00
3	516.00	597.00	1,233.00	1,641.00	2,013.00
4	688.00	796.00	1,644.00	2,188.00	2,684.00
5	860.00	995.00	2,055.00	2,735.00	3,355.00
6	1,032.00	1,194.00	2,466.00	3,282.00	4,026.00
7	1,204.00	1,393.00	2,877.00	3,829.00	4,697.00
8	1,376.00	1,592.00	3,288.00	4,376.00	5,368.00
9	1,548.00	1,791.00	3,699.00	4,923.00	6,039.00
10	1,720.00	1,990.00	4,110.00	5,470.00	6,710.00
11	1,892.00	2,189.00	4,521.00	6,017.00	7,381.00
12	2,064.00	2,388.00	4,932.00	6,564.00	8,052.00
13	2,236.00	2,587.00	5,343.00	7,111.00	8,723.00
14	2,408.00	2,786.00	5,754.00	7,658.00	9,394.00
15	2,580.00	2,985.00	6,165.00	8,205.00	10,065.00
16	2,752.00	3,184.00	6,576.00	8,752.00	10,736.00
17	2,924.00	3,383.00	6,987.00	9,299.00	11,407.00
18	3,096.00	3,582.00	7,398.00	9,846.00	12,078.00
<i>Each Add'l Credit Hour</i>	<i>172.00</i>	<i>199.00</i>	<i>411.00</i>	<i>547.00</i>	<i>671.00</i>

Endnotes:

- (1) A \$350 one-time undergraduate matriculation fee is assessed on all new and transfer students.
- (2) A \$300 one-time graduate matriculation fee is assessed on all new and transfer students.
- (3) Qualified tuition and fees do not include student health fees for Tax Relief Act reporting.

WOU 2018-19 Academic Year

Prior Year Promise Rates

Per Term

Data in this table represents Tuition Costs only and does not include Mandatory Fees. The Mandatory Fee information can be found in the Mandatory Fee Tables for this institution. Instructions for calculating total tuition and fees are available beginning on page 29.

Credits	Resident Promise Rates			
	Students Admitted Prior to 2018			
	2017	2016	2015	2014
1	198.00	186.00	174.00	170.00
2	391.00	379.00	346.00	338.00
3	584.00	572.00	518.00	506.00
4	777.00	765.00	690.00	674.00
5	970.00	958.00	862.00	842.00
6	1,163.00	1,151.00	1,034.00	1,010.00
7	1,356.00	1,344.00	1,206.00	1,178.00
8	1,549.00	1,537.00	1,378.00	1,346.00
9	1,742.00	1,730.00	1,550.00	1,514.00
10	1,935.00	1,923.00	1,722.00	1,682.00
11	2,128.00	2,116.00	1,894.00	1,850.00
12	2,321.00	2,309.00	2,066.00	2,018.00
13	2,514.00	2,502.00	2,238.00	2,186.00
14	2,707.00	2,695.00	2,410.00	2,354.00
15	2,900.00	2,888.00	2,582.00	2,522.00
16	3,093.00	3,081.00	2,754.00	2,690.00
17	3,286.00	3,274.00	2,926.00	2,858.00
18	3,479.00	3,467.00	3,098.00	3,026.00
<i>Each Add'l Credit Hour</i>	193.00	181.00	172.00	168.00
Endnotes:				
(1) A \$350 one-time undergraduate matriculation fee is assessed on all new and				
(2) A \$300 one-time graduate matriculation fee is assessed on all new and transfer				
students.				
(3) Qualified tuition and fees do not include student health fees for Tax Relief Act				
reporting.				

WOU 2018-19 Academic Year

Mandatory Fees Per Term

The mandatory fees included in the following schedule are applicable to all WOU students and should be added to the applicable tuition charges (based on class-level and total credits) to determine total tuition and fees. In addition, institutions may charge additional fees for specific courses (lab fees, etc.) and services (parking, etc.) Contact the campus directly for information regarding any additional fees.

Western Oregon University
AY 2018-19 Mandatory Fees

Credits	Building		Incidental		Health Service ¹		Student Health Bldg Fee		Student Rec Ctr Bldg Fee		Total Fees	
	Undergraduate	Graduate	Undergraduate	Graduate	Undergraduate	Graduate	Undergraduate	Graduate	Undergraduate	Graduate	Undergraduate	Graduate
1	23.00	23.00	170.00	170.00			11.00	11.00	42.00	42.00	246.00	246.00
2	25.00	25.00	170.00	170.00			11.00	11.00	42.00	42.00	248.00	248.00
3	27.00	27.00	170.00	170.00			11.00	11.00	42.00	42.00	250.00	250.00
4	29.00	29.00	219.00	219.00			11.00	11.00	42.00	42.00	301.00	301.00
5	31.00	31.00	219.00	219.00			11.00	11.00	42.00	42.00	303.00	303.00
6	33.00	33.00	219.00	219.00	141.00	141.00	11.00	11.00	42.00	42.00	446.00	446.00
7	35.00	35.00	291.00	291.00	141.00	141.00	11.00	11.00	42.00	42.00	520.00	520.00
8	37.00	37.00	291.00	291.00	141.00	141.00	11.00	11.00	42.00	42.00	522.00	522.00
9	39.00	45.00	291.00	363.00	141.00	141.00	11.00	11.00	42.00	42.00	524.00	602.00
10	41.00	45.00	291.00	363.00	141.00	141.00	11.00	11.00	42.00	42.00	526.00	602.00
11	43.00	45.00	291.00	363.00	141.00	141.00	11.00	11.00	42.00	42.00	528.00	602.00
12 or more	45.00	45.00	363.00	363.00	141.00	141.00	11.00	11.00	42.00	42.00	602.00	602.00

Endnotes:

(1) For credits 1-5 the Health Center Service Fee is optional and can be purchased for an additional \$141.00.

(2) A \$350 one-time undergraduate matriculation fee is assessed on all new and transfer students.

(2) A \$300 one-time graduate matriculation fee is assessed on all new and transfer students.

(4) Qualified tuition and fees do not include student health fees for Tax Relief Act reporting.

WOU Summer 2019

Base Tuition & Promise 2018

Per Term

Data in this table represents Tuition Costs only and does not include Mandatory Fees. The Mandatory Fee information can be found in the Mandatory Fee Tables for this institution. Instructions for calculating total tuition and fees are available beginning on page 29.

Western Oregon University

Summer 2019 Base Rates

Credits	Resident			Non-Resident	
	Undergraduate		Graduate	Undergraduate	Graduate
	Regular	Promise 2017			
1	172.00	199.00	411.00	547.00	671.00
2	344.00	398.00	822.00	1,094.00	1,342.00
3	516.00	597.00	1,233.00	1,641.00	2,013.00
4	688.00	796.00	1,644.00	2,188.00	2,684.00
5	860.00	995.00	2,055.00	2,735.00	3,355.00
6	1,032.00	1,194.00	2,466.00	3,282.00	4,026.00
7	1,204.00	1,393.00	2,877.00	3,829.00	4,697.00
8	1,376.00	1,592.00	3,288.00	4,376.00	5,368.00
9	1,548.00	1,791.00	3,699.00	4,923.00	6,039.00
10	1,720.00	1,990.00	4,110.00	5,470.00	6,710.00
11	1,892.00	2,189.00	4,521.00	6,017.00	7,381.00
12	2,064.00	2,388.00	4,932.00	6,564.00	8,052.00
13	2,236.00	2,587.00	5,343.00	7,111.00	8,723.00
14	2,408.00	2,786.00	5,754.00	7,658.00	9,394.00
15	2,580.00	2,985.00	6,165.00	8,205.00	10,065.00
16	2,752.00	3,184.00	6,576.00	8,752.00	10,736.00
17	2,924.00	3,383.00	6,987.00	9,299.00	11,407.00
18	3,096.00	3,582.00	7,398.00	9,846.00	12,078.00
<i>Each Add'l Credit Hour</i>	<i>172.00</i>	<i>199.00</i>	<i>411.00</i>	<i>547.00</i>	<i>671.00</i>

Endnotes:

(1) A \$350 one-time undergraduate matriculation fee is assessed on all new and transfer students.

(2) A \$300 one-time graduate matriculation fee is assessed on all new and transfer students.

(3) Qualified tuition and fees do not include student health fees for Tax Relief Act reporting.

WOU Summer 2019

Prior Year Promise Rates Per Term

Data in this table represents Tuition Costs only and does not include Mandatory Fees. The Mandatory Fee information can be found in the Mandatory Fee Tables for this institution. Instructions for calculating total tuition and fees are available beginning on page 29.

