

Board of Trustees of the University of Oregon
Public Meeting
10:00 am – March 4, 2016
Ford Alumni Center, Giustina Ballroom

10:00 am (other times approximate) – Convene Public Meeting

- Call to order, roll call, verification of quorum
 - Opening remarks
 - Approval of December 2015 and February 2016 minutes, and March 2015 Presidential Factors Committee minutes (Action)
 - Public comment
- Those wishing to provide comment must sign up advance and review the public comment guidelines either online (<http://trustees.uoregon.edu/meetings>) or at the check-in table at the meeting.*

1. **AY2016-17 Tuition and Fees (Action)**, President Michael Schill, Vice President for Finance and Administration/CFO Jamie Moffitt and Vice Provost for Budget and Planning Brad Shelton

Break

1b. Additional Resolutions from Committee

--Seconded Motion from FFC: Authorization for Bond Issuance (pending March 3 committee action)

2. **President's Report and Strategic Framework Overview**, President Michael Schill
3. **Presidential Goals and Evaluation (Action)**, Chair Chuck Lillis and Vice Chair Ginevra Ralph
4. **Capital Campaign and University Advancement Update**, Vice President for Advancement Mike Andreasen
5. **University of Oregon Foundation Overview**, University of Oregon Foundation President and CEO Paul Weinhold
6. **Information Technology Strategic Planning**, Provost and Senior Vice President Scott Coltrane, Vice President for Finance and Administration/CFO Jamie Moffitt, Interim Vice President for Research Brad Shelton and Assistant Vice President and Chief of Staff to the Provost Melanie Muenzer

Meeting Adjourned



Agenda Item #1: AY2016-17 Tuition and Fees (see supplement tab)

Agenda Item #1b: Additional Resolution from Committee -
Authorization for Bond Issuance



ISSUANCE OF GENERAL OBLIGATION BONDS

Overview of Requested Authorization

This summary is the same as that provided to the Finance and Facilities Committee. If you are interested, Section 2 of that meeting's materials contains additional information provided by the Director of Treasury Operations.

The Board of Trustees is asked to authorize the issuance of general obligation bonds in an amount not to exceed \$60,000,000. The UO's Treasury Management Policy requires board approval for any financing activity in excess of \$5 million.

Proceeds from these bonds will be used to provide capital to UO's internal bank so that it has long-term funds to lend for authorized capital projects that benefit the university. The largest recipient is expected to be Student Housing as they construct the new residence hall. (The timeline of the residence hall project would not change.) The remainder is planned for various small (less than \$5,000,000) capital projects, to cover costs related to the bond sale, and to cover any capitalized interest costs.

This request was originally anticipated to be before the Board in fiscal year (FY) 2017. However, due to persisting historically low interest rates, the university may be able to benefit from issuing the bonds sooner in order to capture longer-term savings. If rates normalize, the university may need to revert to its original schedule. Thus the purpose of board action at this time is to give the university flexibility to issue the bonds at whichever time is expected to be most beneficial. University staff consults with a professional team of financial advisors and underwriters to understand the ramifications of these timing differences. Staff will keep the board apprised of the timing of the issuance.

These bonds would be issued not later than June 30, 2017 and would mature by October 31, 2047. Treasury Management estimates that the yield of this bond issuance, if issued within the next three months, could range between 3.25% and 3.75% depending on structure and types of bonds issued. The annual interest payment is expected to be approximately \$2,500,000. Depending on the structure of the bond sale and the type of bonds sold, our financial advisors estimate that if long-term interest rates rise by even a small increase between the time we actually sell the bonds (likely Spring 2016) and Spring 2017 (as originally anticipated), that the long-term savings in capital costs will more than offset the negative carrying costs of issuing the bonds a year early.

The resolution authorizes the UO's treasurer, or her designee, to issue the bonds, manage payment of the principal and interest, establish the structure of the bonds, and issue additional bonds to defease or refund other outstanding long-term obligations for the purpose of reducing costs.

The UO's policy relating to liability management states that the Board will consider the following with respect to such authorizations: the impact of the new liability on the institution's ability to achieve its mission, the cost of capital, and how the transaction affects the institution's ability to meet existing obligations.

Board of Trustees of the University of Oregon

Resolution: Authorization of 2016 General Revenue Bonds

WHEREAS, ORS 352.087(1)(b) authorizes the University of Oregon (the "University") to borrow money for the needs of the University in such amounts, at such times, and upon such terms as may be determined by the University acting through its Board of Trustees (the "Board"); and

WHEREAS, ORS 352.408(1) authorizes the University to issue revenue bonds for any lawful purpose of the University in accordance with ORS chapter 287A, and to issue refunding bonds under ORS 287A.360 to ORS 287A.380 of the same character and tenor as the revenue bonds replaced; and

WHEREAS, Section 3.1 of the University Treasury Management Policy provides that the University may use debt or other financing agreements to meet its strategic objectives and, pursuant to Section 3.2 of the Treasury Management Policy, the Board, or its designated Committee, must authorize debt transactions, financing agreements, hedging instruments, and other derivatives when the par or notional amount is greater than \$5,000,000; and

WHEREAS, Section 3.4.2 of the University Treasury Management Policy authorizes the Treasurer to enter into financing transactions for the purpose of mitigating the risk of existing obligations and/or reducing the overall cost of debt; and

WHEREAS, the University has previously issued and has outstanding its General Revenue Bonds, 2015A in the aggregate principal amount of \$50,000,000 (the "2015 Bonds"), and the University now desires to authorize the issuance of one or more series of general revenue bonds on a parity with or subordinate to the pledge securing the payment of the principal of an interest on the 2015 Bonds in an aggregate principal amount not to exceed \$60,000,000; and

WHEREAS, ORS 352.087(1)(t) authorizes the University to delegate any and all powers and duties, subject to the limitations expressly set forth in law;

WHEREAS, the Board has considered the impact of the general revenue bonds and general revenue refunding bonds authorized by this resolution on the University's ability to achieve its mission and strategic objectives, the cost of issuing and paying the bonds, and how the bonds will affect the University's ability to meet its existing obligations, and has determined that it is in the best interests of the University to approve the issuance of the bonds as set forth in this resolution, and to delegate the powers of the Board related to the bonds to the Treasurer of the University, and her designee, to approve the sale of the bonds and certain terms of the bonds; and

WHEREAS, the Finance and Facilities Committee has referred this matter to the full Board as a seconded motion, recommending adoption;

NOW, THEREFORE, the Board of Trustees of the University of Oregon hereby adopts this resolution as follows:

1. Appointment of Authorized Representative. The Board hereby authorizes the Treasurer of the University, and her designee, each acting individually and on behalf of the University and not in his

or her personal capacity (the "Authorized Representative"), to act as the authorized representative for and on behalf of the University in connection with the issuance and sale of general revenue bonds (the "New Money Revenue Bonds") and general revenue refunding bonds (the "Refunding Revenue Bonds" and, together with the New Money Revenue Bonds, the "Revenue Bonds") to carry out the purposes and intent of this resolution. The signature of the Authorized Representative or his or her designee shall be sufficient to bind the University with respect to any Revenue Bonds, certificate, agreement or instrument related thereto, and shall be sufficient to evidence the Authorized Representative's approval of the terms thereof.

(a) Revenue Bonds Authorized.

(i) New Money Revenue Bonds. The Board hereby authorizes the issuance of not more than Sixty Million Dollars (\$60,000,000) in aggregate principal amount of New Money Revenue Bonds under ORS 352.087(1)(b) and/or ORS 352.408 for University purposes, to fund debt service reserves, if any, and to finance other costs related to issuing a series of New Money Revenue Bonds, including but not limited to capitalizing interest.

(ii) Refunding Revenue Bonds. The Board further hereby authorizes the issuance of Refunding Revenue Bonds under ORS 352.087(1)(b) and/or ORS 351.408 to defease, prepay or refund short-term or interim financing incurred under Section 3.4.1 of the University Treasury Management Policy, to defease, prepay or refund any or all of the payments to be made by the University in connection with bonds issued by the State of Oregon for the benefit of the University, to pay costs of issuance, and to pay defeasance, prepayment and refunding costs.

2. Special Obligations of the University. The Revenue Bonds shall be special obligations of the University that are payable solely from legally available revenues of the University that the University pledges to pay the Revenue Bonds.

3. Bond Sale Authorized. The Authorized Representative is hereby authorized, on behalf of the Board and without further action by the Board, to take any of the following actions that may be required if needed in connection with the issuance and sale of Revenue Bonds authorized herein:

(a) Issue the Revenue Bonds in one or more series and at different times; provided that any series of Revenue Bonds under this resolution shall be issued on or before June 30, 2017.

(b) Pledge all or any portion of the legally available revenues of the University to pay and secure the payment of the principal of and interest on each series of Revenue Bonds, and determine the lien status of each pledge.

(c) Apply the proceeds of any series of New Money Revenue Bonds to pay or reimburse costs of the University, to fund debt service reserves, if any, and to pay other costs related to issuing a series of Revenue Bonds, including but not limited to capitalizing interest.

(d) Determine whether to pay or refinance short-term or interim financing or to defease, refund or prepay University obligations including any or all of the payments to be made by the University in connection with bonds issued by the State of Oregon for the benefit of the University.

(e) Apply the proceeds of any series of Refunding Revenue Bonds to pay or refinance short-term or interim financing, to defease, refund or prepay University obligations including any or all of the payments to be made by the University in connection with bonds issued by the State of Oregon for the benefit of the University, to pay costs of issuance, and to pay defeasance, prepayment and refunding costs.

(f) Participate in the preparation of, authorize the distribution of, and deem final the preliminary and final official statements and any other disclosure documents for any series of Revenue Bonds.

(g) Establish the final principal amount, maturity schedule, interest payment dates, interest rates, denominations and all other terms for each series of Revenue Bonds; provided, that the true interest cost of any New Money Revenue Bonds shall not exceed eight percent per annum, and the final maturity date for any New Money Revenue Bond shall be on or before October 1, 2046.

(h) Select one or more underwriters or lenders and negotiate the sale of that series of Revenue Bonds to those underwriters or lenders, and execute and deliver one or more bond purchase agreements.

(i) Undertake to provide continuing disclosure for any series of Revenue Bonds in accordance with Rule 15c2-12 of the United States Securities and Exchange Commission.

(j) Apply for rating(s) for any series of Revenue Bonds.

(k) Draft and approve the terms of, and execute and deliver, one or more bond declarations which pledge all or a portion of the legally available revenues of the University to particular series of Revenue Bonds, make covenants for the benefit of owners of the Revenue Bonds, describe the terms of the Revenue Bonds that are issued under that bond declaration, and describe the terms under which future obligations may be issued on a parity with those Revenue Bonds.

(l) Appoint and enter into agreements with paying agents, escrow agents, bond trustees, verification agents, and other professionals and service providers.

(m) Issue any series of Revenue Bonds as taxable bonds, including as taxable bonds that are eligible for federal interest subsidies or tax credits.

(n) Issue any series of Revenue Bonds as governmental and/or 501(c)(3) tax-exempt bonds, hold public hearings, take actions and enter into covenants to maintain the tax status of that series of Revenue Bonds under the Internal Revenue Code of 1986, as amended (the "Code").

(o) Provide for the Revenue Bonds to be held in certificated or uncertificated form.

(p) Execute and deliver any agreements or certificates and take any other action in connection with the Revenue Bonds that an Authorized Representative finds will be advantageous to sell and issue the Revenue Bonds and carry out this resolution.

4. Ratification and Approval of Actions. The Board hereby ratifies and approves all prior actions taken on behalf of the Board or University related to such Revenue Bonds. The Board hereby

authorizes, empowers, and directs the Authorized Representative to take further actions as may be necessary or desirable related to such Revenue Bonds, including, without limitation, the execution and delivery of agreements necessary or desirable to carry out such actions or arrangements, and to take such other actions as are necessary or desirable for the purposes and intent of this resolution.

- 5. Effective Date.** This resolution shall take effect immediately upon adoption by the Board.

Trustee	Yes	No
Ballmer		
Bragdon		
Chapa		
Colas		
Curry		
Ford		
Gary		
Gonyea		
Kari		
Lillis		
Paustian		
Ralph		
Wilcox		
Willcox		

Date: _____

Recorded: _____



Agenda Item #2

President's Report and Strategic Framework Overview

Enclosed is a copy of the 2016-2021 Strategic Framework, which was finalized by President Schill and Provost Coltrane in mid-February after more than a year of work by faculty, staff and students. This document articulates strategic initiatives to support the president's overarching institutional priorities: excellence in teaching and research, student access and success, and an enriching experience. It also looks at initiatives to support the underlying infrastructure and administration necessary to execute this vision.