Credits	Resident Promise Rates			
	Students Admitted Prior to 2018			
	2017	2016	2015	2014
1	198.00	186.00	174.00	170.00
2	391.00	367.00	346.00	338.00
3	584.00	548.00	518.00	506.00
4	777.00	729.00	690.00	674.00
5	970.00	910.00	862.00	842.00
6	1,163.00	1,091.00	1,034.00	1,010.00
7	1,356.00	1,272.00	1,206.00	1,178.00
8	1,549.00	1,453.00	1,378.00	1,346.00
9	1,742.00	1,634.00	1,550.00	1,514.00
10	1,935.00	1,815.00	1,722.00	1,682.00
11	2,128.00	1,996.00	1,894.00	1,850.00
12	2,321.00	2,177.00	2,066.00	2,018.00
13	2,514.00	2,358.00	2,238.00	2,186.00
14	2,707.00	2,539.00	2,410.00	2,354.00
15	2,900.00	2,720.00	2,582.00	2,522.00
16	3,093.00	2,901.00	2,754.00	2,690.00
17	3,286.00	3,082.00	2,926.00	2,858.00
18	3,479.00	3,263.00	3,098.00	3,026.00
Each Add'l Credit Hour	193.00	181.00	172.00	168.00
Endnotes:				
(1) A \$350 one-time undergraduate matriculation fee is assessed on all new and				
(2) A \$300 one-time graduate matriculation fee is assessed on all new and transfer				
students.				
(3) Qualified tuition and fees do not include student health fees for Tax Relief Act				

WOU Summer 2019

Mandatory Fees Per Term

The mandatory fees included in the following schedule are applicable to all WOU students and should be added to the applicable tuition charges (based on class-level and total credits) to determine total tuition and fees. In addition, institutions may charge additional fees for specific courses (lab fees, etc.) and services (parking, etc.) Contact the campus directly for information regarding any additional fees.

Western Oregon University
Summer 2019 Mandatory Fees

Credits	Building		Incidental		Health Service ¹		Student Health Bldg Fee		Student Rec Ctr Bldg Fee		Total Fees	
	Undergraduate	Graduate	Undergraduate	Graduate	Undergraduate	Graduate	Undergraduate	Graduate	Undergraduate	Graduate	Undergraduate	Graduate
1	34.00	34.00	167.00	167.00	0.00	0.00	11.00	11.00	35.00	35.00	247.00	247.00
2	34.00	34.00	167.00	167.00	0.00	0.00	11.00	11.00	35.00	35.00	247.00	247.00
3	34.00	34.00	167.00	167.00	0.00	0.00	11.00	11.00	35.00	35.00	247.00	247.00
4	34.00	34.00	167.00	167.00	0.00	0.00	11.00	11.00	35.00	35.00	247.00	247.00
5	34.00	34.00	167.00	167.00	0.00	0.00	11.00	11.00	35.00	35.00	247.00	247.00
6	34.00	34.00	167.00	167.00	141.00	141.00	11.00	11.00	35.00	35.00	388.00	388.00
7	34.00	34.00	167.00	167.00	141.00	141.00	11.00	11.00	35.00	35.00	388.00	388.00
8	34.00	34.00	167.00	167.00	141.00	141.00	11.00	11.00	35.00	35.00	388.00	388.00
9	34.00	34.00	167.00	167.00	141.00	141.00	11.00	11.00	35.00	35.00	388.00	388.00
10	34.00	34.00	167.00	167.00	141.00	141.00	11.00	11.00	35.00	35.00	388.00	388.00
11	34.00	34.00	167.00	167.00	141.00	141.00	11.00	11.00	35.00	35.00	388.00	388.00
12 or more	34.00	34.00	167.00	167.00	141.00	141.00	11.00	11.00	35.00	35.00	388.00	388.00

Endnotes:

- (1) For credits 1-5 the Health Service is optional and can be purchased for an additional \$141.
- (2) A \$350 one-time undergraduate matriculation fee is assessed on all new and transfer students.
- (3) A \$300 one-time graduate matriculation fee is assessed on all new and transfer students.
- (4) Qualified tuition and fees do not include student health insurance fees for Tax Relief Act reporting.

Distance Education / Off Campus / Online Course Tuition and Fees

Online Tuition Rates

On-Line Undergraduate courses: \$226 per credit

On-line Graduate courses: \$493 per credit, with exceptions below:

- a. Master of Arts in Interpreting Studies program, \$519 per credit

Online courses have a different tuition rate than campus courses and are NOT included in the Western Promise/Traditional rates. For example, an undergraduate student enrolled in 8 credits of regular classes and a 4 credit online course is charged regular tuition for 8 credits (Western Promise, WUE or other rates, depending on the student's tuition plan) plus the tuition for 4 credits at the online tuition rate.

If online courses are taken in combination with regular campus courses, then fees for building, incidental, student recreation center, (and health service fee if 6 hours or more) will be assessed for all credit hours combined.

Students who are taking only online courses will not be charged campus fees, but may be charged fees related to that course (such as for materials or supplies).

All WOU course credits will count toward financial aid.

ROOM AND BOARD RATES

WESTERN OREGON UNIVERSITY - 2018-19

	A. ROOM AND BOARD OVERHEAD FEES	ANNUAL	FALL	WINTER	SPRING
LANDERS	Double Room (2 people/2 person room)	\$8,360	\$2,926	\$2,926	\$2,508
	Super Single (1 person/2 person room)	\$10,323	\$3,613	\$3,613	\$3,097
BARNUM, BUTLER AND GENTLE	Deluxe Double (2 people/3 person room)	\$9,226	\$3,229	\$3,229	\$2,768
	Triple (3 people/3 person room)	\$8,360	\$2,926	\$2,926	\$2,508
	Single (1 person/3 person room)	\$10,754	\$3,764	\$3,764	\$3,226
	Kitchenette (2 people in a kitchenette)	\$9,418	\$3,296	\$3,296	\$2,826
HERITAGE AND ACKERMAN	Standard Double (2 people/2 person room)	\$8,709	\$3,048	\$3,048	\$2,613
	Single (1 person/1 person room)	\$9,674	\$3,386	\$3,386	\$2,902
	Super Single (1 person/2 person standard double)	\$10,323	\$3,613	\$3,613	\$3,097
<i>Students selecting from options above must also choose a meal plan for <u>each</u> term.</i>					
	B. MEAL PLANS AND FEES	ANNUAL	FALL	WINTER	SPRING
MEAL PLANS	Resident Meal Plan #1	\$855	\$285	\$285	\$285
	Resident Meal Plan #2	\$1,320	\$440	\$440	\$440
	Resident Meal Plan #3	\$1,680	\$560	\$560	\$560
	Resident Meal Plan #4	\$2,055	\$685	\$685	\$685
	Resident Meal Plan #5	\$450	\$150	\$150	\$150
	C. ARBOR PARK APTS.	ANNUAL	FALL	WINTER	SPRING
ARBOR PARK APTS.	Individual Rate for shared apt. (4 people/apt.) <i>(no meal plan included)</i>	\$7,315	\$2,560	\$2,560	\$2,195
	Individual Rate for shared apt. plus board overhead <i>(must choose meal plan from Meal Plan options above)</i>	\$9,610	\$3,364	\$3,364	\$2,882
<i>Rates for the Residence Halls and Arbor Park include data line access, wireless network, \$23.00 social activity fee/term, and \$30.00 laundry fee/term.</i>					
<i>Due to the significant increase in Cable TV costs, University Housing will not provide Cable TV in individual rooms or apartments. Cable TV will continue to be offered in community lounges in the residence halls.</i>					
FACULTY, STAFF and FAMILY HOUSING	D. KNOX STREET-FAMILY HOUSING (does not include board plan): \$675.00 per month <i>cludes utilities, internet through Mlnet Fiber (local provider), and free laundry in community area. Cable TV not included. A \$2 per month social activity fee is included in the monthly rent.</i>				
	E. ALDERVIEW TOWNHOUSES (does not include board plan): \$900.00 per month for an interior unit or \$930.00 per month for an exterior unit <i>cludes utilities and campus internet/data line and wireless access. Washer and Dryer in each unit. Cable TV not included. A \$2 per month social activity fee is included in the monthly rent.</i>				

2019 Summer Session Room and Board Rates

CONFERENCE and GUEST SERVICES HOUSING RATES:

	<u>Multiple</u>	<u>Single</u>
Package #1: (linen/towels provided)		
a) Room w/ shared community bath	\$22.00	\$31.50
b) Room w/ private bath	\$33.50	\$45.00
c) Kitchenette w/ private bath	\$47.25	\$52.50
d) Apartment w/ shared bath & kitchen	N/A	\$47.25

Package #2: (no linen/towels provided)

a) Room w/ shared bath in hallway	\$16.75	\$26.25
b) Room w/ private bath	\$28.25	\$42.00
c) Kitchenette w/ private bath	\$42.00	\$47.25

Rates listed above are based on 1 - 4 Nights Stay

WOU - Sponsored Discount: 10%

Group Discount for Extended Stay (5 or more nights): 5%

Discount for Groups of 300 or More: 5%

Other Options (minimum charges):

Linen Pack Rental = \$5.25/day (Includes mattress pad, pillow, blankets, two flat sheets, towel and washcloth)

Phone Service = arrange through Telecommunications (additional fees will apply)

Network Support = \$25.00 minimum fee if computer set-up/network support is requested

Onsite registration fee = \$100.00 (must be scheduled in advance)

Extended stay fee = \$25.00 per night in addition to nightly rate

After-hours administrative fee = \$25.00 per incident (including but not limited to: excessive lockouts, check-ins, check-outs)

Master key use fee = \$25.00 per set (fee waived for first two sets) + deposit

Deposit = varies depending on complexity of conference; nonrefundable, due May 1st or 6 weeks from the start of the event, whichever is sooner; applied to total bill

Lost Fob = \$25.00 per fob

Lost Key = \$25.00 per Heritage/Landers key; \$50.00 per Ackerman key

Each residence hall has a number of lounges available to rent. The following daily rates apply:

Ackerman Hall (15 available) = \$25/day Ackerman Shared Kitchen = \$30/day

Heritage Hall (3 available) = \$25/day Heritage Hall Inter-Community Lounge (12 available) = \$15/day Heritage Hall Conference Room = \$15/day

Barnum Hall (1 available) = \$20/day

Landers Hall (1 available) = \$25/day

Sequoia Commons = \$30/day

SUMMER SESSION HOUSING RATES:

	<u>4 Wk Rate</u>	<u>6 Wk Rate</u>	<u>8 Wk Rate</u>
Rate for residence hall multiple room	\$392.00	\$588.00	\$784.00
Rate for Arbor Park Apartments (Arbor Park Daily Rate = \$24.00)	\$672.00	\$1,008.00	\$1,344.00

Housing Rate does not include phone line - arrange telephone access through Telecommunications

VIP Apartment Rate \$55/apartment

SUMMER MEAL PLANS/CONFERENCE MEALS:

Valsetz Buffet Plan:

Breakfast	\$7.25
Lunch	\$8.50
Dinner	\$10.00

Discount for Groups over 300: 5%

Lost Meal Card: \$5.00 replacement fee

HOUSING/MEAL PLAN RATES FOR PRE-SEASON ATHLETES:

Housing Rate: \$8.00 per person/night or \$24.00 per person/night if outside preseason window

Meal Plan Rate: Breakfast: \$5.75 Lunch: \$6.50 Dinner: \$8.25

<u>Promise Rate Analysis</u>	<u>2017-18</u>	<u>2016-17</u>	<u>2015-16</u>	<u>2014-15</u>	<u>2013-14</u>	<u>2012-13</u>	<u>2011-12</u>
Per Credit Hour	\$193.00	\$181.00	\$172.00	\$168.00	\$164.00	\$157.00	\$143.00
	\$2,900.00	\$2,717.00	\$2,582.00	\$2,522.00	\$2,462.00	\$2,357.00	\$2,147.00
Four-year cost @ 15 credits per term	\$34,800.00	\$32,604.00	\$30,984.00	\$30,264.00	\$29,544.00	\$28,284.00	\$25,764.00
Non-Promise							
Per Credit Hour	\$165.00	\$155.00	\$151.00	\$148.00	\$148.00	\$145.00	\$143.00
15 Credit Hours	\$2,480.00	\$2,330.00	\$2,270.00	\$2,225.00	\$2,225.00	\$2,180.00	\$2,150.00
Four Year Non-Promise Cost @ 15 credits	\$27,915.00	\$27,150.00	\$26,700.00	\$26,340.00			
Promise Rate 4 years before	\$30,264.00	\$29,544.00	\$28,284.00	\$25,764.00			
Promise Savings/(Cost)	(\$2,349.00)	(\$2,394.00)	(\$1,584.00)	\$576.00			
Percentage Savings/(Cost) to Promise Rate	-7.76%	-8.10%	-5.60%	2.24%			

Enrolled House Bill 4141

Sponsored by Representative HERNANDEZ, Senator DEMBROW, Representatives ALONSO LEON, BYNUM, HEARD, Senators ROBLAN, THATCHER; Representatives KENY-GUYER, MCLAIN, NOSSE, SALINAS, SOLLMAN (Presession filed.)

CHAPTER

AN ACT

Relating to setting the costs of attending public universities; creating new provisions; amending ORS 352.102; and declaring an emergency.

Be It Enacted by the People of the State of Oregon:

SECTION 1. Section 2 of this 2018 Act is added to and made a part of ORS 352.025 to 352.146.

SECTION 2. (1) Each public university listed in ORS 352.002 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.

(2) The public university shall:

(a) Establish a process to ensure that the advisory body required under subsection (1) of this section is composed of no fewer than:

- (A) Two administrators of the university;
- (B) Two faculty members of the university;
- (C) Two students representing the recognized student government of the university; and
- (D) Two students representing historically underserved students of the university, as defined by the public university.

(b) Establish a written document describing the role of the advisory body and the relationship of the advisory body to the public university, president of the university and the governing board.

(3) The public university shall ensure that all members of the advisory body are offered training on:

- (a) The budget of the public university;
- (b) The mechanisms by which moneys are appropriated by the Legislative Assembly to the Higher Education Coordinating Commission for allocation to public universities; and
- (c) Historical data regarding the relationship between the amount of resident tuition and mandatory enrollment fees charged by the public university and the amount of state appropriations that the commission allocates to the public university.

(4) In order to assist the advisory body in making its recommendations, the public university shall provide the advisory body with:

(a) A plan for how the governing board and the public university’s administration are managing costs on an ongoing basis; and

(b) A plan for how resident tuition and mandatory enrollment fees could be decreased if the public university receives more moneys from the state than anticipated.

(5) Before making a recommendation to the president of the university that resident tuition and mandatory enrollment fees should be increased by more than five percent annually, the advisory body must document its consideration of:

(a) The impact of the resident tuition and mandatory enrollment fees that the advisory body intends to recommend to the president of the public university on:

(A) Students at the public university, with an emphasis on historically underserved students, as defined by the public university; and

(B) The mission of the public university, as described by the mission statement adopted under ORS 352.089; and

(b) Alternative scenarios that involve smaller increases in resident tuition and mandatory enrollment fees than the advisory body intends to recommend to the president of the public university.

(6) The advisory body shall:

(a) Provide meaningful opportunities for members of the recognized student government and other students enrolled at the public university to participate in the process and deliberations of the advisory body; and

(b) At a time established by the public university, provide a written report to the president of the university that sets forth the recommendations, deliberations and observations of the advisory body regarding resident tuition and mandatory enrollment fees for the upcoming academic year. The written report must include any minority report requested by a member of the advisory body and any documents produced or received by the advisory body under subsections (4) and (5) of this section.

(7) Each public university shall ensure that the process of establishing resident tuition and mandatory enrollment fees at the public university is described on the Internet website of the public university. This material must include, but is not limited to:

(a) The written document produced by the public university under subsection (2)(b) of this section; and

(b) All relevant documents, agendas and data that are considered by the advisory body during its deliberations.

(8) As used in this section, “resident tuition and mandatory enrollment fees” means the tuition and mandatory enrollment fees for undergraduate students who are enrolled in a degree program and have established residency in Oregon.

SECTION 3. ORS 352.102 is amended to read:

352.102. (1) Except as set forth in this section, the governing board may authorize, establish, eliminate, collect, manage, use in any manner and expend all revenue derived from tuition and mandatory enrollment fees.

(2) The governing board shall establish a process for determining tuition and mandatory enrollment fees. The process must *[provide for participation of enrolled students and the recognized student government of the university.]*:

(a) Include the use of an advisory body in the manner set forth in section 2 of this 2018 Act; and

(b) Ensure that the governing board receives and considers all written reports and minority reports, including all recommendations, deliberations and observations of the advisory body that are provided to the president of the university under section 2 of this 2018 Act.