President Schill will reference this Strategic Framework during his president's report and thus it is provided as background reading in advance of the meeting.

EXCELLENCE

2016-2021 strategic framework for the University of Oregon



February 29, 2016

We are pleased to share with you the University of Oregon's 2015-2021 strategic framework, simply and appropriately titled, "EXCELLENCE."

This framework is a guiding document, meant to be aspirational. It will provide us all with a set of objectives and principles by which to judge our work as we collectively move forward. We will contemplate priorities, decisions, and actions based on whether they are consistent with this framework.

The document is meant to complement the UO's mission statement (adopted in 2014). Further, the framework is not a "plan"—it does not contain metrics or specific tactics—and to be honest, we may not have the resources to fully execute all of these strategies. That will not, however, preclude us from striving to reach the important overall goals contained in the framework to enhance excellence at the University of Oregon.

Thank you to everyone who participated in the process to develop this framework, and to each and every member of the UO community—excellence is, without question, a team effort.

Sincerely,

Michael H. Schill
President

Scott Coltrane
Provost and Sr. Vice President

Imagine...

- a preeminent research university rooted in a liberal arts and sciences education.
- an institution that teaches people to think deeply, critically, and creatively.
- an incubator where inquiry leads to real impact.
- a place where innovation occurs at the intersection of disciplines.
- a close-knit, human scale academic community with global reach.
- a setting where mountains, forests, rivers, and beaches are part of the everyday learning environment.
- a home for students, researchers, teachers, and employees consistently focused on the greater good.

Welcome to the University of Oregon.

The University of Oregon's Mission, Purpose, Vision, and Values

Our Mission	The University of Oregon is a comprehensive public research university committed to exceptional teaching, discovery, and service. We work at a human scale to generate big ideas. As a community of scholars, we help individuals question critically, think logically, reason effectively, communicate clearly, act creatively, and live ethically.
Our Purpose	We strive for excellence in teaching, research, artistic expression, and the generation, dissemination, preservation, and application of knowledge. We are devoted to educating the whole person, and to fostering the next generation of transformational leaders and informed participants in the global community. Through these pursuits, we enhance the social, cultural, physical, and economic wellbeing of our students, Oregon, the nation, and the world.
Our Vision	We aspire to be a preeminent and innovative public research university encompassing the humanities and arts, the natural and social sciences, and the professions. We seek to enrich the human condition through collaboration, teaching, mentoring, scholarship, experiential learning, creative inquiry, scientific discovery, outreach, and public service.
Our Values	We value the passions, aspirations, individuality, and success of the students, faculty, and staff who work and learn here. We value academic freedom, creative expression, and intellectual discourse. We value our diversity and seek to foster equity and inclusion in a welcoming, safe, and respectful community. We value the unique geography, history and culture of Oregon that shapes our identity and spirit. We value our shared charge to steward resources sustainably and responsibly.

Strategic Framework 2015

Institutional Priorities

1. Promote and enhance student access, retention, and success.
2. Enhance the impact of research, scholarship, creative inquiry, and graduate education.
3. Attract and retain high quality, diverse students, faculty, and staff.
4. Enhance physical, administrative, and IT infrastructure to ensure academic excellence.

Promote and enhance student access, retention, and success.

The UO will create a cohesive four-year undergraduate experience that propels students on an inspiring and rewarding path by fully integrating a liberal arts and sciences education, a purposeful major, meaningful experiential opportunities, and intentional post-graduation planning. The UO will offer effective support for all students—including programs tailored to those from diverse backgrounds—to ensure a path to timely completion.

STRATEGIES & INITIATIVES

1. Improve, enhance, and establish new programs aimed at increasing student access, retention, and success.
 - Foster institution-wide collaboration among various student-focused services to ensure access and efficacy, and eliminate redundancy.
 - Make better use of data to identify at-risk students as well as adopting the tools needed to support those students in achieving success at the UO.
 - Expand programs that provide students of limited means with access to the UO and enhanced opportunities for successful and timely completion.
 - Expand and coordinate student academic advising and remove unnecessary curricular and administrative barriers to timely completion.
2. Provide an integrated, compelling educational experience that allows students to graduate in four years while accommodating the needs of transfer and nontraditional students.
 - Engage in a comprehensive review of the structure of the four-year educational experience of undergraduate students—including general education requirements—and identify potential pilot projects or models based on best practices.
 - Maximize opportunities for undergraduate students to learn directly from and build relationships with faculty engaged in research and creative discovery.
 - Adopt a learning-outcome approach to mapping education at the UO.
 - Focus on engaged learning that combines service and experiential learning opportunities.
 - Expose all undergraduate students to meaningful research experiences and global perspectives.

- Ensure that all students develop an understanding of the challenges and opportunities created by living in an increasingly diverse society.
 - Leverage the use of technology to achieve educational goals and undergraduate student success.
 - Support undergraduate mentoring and advising by emulating best practices and strengthening student-faculty interaction.
 - Reflect best practices in diversity, equity, and inclusion as part of curricular and programmatic review.
 - Expand Academic Residential Communities and other learning communities.
3. Enhance post-graduation planning and success to help launch students into their futures after the UO.
- Expand undergraduate research opportunities and internships.
 - Explore ways to use the emerging presence of the university in Portland to connect students with exciting internships and employment opportunities.
 - Enhance pipeline preparation opportunities into graduate and professional programs for students who seek additional education, with special attention to programming for underrepresented students.
 - Develop institutionally-supported opportunities to promote and share integrated learning experiences (e.g. e-portfolios, transition, or capstone projects).
 - Increase the number of students who are prepared to apply for distinguished national and international scholarships.
 - Expand outreach to graduate programs and potential employers (companies, non-profits, and government).
 - Link liberal arts and sciences education to career preparation through advising, curricular, and co-curricular initiatives, including ideas around co-locating or co-operating academic and career advising.
 - Enhance career preparation and networking opportunities for students, especially as they relate to student-alumni connectivity and networking.
4. More thoroughly analyze and understand strategic opportunities and limitations of online education (including hybrid approaches).
5. Engage in a more data-driven approach to evaluate and assess the quality of teaching, student engagement, and the overall campus environment.

Enhance the impact of research, scholarship, creative inquiry, and graduate education.