(3) The governing board shall request that the president of the university transmit to the board the joint recommendation of the president and the recognized student government before the board authorizes, establishes or eliminates any incidental fees for programs under the supervision or control of the board and found by the board to be advantageous to the cultural or physical development of students.

(4) In determining tuition and mandatory enrollment fees for undergraduate students who are enrolled in a degree program and are qualified to pay resident tuition:

(a) The governing board may not increase the total of tuition and mandatory enrollment fees by more than five percent annually unless the board first receives approval from:

- (A) The Higher Education Coordinating Commission; or
- (B) The Legislative Assembly.

(b) The governing board shall attempt to limit annual increases in tuition and mandatory enrollment fees for undergraduate students who are enrolled in a degree program and have established residency in Oregon to a percentage that is not greater than the percentage increase in the Higher Education Price Index, as compiled by the Commonfund Institute.

(5) If the governing board of a public university requests that the commission approve an increase in the total amount of tuition and mandatory enrollment fees of more than five percent under subsection (4)(a) of this section, the public university shall provide to the commission:

(a) All written reports and minority reports, including all recommendations, deliberations and observations of the advisory body that are provided to the president of the university under section 2 of this 2018 Act; and

(b) Any other information or materials the commission determines are necessary in order for the commission to determine whether to approve the proposed increase in the total amount of tuition and mandatory enrollment fees.

[5] (6) The governing board may not delegate authority to determine tuition and mandatory enrollment fees for undergraduate students who are enrolled in a degree program and are qualified to pay resident tuition.

SECTION 4. Section 2 of this 2018 Act and the amendments to ORS 352.102 by section 3 of this 2018 Act first apply to the process used to establish tuition and mandatory enrollment fees for the 2019-2020 academic year.

SECTION 5. This 2018 Act being necessary for the immediate preservation of the public peace, health and safety, an emergency is declared to exist, and this 2018 Act takes effect on its passage.

Passed by House February 20, 2018

Received by Governor:

Repassed by House March 3, 2018

.....M.,....., 2018

Approved:

.....
Timothy G. Sekerak, Chief Clerk of House

.....M.,....., 2018

.....
Tina Kotek, Speaker of House

.....
Kate Brown, Governor

Passed by Senate March 1, 2018

Filed in Office of Secretary of State:

.....M.,....., 2018

.....
Peter Courtney, President of Senate

.....
Dennis Richardson, Secretary of State

Investment Report – Q2 FY18

Board of Trustees
Finance and Administration Committee
April 5, 2018



Western Oregon
UNIVERSITY

Public University Fund Investment Returns

WOU Operating Assets Invested in the PUF	12-31-17	Prior Fiscal YTD	Current Fiscal YTD	3 Year Avg	Market Value	Asset Allocation
Oregon Short Term Fund	0.4%	0.5%	0.8%	0.8%	\$ 20,500,041	44.5% ¹
Benchmark 91 day T-Bill	0.3%	0.2%	0.5%	0.4%		
PUF Core Bond Fund ²	-0.2%	N/A	0.4%	N/A	\$ 25,543,742	55.5% ¹
Blended Benchmark ³	-0.3%	N/A	0.3%	2.2%		
WOU Operating Assets Invested in the PUF	0.1%	-0.3%	0.6%	1.4%	\$46,043,783	100.0%

¹ The Public University Fund (PUF) policy guidelines define investment allocation targets based upon total participant dollars committed. Core balances in excess of liquidity requirements or the participants are available for investment in the Intermediate-Term Pool and the Long-Term Pool. Maximum core investment allocations are determined based upon anticipated average cash balances for all participants during the fiscal year.

² The PUF Core Bond Fund was established on April 3, 2017, to incorporate policy updates and sector exposure restrictions. The securities held in the Oregon Intermediate-Term Pool and Long-Term Pool (excluding fossil-fuels) were transferred into the PUF Core Bond Fund on April 3, 2017.

³ Blended Benchmark Composition: 75% Bloomberg Barclay's Aggregate 3-5 Years Index, 25% Bloomberg Barclay's Aggregate 5-7 Years Index.

Report on Investments – as of December 31, 2017

Market Background

(Provided by Callan Associates, Oregon Investment Council consultant)

Macroeconomic Environment

Another record low in volatility, more record highs in global stock markets, mixed records in global temperatures, a record number of natural disasters in the U.S., and many records associated with President Trump. The Chicago Board Options Exchange Volatility Index, a widely used measure of expected stock market volatility, fell more than 20% in 2017, reaching an all-time low in November. Stock markets hit a number of record highs, adding trillions of dollars to global market capitalization. U.S. consumer confidence remained near a 17-year high and unemployment at a 17-year low. At the same time, geopolitical concerns, domestic political drama and other noteworthy news items littered the headlines but had little effect on investors' complacency. Risk appetite was robust, fueling returns for traditional and non-traditional assets. In the public realm, emerging market equities outperformed developed markets; within fixed income, high yield corporate bonds posted the best returns. Cash, returning less than 1%, was the worst place to be in calendar year 2017. Commodities fared well, bolstered by oil prices and by copper, which gained about 30% for the calendar year on strong global growth and demand from China, the world's largest consumer. A "loser" for the calendar year was the U.S. dollar. As economies overseas gained traction, the U.S. dollar depreciated roughly 10% versus developed market currencies, most notably the euro, after hitting a 14-year high at the outset of calendar year 2017. The calendar year closed with the rushed passage of the largest tax reform bill in 30 years, lending further support to stocks given the significant cut in corporate tax rates. Estimates as to the likely effect of the package on U.S. annual GDP growth vary from "negligible" to upwards of 3%, and the package is expected to add \$1.5 trillion to the budget deficit over 10 years.

In the U.S., third calendar quarter real Gross Domestic Product (GDP) growth was 3.2% (annualized), the fastest pace since the first calendar quarter of 2015 and following similarly robust second calendar quarter growth (+3.1%). After-tax corporate profits rose 4.7% (9.8% year-over-year), consumer spending gained 2.2% and business equipment spending soared 10.8%, the fastest in three calendar years. Labor markets remained tight with the unemployment rate at 4.1%; the lowest since 2000, but average hourly earnings growth continued to languish at 2.5% for the trailing year (as of November). Fueled by high consumer confidence and a robust job market, U.S. retail sales in the holiday period rose at their best pace since 2011, according to MasterCard SpendingPulse, which tracks online and in-store spending. Manufacturing continued to show strength; the Institute of Supply Management manufacturing sector index exceeded 50 (indicating expansion) for 15 consecutive months through November. Inflation remained benign with the headline Consumer Price Index at 2.2% in November (year-over-year (y-o-y)) and Core CPI (ex-food and energy) at 1.7%. Headline CPI was fueled by a 16.5% y-o-y leap in the price of gasoline. Prices of goods, however, fell 0.9% y-o-y with declines broad-based. The Federal Reserve's (Fed) favored measure, the Core Personal Consumption Expenditures price deflator, gained 1.5% y-o-y, remaining below the 2% target. As expected, the Fed hiked the Fed Funds target by 25 basis points at its December meeting to 1.25% - 1.50%. This move marked the third increase of 25 basis points during the calendar year. Markets are pricing in an additional three hikes in 2018, while Fed projections are for rates to end 2018 between 2.0% and 2.25%. President Trump nominated Jerome Powell to become the next Fed Chair, replacing Janet Yellen, whose term expires in February 2018.

Non-U.S. developed economies continued to gain momentum. Third calendar quarter GDP growth in the euro zone was 2.6% (y-o-y) while inflation remained low (1.5% y-o-y as of November). The European Central Bank (ECB) upgraded its 2018 forecast for growth from 1.8% to 2.3%, though growth in the United Kingdom (U.K.) is expected to slow given the yet-undetermined effects of Britain's decision to exit the European Union (Brexit). As expected by markets, the ECB kept its interest rates on hold in the fourth calendar quarter, but it confirmed that it plans to reduce asset purchases to €30 billion a month in January 2018, down from the current rate of €60bn. Unemployment in the euro zone fell to 8.8%, below 9% for the first time since 2009. Unemployment in Germany fell to a record low of 3.6%. Outside of Europe, Japan's economy continued to grow and unemployment reached a 24-year low at 2.7%. The Bank of Japan is expected to continue its stimulus measures in an effort to stimulate inflation (Core CPI +0.9% y-o-y in November).