The UO will embrace a culture of excellence, both existing and enhanced. We will focus on hiring more faculty (especially tenure track, post docs, and researchers in strategic areas) and educating more graduate students to enhance UO's reputation as a preeminent comprehensive research university and enhance its standing among national peers. Investments in faculty will align with institutional priorities and be based on appropriate metrics. The UO will increase externally sponsored research, bolstering existing and interdisciplinary research, scholarship, and inquiry as well as enhancing doctoral programs and training.

STRATEGIES & INITIATIVES

1. Encourage a culture that promotes and enhances excellence.
 - Reallocate institutional funds to enhance excellence and align resources with teaching and research priorities.
 - Celebrate and reward excellence among faculty, students, and staff.
2. Increase the size of the tenure-related faculty by 80 to 100 members.
 - Develop hiring practices that emphasize current strengths and emerging areas of basic and applied research excellence.
 - Focus on hiring faculty with potential for making transformative contributions to scholarly research, scientific discovery, and creative practice.
3. Substantially increase externally-sponsored research support.
 - Enhance programmatic tools at the institutional, college, and unit levels to support those seeking externally-sponsored opportunities.
 - Leverage existing strengths and identify the best opportunities for new programs and initiatives to increase external support.
 - Engage in innovative partnerships for non-traditional sources of support.
 - Ensure that faculty obligations and responsibilities, such as teaching and research, align with institutional priorities.
 - Align hiring strategies with the priority of increased success in obtaining externally sponsored research awards and projects.

4. Increase the number of graduate programs ranked in the top 25%.
 - Make targeted investments in programs that can “go from good to great.”
 - Increase graduate student fellowship support, professional development, and post-graduation success.
 - Encourage, facilitate, and support new and transformative courses and programs.
 - Increase the number and diversity of Ph.D. students in areas of academic excellence.
 - Increase the number and diversity of graduate students in areas where prospects for fulfilling professional careers are bright.
 - Strengthen graduate program review processes to enable eventual expansion of successful programs and contraction of less successful programs.
 - Partner with regional research institutions (e.g., Oregon Health and Science University, Oregon State University, Pacific Northwest National Labs) in training graduate students and postdoctoral scholars.
5. Enhance the use of appropriate unit-level and institutional measures of quality, equity, and excellence (metrics) in decision-making and resource allocation.
 - Make assessments and critical discussion of results a routine part of governance at the UO—from units to the institution as a whole.
 - Promote the use of various field-specific metrics and best practices for effective decision-making.
6. Substantially increase support of research, scholarship, and creative inquiry.
 - Find new and effective ways to connect researchers with philanthropic funding opportunities through enhanced collaboration between researchers and development staff.
 - Strengthen existing partnerships, and explore new ones, to promote institutional teaching and research priorities, including the use of public-private partnerships.
 - Seek resources to provide research support for faculty including but not limited to seed and bridge funding, summer support, salary support for research leave, and project completion grants.
 - Strengthen and expand existing internal research award programs which provide support for faculty.

Attract and retain highly qualified, diverse students, faculty, and staff.

The UO will promote a campus culture and infrastructure within which all students, faculty, and employees can flourish. We seek greater diversity among the student body, faculty, and staff in order to ensure a meaningful and successful experience for all. The UO will ensure inclusive recruitment efforts; transparent, equitable, and navigable hiring and admissions processes; a welcoming environment that facilitates scholarship, creativity, collaboration, learning, personal advancement, success and, interdisciplinarity.

STRATEGIES & INITIATIVES

1. Recruit and foster the success of a highly-qualified and diverse student body.
 - Increase numbers of underrepresented students at the UO and engage in new tactics to recruit a diverse student body.
 - Compete for high-achieving and underrepresented students by increasing scholarship resources and by coordinating and strengthening UO pipeline programs.
 - Attract students from diverse backgrounds by increasing faculty and staff diversity.
 - Use the UO's emerging Portland presence to recruit more students from the greater Portland area.
 - Expand programs that provide students of limited means access to the UO and enhanced opportunities for successful and timely completion.
 - Create a stronger, more connected campus community by creating and supporting affinity groups.
 - Enhance diversity and global reach by recruiting top international students.
 - Study the benefits and feasibility of establishing cultural centers and programming for underrepresented students.
 - Effectively communicate the value of a UO experience and education.
2. Strengthen and expand active recruitment and retention of highly qualified and diverse faculty and staff through new strategies and relationships.
 - Instruct and train all search committees about the importance of diversity and how to create diverse pools of candidates.

- Develop strategic recruitment and hiring practices for faculty and staff that indicate a clear commitment to a highly qualified and diverse employee base.
 - Expand faculty hiring programs (e.g. dual-career programs, inter-institutional partnerships, the Initiative for Faculty Diversity, the Underrepresented Minority Program, and Target of Opportunity Program).
 - Establish and track measurable goals for increasing diversity.
 - Improve overall assistance to new faculty and staff, especially as it relates to making a transition to communities in Oregon less diverse than their previous communities.
 - Engage faculty in Eugene with programs and communities in Portland.
3. Create a campus culture that is supportive and responsive to the diverse needs and aspirations of students, faculty, and staff.
- Establish programs and opportunities through which students, faculty, and staff can share information and build networks within and across UO communities, and which foster a better understanding of the history and cultures of diverse populations.
 - Establish mechanisms through which the university can articulate its commitment to highly qualified, diverse students, faculty, and staff, including the use of a general Code of Conduct and through enhanced training.
 - Develop programs and processes that foster academic and professional success as well as opportunities for advancement for faculty and staff throughout the institution.
 - Improve and maintain campus resources and facilities in ways that attract highly qualified, diverse students, faculty, and staff.

Enhance physical, administrative, and IT infrastructure to ensure academic excellence.

The UO will wisely deploy or reallocate resources to maintain, enhance, and expand the infrastructure necessary to recruit, retain, educate, and serve students, faculty, and staff to promote the research mission of the university. Choices will be guided by the need to support intellectual inquiry, creativity, and scholarly communication in its myriad forms. Physical, administrative and IT infrastructure decisions will be based on alignment with the UO's mission and institutional priorities. Such decisions will also consider issues of accessibility, safety, efficiency, security, modernization, and flexibility.