Equity Market Results

The S&P 500 Index gained 6.6% in the fourth calendar quarter and its 21.8% gain for the calendar year was its best since 2013. The Index hit 62 record highs during the calendar year and had only eight days of 1% or more fluctuations, the lowest number since 1964. The S&P 500 Price Index has nearly tripled (+295%) since its low in March 2009. Valuations are stretched by most measures, but estimates for future earnings are also strong. Markets were fanned by strong corporate earnings, expectations for tax cuts and deregulation, and share buybacks. Large growth stocks were the winners for the quarter and the calendar year (Russell 1000 Growth Index: +7.9%, +30.2%) and small cap value pegged the lower end (Russell 2000 Value Index: +2.0%, +7.8%). For both periods, value underperformed growth across the capitalization stack and small underperformed large across the style spectrum. Among the S&P 500 sectors, Technology was the clear leader for the calendar year (+38.8%) but its 9.0% quarterly return was bested by Consumer Discretionary (+9.9%). All sectors posted positive results for the quarter, with Utilities eking out a 0.2% result. For the calendar year, Energy (-1.0%) and Telecom (-1.3%) lost ground. Technology stocks now comprise 24% of the S&P 500 Index and 38% of the Russell 1000 Growth Index. The high flying quintet of tech stocks, better known as "FAAMG" (Facebook, Apple, Amazon, Microsoft, and Google), continued to perform well in Q4.

	4Q	2017
	(Calendar)	(Calendar)
Facebook	3.3%	53.4%
Apple	10.2%	48.4%
Amazon	21.6%	56.0%
Microsoft	15.4%	40.7%
Google (Alphabet A & C shs)	9.1%	35.6%

Overseas, the Morgan Stanley Capital Indices (MSCI) Europe, Australasia and Far East (EAFE) Index returned 4.2% for the quarter and 25.0% for the calendar year. Annual gains were broad-based and further bolstered by a weakening U.S. dollar. Within the MSCI EAFE, the U.K. notched a record high in the fourth calendar quarter and was up 22.3% for the calendar year. Europe ex-U.K. posted a modest +0.9% result for the quarter and gained 26.8% for the calendar year. Japan returned +8.5% for the quarter and +24.0% in 2017. From a sector perspective for the quarter, Energy (+7%) and Materials (+8%) did the best while Health Care and Telecommunications were laggards with results of just over 1%. For the calendar year, Technology was the clear leader at +51%. Emerging market equities outperformed developed in the quarter and for the calendar year (MSCI Emerging Markets U.S. Dollar Hedged Index: +7.4%; +37.3%). Latin America was the only weak spot in the quarter (-2.3%) but was up a robust 23.7% for the calendar year. Emerging Asia

performed the best for the quarter and the calendar year (+8.4%; +42.8%) driven by strong results from China (+7.6%, +54.1%) and Korea (+11.4%, +47.3%).

Fixed Income Market Results

The U.S. yield curve continued its flattening trend in the fourth calendar quarter. The 2-year U.S. Treasury yield climbed 42 basis points to close at 1.89%, up 69 basis points from December 31, 2016. At the long end of the yield curve, the 30-year U.S. Treasury yield fell 12 basis points during the quarter, ending the calendar year at 2.74% and 32 basis points lower than its close in 2016. This trend reflects the Fed's tightening bias as well as benign inflation. As a result, longer-term bonds sharply outperformed short-term and intermediate-maturity bonds for the quarter and the calendar year. The Bloomberg Barclays Long U.S. Treasury Index gained 2.4% in the quarter and 8.5% in 2017 versus a negative 0.4% quarterly and +1.1% annual return for the Bloomberg Barclays Intermediate Treasury Index. Consistent with the low volatility theme evident in the equity markets, the U.S Treasury 10-year traded in a narrow 60 basis points band for the calendar year, the lowest since 2000. The Bloomberg Barclays U.S. Aggregate Bond Index was roughly flat (+0.4%) for the quarter. Its 3.5% full calendar year return was generated largely from its coupon. Corporate bonds outperformed for the quarter and the calendar year and yield spreads tightened to 93 basis points over Treasuries; a post-crisis high. High yield corporates fared even better, with the Bloomberg Barclays U.S. Corporate High Yield Index up 0.5% for the quarter and 7.5% for the calendar year. Default rates remained below average, but prices are high, relative to historical averages, for the sector. Treasury Inflation Protected Securities (TIPs) outperformed nominal U.S. Treasuries as expectations for future inflation rose. The Bloomberg Barclays U.S. TIPs Index rose 1.3% for the quarter and 3.0% for the calendar year and the 10-year breakeven spread (the difference between nominal and real yields) rose to 1.96% as of calendar year-end.

Outside of the U.S., quarterly returns were mostly flat in developed markets. The Bloomberg Barclays Global Aggregate Bond Index returned +1.8% (unhedged) versus +0.8% for the hedged version. Emerging market debt delivered more muted returns than in earlier quarters. The JP Morgan (JPM) Emerging Market Bond Global Diversified Index (\$ denominated) gained 1.2% in the quarter and 10.3% for the calendar year. Returns were mixed, but beleaguered Venezuela was the outlier for the quarter (-29%) and the calendar year (-34%). The local currency JPM Global Bond Emerging Market Global Diversified Index returned +0.8% in the quarter and +15.2% for the calendar year. In the quarter, Asian countries (+5%) performed best while Latin America sank nearly 5%. Argentina (-7%), Brazil (-3%), and Mexico (-9%) were underperformers for the quarter though Brazil and Mexico both posted double-digit returns for the calendar year.

The municipal bond market performed well in 2017 as rates were steady and demand remained strong even in the face of uncertainty around tax changes. The tax reform package that recently passed is expected to have mixed effects on the municipal bond market. The change in personal income rates is not large enough to have a meaningful impact on the market while the decrease in corporate tax rates is expected to reduce demand for munis from certain corporations, namely banks and insurance companies. Limiting state and local tax deductions could increase demand for in-state munis in high tax states, and the elimination of advance refunding bonds (a small part of the market) will modestly reduce supply over time. Both aspects should be favorable for supply/demand dynamics. Issuance spiked going into year-end in anticipation of changing regulations, setting a record \$62.5 billion for December supply, but the market absorbed it well. The Bloomberg Barclays Municipal Bond Index returned 0.7% for the quarter and 5.4% for the calendar year.

Other Asset Results

Brent crude oil prices closed the calendar year at \$64/barrel, the highest since 2014 and up roughly 12% for the calendar year. Global growth, improving supply/demand dynamics and Organization of Petroleum Exporting Countries (OPEC) agreements contributed to its rise. The energy-heavy S&P Goldman Sachs Commodity Index gained 9.9% during the quarter while the more diversified Bloomberg Commodity Index was up 4.7%. The Alerian Master Limited Partnership Index lost 0.9% for the quarter and sank 6.5% for the calendar year in response to dividend cuts by some of its constituents. Gold gained 1.9% for the quarter and 13.7% in 2017; Real Estate Investment Trusts (REITs) were up modestly for both periods (MSCI: US REIT: +1.4%; +5.1%). U.S. TIPS outperformed nominal Treasuries; the Bloomberg Barclays U.S. TIPS Index returned +1.3% during the quarter and +3.0% for the calendar year. The Dow Jones Brookfield Global Infrastructure Index gained 0.5% in the quarter and 15.8% in 2017.

Closing Thoughts

In spite of various simmering concerns, we ended calendar 2017 the same way we started - with U.S. stock markets at record highs and volatility at historic lows. Meanwhile, there are no shortages of potential headwinds that we might encounter in 2018 and valuations across most asset classes remain stretched by many measures. It is impossible to predict what may spark volatility (bitcoin, Brexit, China, geopolitics, domestic politics, or, most likely a nebulous "other"). As a result, Callan still cautions investors to temper return expectations, to maintain a long-term perspective, and to adhere to prudent asset allocation with appropriate levels of diversification.

Public University Fund

(Prepared by the Public University Fund Administrator)

The Public University Fund (PUF) gained 0.1% for the quarter and 0.6% fiscal year-to-date through December 31, 2017. The PUF's three-year average return was 1.4%.

The Oregon Short-Term Fund returned 0.4% for the quarter, outperforming its benchmark by 10 basis points. The Core Bond Fund declined 0.2% for the quarter, outperforming its benchmark by 10 basis points. In January, Oregon State Treasury fixed income portfolio manager, Tom Lofton, conducted a quarterly performance review with University staff and its investment advisor. Investors are currently forecasting the Fed to lift the Fed Funds rate by 50-75 basis points during calendar year 2018. While rising interest rates support increased income yields, the price declines in the underlying securities may lead to negative total returns during short periods of time, as experienced by the Core Bond Fund during the second fiscal quarter of 2018.

The PUF Administrator invested \$5.3 million of excess liquidity into the Core Bond Fund during the quarter. Approximately \$70 to \$75 million will be systematically invested in the Core Bond Fund over the coming months.

During the quarter, investment earnings distributed to Western Oregon University totaled \$234,482. The market value of WOU's allocable share of the PUF was \$46,043,783 on December 31, 2017.

WOU Operating Assets Invested in the PUF	Quarter Ended 12-31-17	Prior Fiscal YTD	Current Fiscal YTD	3 Year Avg	Market Value	Asset Allocation
Oregon Short-Term Fund	0.4%	0.5%	0.8%	0.8%	\$ 20,500,041	44.5% ¹
<i>Benchmark 91 day T-Bill</i>	0.3%	0.2%	0.5%	0.4%		
PUF Core Bond Fund ²	-0.2	N/A	0.4%	N/A	\$ 25,543,742	55.5% ¹
<i>Blended Benchmark ³</i>	-0.3%	N/A	0.3%	2.2%		
WOU Operating Assets Invested in the PUF	0.1%	-0.3%	0.6%	1.4%	\$46,043,783	100.0%

¹ The Public University Fund (PUF) policy guidelines define investment allocation targets based upon total participant dollars committed. Core balances in excess of liquidity requirements for the participants are available for investment in the Core Bond Fund. Maximum core investment allocations are determined based upon anticipated average cash balances for all participants during the fiscal year.

² The PUF Core Bond Fund was established on April 3, 2017, to incorporate policy updates and sector exposure restrictions. The securities held in the Oregon Intermediate-Term Pool and Long-Term Pool (excluding fossil-fuels) were transferred into the PUF Core Bond Fund on April 3, 2017.

³ Blended Benchmark Composition: 75% Bloomberg Barclay's Aggregate 3-5 Years Index, 25% Bloomberg Barclay's Aggregate 5-7 Years Index.



Western Oregon UNIVERSITY

DATE: 26 MARCH 2018

TO: FINANCE AND ADMINISTRATIVE COMMITTEE, BOARD OF TRUSTEES

FROM: KATHERINE SCHMIDT, UNIVERSITY BUDGET COMMITTEE CO-CHAIR

RE: UBC PROCESS REPORT

OVERVIEW

The University Budget Committee (UBC) first convened eleven months ago, on 27 April 2017. The committee originally consisted of 1 chairperson and 17 members who represent faculty, classified staff, unclassified exempt staff, students, and administrators. In winter 2018, the new university budget manager was added as an additional member, and a faculty co-chair seat was created to assist the interim VPFA with UBC meetings. The co-chairs complement one another in duties: the VPFA provides the content and fiscal expertise while the faculty co-lead provides expertise in managing meetings, ideas, and paperwork.

YEAR ONE

During the inaugural review cycle in spring 2017, UBC reviewed 23 budget-cut proposals that had been selected and forwarded by the President's Cabinet. Because the university strategic implementation planning process was not yet complete last year, UBC was given no criteria for prioritizing these proposals. Aside from cost cutting as an obvious objective, UBC'S ability to evaluate and prioritize was limited. Additionally, the proposal forms did not require sponsors to submit supporting data and impact reports, which further limited the committee's review. Thus, UBC evaluation of the proposals became simple, based on the values of its members: UBC made the protection of livelihoods the priority.

YEAR TWO

PRIMARY CHALLENGE: COMMUNICATION

At a UBC meeting in November 2017, it became clear from the discussion that there was a communication gap between the F&A office and campus regarding the budget proposal process. The need for (1) a more comprehensive communication plan and (2) an extended deadline for initiative proposals was acknowledged.

One month later, it appeared that no attempt had been made to rectify the communication gap that had been identified in November, as the majority of campus remained unaware of the initiatives opportunity, despite the deadline extension.

In the published UBC and budget process summary, the following is written:

The success of the model will depend, to a great extent, on the degree to which the budgeting process allows for campus-wide dialog and participation and the degree to which decisions related to new

resources and reallocation of existing resources are linked to the agreed upon strategic directions of the university.

Up to that point, the budgeting process had not yet included campus-wide dialogues and participation, but it was reasoned that individuals and groups could still have an opportunity to write, vet, and submit proposals, if UBC acted immediately. Therefore, UBC members discussed options via email, which included (1) an allfacstaff announcement be made soliciting initiative ideas (with an apology and explanation for timing) and (2) UBC offer guidance to those interested in responding to the proposals call. Support from UBC was unanimous regarding a last-minute campus-wide-support effort, and many volunteered to assist in providing personalized support to interested parties.

Because of the proximity to the holidays, however, the UBC's plan was deemed problematic by administrators within three hours of the initial email discussion among UBC members. Only minutes after receiving a cease-action message, an announcement for a January 2018 Provost's town hall meeting was sent to faculty leaders (i.e., Senate, WOUFT, and University Budget Committee), with the academic affairs budget and its alignment with the university strategic plan as the topic for discussion. While this was an appropriate alternative, the town hall did not give individuals and groups the opportunity that others had been given in fall; additionally, the meeting was used to disseminate information, as opposed to solicit information and ideas from those in attendance and to provide guidelines for processes.

SECONDARY CHALLENGE: ALIGNING PRIORITIES AND BUDGET INITIATIVES

With the change in F&A leadership and the creation of the faculty co-chair seat, UBC is ready and poised to complement the work that is being done by the President's Cabinet and University Council. However, UBC needs guidance. This year, UBC is considering initiatives, and the 5 Institutional Priorities and 87 Strategic Initiatives are, of course, too broad to serve as budget-decision criteria. University Council has been working in teams to create goals, action steps, and timelines that address strategic priorities, and UBC believes that the Council's work should inform the work of UBC.

Explicit direction from the President's Cabinet and University Council would enable UBC to move forward with confidence, prudence, and strategy, unlike last year. Thus, UBC sent a written request to the President's Cabinet and University Council in February 2018 requesting the following:

- budget guidelines that identify a few of the most important priorities/themes/action plans for implementation over the next two years.

The University Council initially responded to the request by inviting the faculty co-chair to serve as a permanent committee member on the University Council, starting spring 2018. More important to UBC, however, were the budget-formulation criteria.

During the UBC meeting on 16 March, UBC was given a spreadsheet that listed 35 initiative proposal titles and corresponding recommendations from the President's Cabinet for funding:

- 13 of the 23 recurring requests were ranked as Tier 1;
- 6 of the 6 one-time requests were ranked as Tier 1; and
- 6 of the 6 non-narrative requests (e.g., PERS, Willamette Promise, Minimum Wage) were ranked as Tier 1.

The list was accompanied by the following document, which was described to UBC as the guide for reviewing and prioritizing the proposals:



While the infographic captures the complexities of the broad strategic plan, the guide makes no argument for what's next. Using this document as criteria positions all 35 proposals as equals as they relate to strategic priorities, and prioritization becomes a matter of subjectivity during UBC review.

The funding recommendations provided to UBC by the President's Cabinet, however, reveals that arguments are, in fact, being made regarding what's next. Since 16 March, attempts have been made by UBC to decipher the story that the Tier 1 choices tell, with no success. UBC believes that the funding-recommendation decisions of the Cabinet were guided by strategic vision, however, a narrower scope has yet to be articulated to UBC, who is expected to prioritize the bundle of initiatives and make funding recommendations to the President by the end of April.

With regard to decision making, the published UBC and budget process summary includes the following:

The success of the model will depend, to a great extent, on the degree to . . . which decisions related to new resources and reallocation of existing resources are linked to the agreed upon strategic directions of the university.

It could be argued that the strategic directions of a university are similar to strategic directions on a map. As opposed to going everywhere at once, decisions must be made to move from Point A to Point B to Point C, with flexibility for recalculation(s) along the way.

With a committee majority of novices in the area of fiscal expertise and with limited access to the action-oriented trajectory that is being created by University Council, UBC is looking to the President's Cabinet to make tough decisions regarding a few priorities over the next two years soon. The President's Cabinet's Tier 1 rankings suggest that they know this, too.