STRATEGIES & INITIATIVES

1. Develop a university-wide resource allocation system that will provide incentives for excellence, promote stability, and ensure that units are aligned with university priorities.
2. Ensure that UO's planning process and vision for its physical infrastructure includes long-term planning and ongoing assessment of needs for classrooms, faculty offices, and areas to house student support services, as well as for preserving the beauty and functionality of the campus.
 - Develop and implement planning—and increased funding—to address deferred maintenance needs.
 - Develop and implement an IT strategic plan that will be informed by institutional and unit needs, but that will also conserve resources, reduce waste and redundancy, and ensure security and excellent service.
3. Address immediate infrastructure needs to accommodate current and future enrollment and protect existing assets.
 - Develop and implement planning—and increased funding—to address deferred maintenance needs.
 - Develop and implement an IT strategic plan that will be informed by institutional and unit needs, but that will also conserve resources, reduce waste and redundancy, and ensure security and excellent service.
4. Renovate and repurpose current assets to ensure longer building life, ensure accessibility, and improve space utilization.
 - Complete a housing renovation plan that will provide necessary and desired upgrades to student campus housing.
 - Maintain an accessible physical campus and provide up-to-date adaptive technology and interpretive support.
5. Build assets to support strategic objectives.
 - Develop new, outstanding research and teaching spaces focused on institutional priorities, including new research laboratory buildings.

- Add facilities necessary to meet faculty and student demand, and develop a comprehensive plan to address future growth.
 - 6. Continually assess underlying assumptions and guiding principles regarding infrastructure and administrative services, especially as they relate to a more digital world.
 - Support and enhance core research facilities (including the library).
 - Identify opportunities to rationalize facilities, infrastructure, and services by eliminating or condensing units, outsourcing appropriate programming and services, leveraging shared services with other entities, and where appropriate facilitating suitable telework.
 - Devise and implement processes, policies, and resource allocations that will promote economies of scale and more centralized services where appropriate.
 - Ensure that infrastructure plans and priorities are driven from the point of view of end users, especially given the diverse community and needs across campus.

-END-

THANK YOU to the many task force members who helped shape this strategic framework...

Yvette Alex-Assensoh – vice president, Equity and Inclusion; professor, Political Science
Susan Anderson – professor, German Scandinavian Studies
Andy Berglund – interim dean, Graduate School
Deanna Berglund – grants/contracts coordinator, Institute of Molecular Biology
Doug Blandy – senior vice provost, Academic Affairs; professor, Arts and Administration
Jim Bouse – director of technology for OEM; associate registrar for technology, Office of the Registrar
Ron Bramhall – associate vice provost, Academic Affairs; senior instructor I, Business
Frances Bronet – Acting Senior Vice President and Provost; professor, Architecture
Kayleigh Catron Frater – graduate student, PPPM
Endalkachew Chala – graduate student, Media Studies
Helen Chu – director, Academic Technology
Lauradel Collins – analyst programmer 2, Computer and Information Science
Angela Davis – associate professor, Accounting
Vickie De Rose – professor, Chemistry and Biochemistry
Alexandre Dossin – professor, Music
Daniel Dugger – professor, Mathematics
Deborah Exton – senior instructor II, Chemistry and Biochemistry
Michael Fakhri – assistant professor, Law
Karen Ford – associate dean, Humanities; professor, English
Lisa Freinkel – vice provost, Undergraduate Studies; associate professor, English
Dennis Galvan – vice provost, International Affairs; professor, International Studies
Fritz Gearhart – professor, Music
John Gillies – undergraduate student, Biochemistry
Brian Gillis – associate professor, Art
Amalia Gladhart – professor, Romance Languages
Sandra Gladney – executive director, Academic Extension
Karen Guillemin – professor, Biology
Esther Hagenlocher – associate professor, Architecture
Gordon Hall – professor, Psychology
Michael Hames-Garcia – professor, Ethnic Studies
Robin Holmes – vice president, Student Life
Rob Horner – professor, Educational and Community Supports
Terry Hunt – dean, Clark Honors College; professor, Clark Honors College
Marty Hurst – administrative program assistant, Educational and Community Supports
Jane Irungu – director, Center for Multicultural Academic Excellence
Randy Kamphaus – dean, College of Education; professor, School of Psychology
Moira Kiltie – associate vice president and chief of staff, Research and Innovation
Robert Kyr – Senate President; professor, Music
Matika Levy – undergraduate student, Political Science
Adriene Lim – dean, UO Libraries; senior librarian
Laura Lindstrom – associate professor, Counseling Psychology and Human Services
Barbara Marbury – program coordinator, Equity and Inclusion
Andrew Marcus – interim dean, College of Arts and Sciences; associate dean, Social Sciences
Colleen McKillip – executive assistant, School of Journalism and Communication
Ian McNeely – associate dean for undergraduate education, College of Arts and Sciences; professor, History
Casey Minter – undergraduate student, Journalism
Jamie Moffitt – vice president, Finance and Administration
Brook Muller – interim dean, School of Architecture and Allied Arts
Kara Nell – graduate student, Chemistry
Nicole Nelson – ASUO administrative assistant/office coordinator, Division of Student Life
Chris Ramey – associate vice president, Campus Planning and Real Estate
Brad Shelton – interim vice president, Research and Innovation; vice provost, Budget and Planning
Gretchen Soderlund – associate professor, Media History
Greg Stripp – chief of staff/senior advisor to President, President's Office
Richard Taylor – professor and director, Physics
Roger Thompson – vice president, Enrollment Management
Mark Unno – associate professor and department head, Religious Studies
Dean Walton – science and technology outreach librarian, UO Libraries
Melissa Woo – vice provost and chief information officer, Information Services



Agenda Item #3

Presidential Goals and Evaluation

GOALS FOR YEAR 1

- Finalize a strategic framework for the university, which will dynamically describe the academic vision and its philosophical underpinnings.
- Hire – or make significant progress toward hiring – additional tenure track faculty consistent with the academic plan.
- Hire new leadership team members as required.
- Develop a strategic communications plan for both internal and external communication.
- Develop and begin implementation of a pilot leadership training program for department chairs.
- Reorganize the President's and the Provost's offices.
- Establish a development *philosophy, strategy and plan* for the UO.
- Seek to raise \$120-150 million in gifts and pledges for *academics*.
- Develop a plan for assessing the effectiveness and efficiency of key central administrative services.
- Develop a strategy for the UO's presence, activities and operations in Portland.
- Successfully complete labor negotiations and implement a new CBA with the faculty union.
(This goes for classified staff as well, but that is a goal among all seven presidents.)