UBC acknowledges that determining a few priorities from the many is difficult to achieve. UBC realizes that clear and comprehensive communication is also difficult to achieve. The combination of both, however, will enable

WOU to carefully balance the most important needs of its constituents with sound financial management while maintaining momentum for the strategic priorities of the institution. Additionally, the combination will clear the way for UBC to make recommendations this year that support the monumental work that is already under way by administrative working groups.

UBC ACCOMPLISHMENTS

With the January change in leadership, UBC meetings have been formalized, with agendas and approved minutes now being published. Meetings include up-to-date projections and tuition updates from VPFA, along with standing reports from ASWOU and the VPFA search committee representatives. Much time is spent discussing budget processes, and committee members are enthusiastically invested in promoting and sustaining the fiscal health of the university.

Notable achievements since December include the following:

1. revised the initiatives proposal form to include outcomes, an implementation plan, a timeline for assessment/review, supporting data, and an impact report;
2. served as catalyst for the Provost's budget town hall in January, although the town hall's timing limited the possibilities (i.e., there was no description of the initiative proposals process and information was delivered, as opposed to solicited from the group who attended);
3. successfully lobbied for an increase in the student wages base (i.e., 16.2%, which is the first increase in over a decade) to help offset the tiered effects of Senate Bill 1532; and
4. successfully lobbied for contracting with a (reasonably priced) firm for the search phase of the VPFA search process.

UBC 20/20 VISION

As we move forward, UBC has two objectives for years 3 and 4 that help advance the institutional priorities of Accountability and Sustainability & Stewardship: (1) to advocate for efficiency and (2) to improve the student-as-consumer experience. We view these as lenses through which we will see, as we prioritize budget-related challenges and needs and imagine solutions.

Aside from continuing to seek more explicit budget-formulation criteria from the President's Cabinet and the University Council for this cycle, UBC goals for 2020 include the following:

Efficiency

1. create an online submission and archival system for budget proposals;
2. revise the reductions proposal form;
3. create a mechanism for communicating budget-related information to campus and for soliciting feedback, ideas, and questions (e.g., create a calendar, process, and online site for campus-wide dialogs and participation early in the budgeting process);
4. lobby for publicizing budget-formulation criteria early in the budgeting process, which will encourage innovation and participation from the broader community;
5. imagine possibilities for the sharing of initiative ideas by sponsors in a public forum (i.e., like a showcase) early in the process; and
6. revise the UBC charge to include reviewing (and lobbying for efficient and transparent) fiscal processes.

Student-As-Consumer

7. lobby for an efficient, transparent, and well-publicized process for students to use pre-dispersed financial aid monies in the bookstore (watch student testimony from UBC 16 March 2018 meeting: <http://www.wou.edu/ubc/files/2018/03/UBC-Meeting-March-16th.captured-1.mp4>);

8. lobby for efficient and transparent policies and processes for instituting, tracking, evaluating, and eliminating/revising course fees that students pay each term (e.g., music student Elizabeth Chapman paid \$597 in course fees over two terms and science student Jessica Donahue paid \$325 in course fees over three terms); and
9. lobby for the review of student data, enrollment, and degrees, along with a blending of student and finance data to get at key indicators.

March 15, 2018

Dear Colleagues:

I am writing to provide more detail on a number of related principles in support of greater decentralization of campus-wide administrative responsibilities to accomplish the following: (1) greater alignment of authority, responsibility, and accountability and (2) moving the decision-making processes closer to their points of impact. These changes will not only improve the efficiency and effectiveness of units within the university; they will also empower units, divisions and colleges by providing more control over decision-making.

With the advent of independence, Western operates in a competitive and somewhat volatile environment. While other universities in the state and adjacent areas are competing with us for students and state funding, key costs (e.g., PERS and healthcare) continue to remain outside of our control and are projected to increase markedly over the next 5-6 years. Moreover, the HECC funding model requires that we focus on recruiting, retaining, and graduating Oregon students. This allocation model places more emphasis on degrees granted than student credit hours. The new coin of the realm is degrees granted and student success. These changes are fully aligned with our strategic plan, *Forward Together*.

With the dissolution of the Chancellor's office, we are on our own and must act accordingly; however, because we are no longer a state agency, we are not required to comply with many of the state strictures. This freedom enables us to disentangle ourselves from unnecessary administrative details, duplication, and/or contradiction and to reshape our institution to respond to the changing environment in a timely, thoughtful, innovative, and strategic manner.

It's also time to take advantage of our new-found freedom by not only harnessing the capacity of our new Board of Trustees, along with the Foundation Board, but by also recognizing that every single member of the campus community has a stake in our success. We have made strides in developing a more inclusive shared governance structure. As we move forward, we will strive to provide you with fair and equitable compensation, comprehensive benefits, robust training opportunities, and a healthy, functional and transparent work environment.

The following ideas are based on dialog with campus groups, as well as best practices from other institutions, and has been reviewed by the President's Cabinet, Deans, Division Chairs, Board of Trustees leaders, and the University Budget Committee (UBC), who share our overarching views and goals. While we plan to move forward expeditiously, the process will be guided by inclusivity, transparency, and openness.

The proposed changes include:

- Simplified travel reimbursement: we eliminate the need for pre-authorization. Additionally, travel can be booked with Azumano or any other booking option using a procurement card

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or a personal credit/debit card. This will be accompanied by elimination of travel advances and employees are encouraged to utilize direct deposit to accelerate reimbursement. Direct deposits and checks for travel and other reimbursements and vendor payments will be processed twice weekly, generally on Tuesdays and Thursdays. One exception is that travel advances will be available to support athletic team or other student group travel.

- Simplified procurement: All departments will now be authorized to process all procurements with a total value of less than \$25,000. As per policy, procurements of less than \$5,000 need only one quote, and procurements between \$5,000 and \$25,000 need documentation of three quotes.
- Expanded use of procurement cards: To minimize the need for paperwork, we encourage the use of procurement cards. This allows departments to quickly and efficiently make purchases and is a cost-effective means of paying for multiple procurements with one payment to the procurement card provider.
- Simplified contract approval: Departments will be required to sign the agreement before the contracts officer signs. The signer is certifying that they have the budget to pay for the contract consideration, that they need the good or service to accomplish their mission, and that their department will administer and manage the contract upon execution.
- Improved budget development process: Each winter/spring the Vice President for Finance and Administration (VPFA) and staff will make a projection of revenues and expenditures for the coming fiscal year. This projection will start the process and determine whether we are in an investment mode or reduction mode, thereby dictating the process to be used. The UBC will be involved throughout the process, reviewing projections and any notifications or instructions sent to units. Once the budget is approved by the Board, it will be loaded into Banner. At that point, divisions/departments will be expected to adhere to their total budget for the remainder of the fiscal year. Colleges/Divisions/Departments will be free to move budget from one category to another (including OPE and student pay), as long as the total College/Division/Department budget is not changed.
- Other Changes: Registration holds and restrictions on the use of the recreation center will no longer be placed on students for any debts owed in the current term. Registration holds will only be placed if a student owes a past term debt of \$200 or more. This should eliminate many of the registration holds and free our students and staff from this time consuming process.

Additional details concerning these changes may be found [here](#).

As a public entity, we have an obligation to be open and transparent in our operations and with our information. For this reason we have removed the partitioned security in Banner. This

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means that any user will be able to view financial information for any department or for the institution as a whole. Going forward, Western will conduct its affairs in an open, transparent and inclusive manner.

To better enable these changes as well as other changes being contemplated, I will be increasing staffing in University Computing Services to add programming capability. This additional staffing will position us to fully implement document management (digital imaging) for multiple applications, web-time entry, installation of additional modules within Banner, and to develop mobile applications that students can use on their smart phones to add/drop courses, view schedules, grades, debts owed, etc. In addition, this enhanced staffing will help in myriad ways to better improve services to our faculty, staff and students and provide better management information for decision-making purposes. These new staff will be fully funded from savings in recurring charges for Computing Shared Services due to our successful Banner Cloud migration.

Obviously, changes of the type suggested above will require that we bolster training programs to ensure that campus personnel receive instruction on the appropriate ways of making purchases, administering contracts, managing budgets, processing budget changes, etc. This training can be both group sessions using generic examples as well as one-on-one user-specific sessions in departmental offices using your equipment and examples.

It is my hope that these changes can be implemented soon; preferably before the start of a new fiscal year on July 1, 2018. You are encouraged to continue providing input and suggestions on how we can streamline and be more efficient and effective as we move forward. Please let me, Cabinet members or University Budget Committee members know if you have any comments or concerns about the issues and directions we are suggesting above or if you have other ideas for improvement.