Permeating all of the president's goals and initiatives should be a focus on diversity, equity and inclusion at the UO. This should include a look at potential statistical improvements (such as the number of underrepresented faculty and students), as well as a look at cultural improvements across campus.

There are, of course, many other objectives that deserve pursuit in year 1. For example, improving faculty and employee morale; continued refinement and focus of our prioritized academic programs as identified in the academic plan; promoting a more stable, respectful and productive relationship between the administration and the University Senate; building personal relationships with key state political and opinion leaders; and developing and maintaining a good working relationship with the board of trustees.

LONG-TERM GOALS

- Improve the graduation rate.
- Improve overall faculty and research excellence.
- Increase financial support for students.
- Engage in planning, decision making and budgeting that continually raises the quality of our academic programs and students.
- Improve UO's performance on AAU metrics.
- Successfully complete a \$2B campaign.
- Create a more sustainable financial model for the university.
- Ensure appropriate athletic accountability to and coordination with the President.
- Develop and execute a plan to address information technology needs.
- Complete the review and revision of all university policies.

Overview

In September 2014, the Board adopted an internal policy regarding presidential review and evaluation. The policy notes that a “well-defined and timely process” are important, as are “objectivity [and] candor.” It is also worth noting that the policy also states that any formal evaluation process does not preclude ongoing informal feedback loops and evaluative efforts.

After executing the policy for the first time in 2015, the Chair and Vice Chair of the Board propose certain changes to the policy to improve the process and its management. The redline version is attached to the resolution as Exhibit A. Below is a summary of proposed changes.

Proposed Changes

Section 2.1: Timeline for Annual Review

Proposed changes remove the specific March 1 thru June 30 timeframe and replaces the specific timeframe with language that allows the chair and vice chair to determine a timeframe each year, taking into consideration of the academic calendar and meetings of the Board. The language notes that this would typically fall between May and September, but it preserves some flexibility. This ensures more appropriate consideration of the academic calendar and the end of year time frame that correlates to the timing of presidential goals and objectives.

Section 2.2: Timeline for Comprehensive Review

For similar reasons as above, proposed changes remove the specific May 1 thru July 31 timeframe. This language is replaced with language allowing the chair and vice chair to determine the appropriate timeframe for the evaluation.

Section 3.0: Responsible Committee

Proposed changes the responsible committee for this work from the Presidential Factors Committee and puts the responsibility of the evaluation within the Executive and Audit Committee.

Section 4.2: Feedback

Proposed changes replace the very prescriptive “survey” with more general “feedback”. The use of “survey” implied a particular response tool or mechanism, which may or may not be appropriate any given year. This section also adds trustees and presidential direct reports to required participants. It removes the term “officers” as all officers are either vice presidents or direct reports.

Amendments to the Policy on Board Committees

The UO has a Policy on Board Committees that governs the structure and scope of work for board committees. If the change to section 3.0 as articulated above (removal of Presidential Factors Committee), it makes sense to also amend the Policy on Board Committees to officially eliminate that committee.

One of the most important responsibilities of the Board is to evaluate and support the president. This document seeks to articulate the plan for the 2016 annual evaluation of President Michael H. Schill. It therefore focuses only on the requirements pertaining to the **annual evaluation**.

POLICY STIPULATIONS – AS PROPOSED

In September 2014, the Board adopted an internal policy regarding presidential review and evaluation.¹ The policy notes that a “well-defined and timely process” are important, as are “objectivity [and] candor.” It is also worth noting that the policy also states that any formal evaluation process does not preclude ongoing informal feedback loops and evaluative efforts.

After executing the policy for the first time in 2015, the Chair and Vice Chair of the Board propose certain changes to the policy to improve the process and its management.² This outline reflects an evaluation plan for 2016 assuming passage of the proposed changes.

TIMING

The policy articulates that there shall be an annual review at a time specified by the Chair and Vice Chair. For 2016, the Chair and Vice Chair suggest that the process begin in early May (while school is still in session) with a final report to the Board due at the September meeting.

MANAGEMENT

The evaluation will be managed and executed by the Executive and Audit Committee, which may in turn designate a member (or members) to facilitate, gather and disseminate information. For 2016, the Chair proposes that the Vice Chair again take the lead in facilitating information flow.

COMPONENTS

1. A **self-assessment** with a retrospective and a prospective component. [Required]
2. **Feedback** from trustees, vice presidents, deans and the President’s direct reports. [Required]
3. Solicitation of other information and material from members of the university community and, where appropriate, external constituencies. [Optional]

REPORTING

A **summary report** shall be presented at the first regular meeting of the Board following completion of the review (anticipated September 2016). Prior to the completion of this report, the Chair and Vice Chair – along with any other appropriate trustee(s) – will meet with the President regarding the evaluation.

PRIVACY

Information collected will be shared with the President, though not necessarily by name or in an identifiable fashion. All materials are considered faculty personnel records and are thusly protected.

¹ http://trustees.uoregon.edu/sites/trustees2.uoregon.edu/files/presidential_review_091114_approved.pdf

² A redline version is available in this packet, attached to the resolution as Exhibit A.

Board of Trustees of the University of Oregon

Resolution: Amendments to Presidential Review Management and Processes

Whereas, evaluating the president of the University of Oregon ("President") is one of the most important responsibilities of the Board of Trustees ("Board") and is non-delegable;

Whereas, certain changes to the Board's policy on Presidential Review and Evaluation are necessary to ensure a better processes and outcomes;

Whereas, the President, the Board and the University as a whole will benefit from a routine and improved evaluation process;

Whereas, the Board believes it is no longer necessary to have a standing committee to address presidential matters and that the Executive and Audit Committee can manage such items (e.g. evaluation, compensation);

Now, therefore, the Board of Trustees of the University of Oregon hereby amends the Presidential Review and Evaluation Policy as articulated in Exhibit A, attached hereto; and approves associated amendments to the Policy on Committees as articulated in Exhibit B, attached hereto.