Onward!



President



Better Aligning Authority, Responsibility, and Accountability and Improved Services

Travel, Other Personal Reimbursements, Memberships, Hosting and Other Miscellaneous Items:

- Travel: Effective immediately we have eliminated the need for a preauthorization for travel. Departments are now free to book airfare with Azumano or any other booking option; no involvement of the Business Office is needed in this transaction.

If using Azumano, please be prepared to give them your index code and account code to be charged for the cost of the ticket. If you use vendors other than Azumano, please use your departmental procurement card for these purchases.

Since we are eliminating the travel pre-authorization process, we will no longer be providing travel advances, except for athletic team or other student group travel. In order to expedite the travel reimbursement process, we also plan to rely upon departmental review and approvals and post-audits to effectively manage this process and ensure that your reimbursement requests are processed in a timely manner.

- Memberships: We will no longer require President's staff or Business Office approval for memberships. Generally, memberships in organizations and associations should be "institutional" and not "individual" memberships unless a valid reason exists for an individual membership, such as savings on conference registrations, etc.
- Hosting: We are also eliminating the need for executive staff approval of Hosting Forms. In lieu of executive staff approval, Divisional/College budget authority approval will be all that is required for hosting groups and guests and seeking reimbursement for such.
- Reimbursements: Direct deposits and checks for travel and other reimbursements and vendor payments will be processed twice weekly, generally on Tuesdays and Thursdays. It is strongly recommended that employees have travel and other personal reimbursements electronically deposited to their bank account as paper checks are costly and cumbersome.

Procurement and Contracts:

- All departments will now be authorized to process all procurements with a total value of less than \$25,000. As per policy, procurements of less than \$5,000 need only one quote, and procurements between \$5,000 and \$25,000 need documentation of three quotes.

- We are eliminating the need to process purchase orders in Banner with the exception of purchasing fixed assets (value greater than \$5,000, useful life of greater than 3 years), or open PO's that allow you to refer to it several times during the year. Going forward departments should enter direct pay invoices in Banner to process payments to vendors. Regular pay invoices should be entered when referencing a purchase order, such as payments for fixed assets or payments from an open purchase order.
- In order to expedite procurements and minimize the need for paperwork, we encourage the use of procurement cards. This allows departments to quickly and efficiently make purchases and is a cost-effective means of paying for multiple procurements with one payment to the procurement card provider.

To improve accountability and reduce costs, we will be limiting approvals of most transactions to two and no more than three people. The person who completes the request certifies that the good or service was acquired in full compliance with institutional procedures (code of ethics, Uniform Grant Guidance (for those procurements involving federal funds), debt guidelines and other institutional procurement or contract procedures). The person/people who approve(s) the transaction certify(ies) that: 1) they have the budget to cover the cost of the item(s), and 2) the item(s) are needed for mission accomplishment.

- For contracts, departments will be required to sign the agreement before the contracts officer signs. The signer is certifying that they have the budget to pay for the contract consideration, that they need the good or service to accomplish their mission and that their department will administer and manage the contract upon execution (i.e., confirming that services are being performed, inspecting and accepting goods/services, paying the invoice, etc.). The contracts officer will also sign the contract certifying that the document complies with institutional standards and legal requirements.

Education and General Fund Budget Process and Authority:

Currently, our budget process is poorly designed, lacks consultation and transparency, and is centrally managed. Therefore, we propose to change it as follows:

The following budget process aligns with the budget process that was developed last year in consultation with our shared governance groups. <http://www.wou.edu/ubc/about/>

Proposed E&G Budget Process

1. Each winter/spring the Vice President for Finance and Administration (VPFA) and staff will make a projection of revenues and expenditures for the coming fiscal year. This projection will start the process and determine whether we are in an investment mode or reduction mode, thereby dictating the process to be used.
2. The UBC will be involved throughout the process, reviewing projections and any notifications or instructions sent to units. The UBC will also review the budget before the Board will be asked to approve such.

3. Each spring the finance/budget officers will meet with the VP/Provost/Dean or Division Chairs/Directors of each major unit to go through the roster of permanent faculty positions (tenured, tenure track, NTT/fixed term, and adjunct funding), and administrative and classified staff positions to verify the roster and indicate the projected cost of such for the year. This conversation will also include a discussion of the proposed inflationary adjustments (if any) to unclassified/classified pay, student wage, OPE, service and supply and capital outlay budget lines.
4. Once the budget is approved by the Board in the (summer/fall), it will be loaded into Banner. At that point, divisions/departments will be expected to adhere to their total budget for the remainder of the fiscal year.
5. Colleges/Divisions/Departments will be free to move budget from one category to another (including OPE and student pay), as long as the total College/Division/Department budget is not changed. However, permanent (faculty, administrative faculty and classified) positions shall only be created with the approval of the VPFA and cognizant Provost/VP.
 - a. Should mid-year budget changes be required departments will be notified at the earliest possible date. Mid-year changes shall be limited to salary adjustments resulting from collective bargaining agreements that are agreed to after the initial budget has been loaded, mid-year additions/reductions due to unexpected enrollment or other revenue fluctuations, etc.
6. Savings from mid-year position vacancies will be retained by the College/Division/Department, however, the unit will be expected to cover any vacation payoffs for departing employees, search expenditures for new employees and moving or other applicable costs to get new employees on-boarded. Savings from sabbatical or other approved leaves shall be retained in the department to be used to provide coverage or other purposes as determined by the appropriate budget manager.
 - a. Vacancies in permanent faculty (tenured, tenure-track and NTT/fixed-term) positions shall accrue to the Provost at the end of year, who will consult with the Deans to determine the appropriate disposition of the position; be it to be refilled in the same department, transferred to another department or re-allocated for other purposes.
7. At year end all budget carry-forwards (both positive and negative) shall be rolled up at the College/Division level. If carry-forwards are positive, Colleges/Divisions may request reinstatement of all or part of the carry-forward in the next fiscal year. Final decisions on these matters will reside with the President and Vice President for Finance and Administration.
8. Budget overdrafts will not be tolerated.
 - a. If a College/Division is trending toward an overdraft situation it should immediately notify the appropriate supervisor and VP Finance and Administration who will advise on corrective action.
9. Assuming resources are projected to be adequate, an operating reserve will be budgeted at the beginning of the year. Calls against the reserve will be tracked by the budget office and will be decided upon by the President in consultation with Cabinet staff. Decisions could include: to fund the request immediately, defer the request, deny the request or carry the request forward

until resource levels are more certain. Once the request is approved by the President or designee, the requesting entity will be informed of the decision and funds will be removed from the operating reserve and transferred to the requesting organization.

10. Colleges/Divisions will receive a budget report each month from the Budget Office. Said reports shall summarize the budget to actual and encumbered amounts by College/Division, however, detail by department will also be available if needed to address questions or concerns. Quarterly, the budget office will provide a summary of revenues and expenditures to date complete with projections to year-end. These reports are intended to keep the leadership of the Colleges/Divisions in the know about the institution's resources, budget and status.

To be congruent with this new budget process we have also turned off NSF checking in Banner. Thus transactions will no longer be rejected due to lack of budget. We also plan to empower departments with the authority to directly enter balanced budget changes into the system without further approval from the Business or Budget Offices. These budget changes must be balanced within the College/Division, thus any budget increases must be offset by equal budget decreases as needed to balance the transaction.

Other Changes:

Registration holds and restrictions on the use of the recreation center will no longer be placed on students for any debts owed in the current term. Registration holds will only be placed if a student owes a past term debt of \$200 or more. This should eliminate many of the registration holds and free our students and staff from this time consuming process.

We are also changing the budgeting of Federal Work Study Program (FWSP) to eliminate the subsidiary spreadsheet budget for such – next year, individual departments will no longer have a separate allocation for FWSP wages, rather all will rely on their student wage budgets to fund this type of expense. The Financial Aid Office will control FWSP expenditures at the student award level which is easily determined in the student's Portal.

New Employee Recruitment Process:

Per the above budget process, since we are now leaving vacancy savings in departmental budgets, effective immediately the College/Division/unit will directly assume the costs of recruiting and on-boarding employees. Human Resources will continue to monitor and participate in the recruitment and employment processes at the policy and compliance level. Human Resources will no longer be involved as a clearing house for the costs associated with the recruitment and employment processes, except in the area of advertising and background checks. Advertising and background checks costs will continue to be billed to the departments by Human Resources. All other costs of recruitment and on-boarding will be the direct responsibility of the department.