Moved by _____

Seconded by _____

Trustee	Yes	No
Ballmer		
Bragdon		
Chapa		
Colas		
Curry		
Ford		
Gary		
Gonyea		
Kari		
Lillis		
Paustian		
Ralph		
Wilcox		
Willcox		

Dated: _____

Initials: _____

Resolution: Amending the presidential review policy and the policy on committees

March 4, 2016

Page 1

Page 27 of 66

Exhibit A

Proposed Presidential Review & Evaluation Policy (Redline)

The Board of Trustees of the University of Oregon (the “Board”) will evaluate the university President on a regular basis to facilitate clear communication, reflect best practices and promote the effective execution of the University’s strategic plans. To accomplish this, the Board, its committees and its members shall adhere to the following Policy on Presidential Review and Evaluation:

1.0 Guiding Principles

- 1.1 Evaluating the President is a non-delegable responsibility of the Board of Trustees. While various viewpoints will be solicited and considered, the Board must take direct responsibility for the evaluation.
- 1.2 A review of the President should be based on the University’s values and the objectives set forth in its mission, goals and strategic plans.
- 1.3 Objectivity and candor, as well as a well-defined and timely process, are critical to an effective evaluation.
- 1.4 Nothing in the establishment of annual or comprehensive review policies and processes should imply that informal, ongoing evaluations cannot, should not or will not occur; ongoing, reciprocal communication between the President and the Trustees is important to effective governance of the University.

2.0 Timelines

- 2.1 Annual Review – The Board shall undertake a performance evaluation of the President on **at least** an annual basis (the “Annual Review”). The Annual Review shall take place **between March 1 and June 30**, **during a timeframe specified by the Chair and Vice Chair of the Board, with consideration of the academic calendar and meetings of the Board**. **Typically, this timeframe would fall between May and September.**
- 2.2 Comprehensive Review – The Board shall undertake a comprehensive evaluation and review (the “Comprehensive Review”) at least every five years **of a president’s tenure during a timeframe specified by the Chair and Vice Chair of the Board, with consideration of the academic calendar and meetings of the Board**. **The Comprehensive Review shall take place between May 1 and July 31 after every fifth completed year fiscal year, or fraction thereof, of the President’s tenure.**

3.0 Committee

The Board shall establish a Presidential Factors Committee Executive and Audit Committee or its designee(s) (“the Committee”) for purposes of shall be responsible for managing and executing this Policy.

Resolution: Amending the presidential review policy and the policy on committees

March 4, 2016

Page 2

4.0 Components of the Annual Review

- 4.1 President's Annual Self-Assessment – The President shall complete an annual self-evaluation, due to the Board at a date specified by the Chair. The self-evaluation shall include a retrospective component and a prospective component as described below.
- 4.1.1 The *retrospective* portion will customarily include, but is not limited to: institutional achievements and the President's role(s) therewith; assessment of the President's relationships with the Board, university leadership, and other key stakeholders; a review of goals previously established under Section 6.0 of this policy and progress made toward those goals; and identification of significant institutional or personal challenges faced throughout the preceding year, with particular focus on those likely to persist into the future.
- 4.1.2 The *prospective* portion will customarily include, but is not limited to: goals the President proposes for him/herself and the University over the course of (i) the next year and (ii) the next five years; professional development plans or objectives; an assessment of the University's primary opportunities, challenges, strengths and needs, especially as those items relate to the University's strategic plan; and areas in which the President seeks the Board's assistance.
- 4.2 ~~Presidential Review Survey – The following persons will evaluate the President through completion of an annual Presidential Review Survey ("Survey"): Vice Presidents, Academic Deans, and Officers of the University. The committee may, at its discretion, ask other persons to complete the Survey. The survey shall be developed annually by the Committee and shall be administered by the Secretary. The Survey shall be completed and results shared with the Board and the President according to a timeline specified by the Board in accordance with the requirements of Section 2.0.~~
- ~~Presidential Review Feedback – The Committee (or designee) shall solicit feedback from trustees, vice presidents, the President's direct reports, and academic deans. The Committee (or designee) may, at its (their) discretion, ask other persons to provide feedback. The feedback shall be shared with the Board and the President in accordance with the requirements of Sections 2.0 and 8.0.~~
- 4.3 Solicitation of Other Information and Material – The Committee (or designee) shall solicit information on the President's performance from other members of the university community and, where appropriate, external constituencies. Nothing in this section is meant to imply an obligation by the Board or any committee of the Board to solicit or accept information or material from any particular individual, organization or position. All material collected or obtained shall be provided to the President.

5.0 Components of the Comprehensive Review

Prior to the commencement of each Comprehensive Review, the Committee (or designee) shall establish the components and related processes not otherwise specified in this Policy by which the Comprehensive Review shall be administered. The Comprehensive Review shall supplement, and not replace, the Annual Review.

6.0 Reporting

- 6.1 Annual Review – Following the completion of each Annual Review, the Committee (or designee) shall prepare a report summarizing its findings and any associated recommendations, goals or action items for the President, the Committee and/or the Board. Such findings and recommendations may include consideration of presidential compensation. This report shall be presented to the Board at the first regular meeting of the Board following completion of the Annual Review.
- 6.2 Following the completion of each Comprehensive Review, the Committee (or designee) shall prepare a report summarizing its findings and any associated recommendations, goals or action items for President, the Committee and/or the Board. This report shall be presented to the Board at the first regular meeting of the Board following completion of the Comprehensive Review.

7.0 Establishment of Goals and Expectations

Upon completion of the Annual Review, but not later than thirty (30) days following the Board's acceptance of the report required in section 6.1, the Committee, in consultation with the Board Chair and the President, will establish and memorialize in writing the President's performance goals and expectations for the upcoming year.

8.0 Confidentiality

Oregon law governs the confidentiality of the President's review(s) and related materials. Evaluative information shall be received and maintained in a manner that is consistent with the personnel records standards outlined in ORS 351.065 and associated University policies.

Exhibit B

Proposed Amendments to the Policy on Board Committees (Red-Lined Version)

1.0 Executive and Audit Committee

1.1 There shall be a six-member Executive and Audit Committee (EAC) of the Board of Trustees, which shall sit as the Executive Committee of the Board and the Audit Committee of the Board. The Chair and Vice Chair of the Board and the chairs of the Academic and Student Affairs Committee and the Finance and Facilities Committee shall each be an ex officio voting member of the EAC, and the Chair of the Board shall select the fifth voting member. The Chair of the Board shall be the chair of the committee. During the absence or incapacity of the Chair, the Vice Chair shall be the chair. During the absence or incapacity of the Chair and the Vice Chair, the chair of the Finance and Facilities Committee shall be the chair.

1.2 When sitting as the Executive Committee, the EAC shall represent and may act for the Board, except as prohibited by applicable law or policy. The committee should generally endeavor to refer matters to the Board, but it is expected that the committee will act for the Board when the committee determines it to be necessary or appropriate. The committee shall submit reports on its actions to the Board.

1.3 When sitting as the Audit Committee, the EAC may consider matters pertaining to audits, compliance,~~and~~ risk management, and the presidency. Matters that may be brought before the committee include, but are not limited to, the following examples:

1.3.1 Audits and Internal Controls—matters relating to external and internal auditors, audit plans and reports, and internal controls.

1.3.2 Compliance—matters relating to compliance with legal and regulatory requirements.

1.3.3 Risk Management—matters relating to risk management, insurance, and risk transfer devices.

1.3.4 The Presidency—matters relating to the evaluation, compensation or position of the presidency.

All matters considered pursuant to this section 1.3 by the EAC sitting as the Audit Committee that require action by the Board shall be referred to the Board as a seconded motion unless authority to act on behalf of the Board has been delegated expressly to the EAC. Subsequent to the transaction of any business under such express delegated authority, the committee shall render a report on the business to the Board.

Any of the examples of matters brought before the EAC sitting as the Audit Committee pursuant to this section 1.3 may be directed to any other committee or the Board for consideration.

2.0 Academic and Student Affairs Committee

Resolution: Amending the presidential review policy and the policy on committees

March 4, 2016

Page 5

2.1 There shall be a seven-member Academic and Student Affairs Committee (ASAC). At the Board's second regular meeting of each even-numbered calendar year or such other time as determined by the Board, the Board Chair shall appoint the chairperson and other members of the ASAC. The Chair and Vice Chair of the Board shall not be appointed to the ASAC but may act as alternates, including voting, in the event of the absence of any committee member at any regular, special or emergency meeting.

2.2 All matters considered by the ASAC that require action by the Board shall be referred, as appropriate, to the Board or the Executive Committee for action as a seconded motion unless authority to act on behalf of the Board has been delegated expressly to the ASAC. Subsequent to the transaction of any business under express delegated authority, the ASAC shall render a report on the business to the Board.

2.3 The ASAC may consider matters pertaining to the teaching, research, and public service programs of the University and to its faculty, staff, and students. Matters that may be brought before the Committee include, but are not limited to, the following examples:

2.3.1 Faculty and Staff Affairs—matters relating to the faculty and the professional and classified staff, including their status and responsibilities, discipline and welfare.

2.3.2 Educational Policy—matters relating to educational policy, including admissions requirements, instruction, curriculum, degrees, research, educational technology, distance learning, public services activities, and the establishment and disestablishment of educational and research organizational units.

2.3.3 Student Welfare—matters relating to the general welfare of students, including housing and food services, health services and health insurance, safety, extracurricular activities, sports programs, and policies governing student discipline and student organizations.

Any of the above enumerated examples of matters brought before the ASAC may be directed to any other committee or the Board for consideration.

3.0 Finance and Facilities Committee

3.1 There shall be a seven-member Finance and Facilities Committee (FFC). At the Board's second regular meeting of each even-numbered calendar year or such other time as determined by the Board, the Board Chair shall appoint the chairperson and other members of the FFC. The Chair and Vice Chair of the Board shall not be appointed to the FFC but may act as alternates, including voting, in the event of the absence of any committee member at any regular, special or emergency meeting.

3.2 All matters considered by the FFC that require action by the Board shall be referred, as appropriate, to the Board or the Executive Committee for action as a seconded motion unless authority to act on behalf of the Board has been delegated expressly to the FFC. Subsequent to the transaction of any business under express delegated authority, the FFC shall render a report on the business to the Board.

3.3 The FFC may consider matters pertaining to the financial, capital, and other assets of the University. Matters that may be brought before the Committee include, but are not limited to, the following examples:

3.3.1 Budget—matters relating to the University's operating and capital budgets and requests for appropriation of state funds.

3.3.2 Investments and Finances—matters relating to the University's investments, finances, financial accounts, and debt finance.

3.3.3 Tuition and Fees—matters relating to tuition and mandatory enrollment fees.

3.3.4 Real Property—matters related to the acquisition, management, development and disposal of real property.

3.3.5 Personal Property—matters related to the acquisition, management, development and disposal of personal property, tangible and intangible.

Any of the above enumerated examples of matters brought before the FFC may be directed to any other committee or the Board for consideration.

4.0 Presidential Factors Committee

~~4.1 There shall be a five member Presidential Factors Committee (PFC) of the Board of Trustees. The Chair of the Board (the "Chair") shall select one member to be the chair of the PFC and four additional members at such a time as determined by the Chair. During the absence or incapacity of the chair of the PFC, the Chair of the Board shall select one of the other committee members to be the interim chair. The President of the University (the "President") may not be a member of the PFC.~~

~~4.2 The PFC shall consider matters pertaining to the recruitment, retention, resignation, evaluation and compensation of the President. Matters within the Committee's purview or that may be brought before the PFC include, but are not limited to the following examples:~~

~~4.2.1 Presidential Performance & Expectations—matters relating to the evaluation of presidential performance and setting of goals and expectations for the President.~~

~~4.2.2 Presidential Compensation—matters relating to the President's salary, benefits, housing or any other compensation-related items.~~

~~4.2.3 Presidential Contract—matters relating to the formation, amendment, breach, enforcement, or review of the President's contract with the University.~~

~~4.3 All matters considered by the PFC that require action by the Board shall be referred, as appropriate, to the Board or the Executive and Audit Committee for action as a seconded motion unless authority to act on behalf of the Board has been delegated expressly to the PFC. Subsequent to the transaction of any business under express delegated authority, the PFC shall render a report on the business to the Board.~~

~~Any of the above enumerated examples of matters brought before the PFC may be directed to any other committee or the Board for consideration.~~

Resolution: Amending the presidential review policy and the policy on committees

March 4, 2016

Page 7

4.05.0 Special Committees

Special committees may be established and appointed by the Chair of the Board with the concurrence of the Executive Committee or the Board, and with such membership, powers and duties as the Executive Committee or the Board may determine.

5.06.0 Notice of Meetings of Committees

Meetings of committees of the Board shall be held at such times and places as may be fixed by each committee or its chairperson. The Secretary of the University shall give each member of the Board notice of committee meetings in sufficient time and manner to allow attendance at the meetings. Notice of meetings that are subject to the Oregon Public Meetings Law shall be given in accordance with the Public Meetings Law. The committee shall provide for the taking of written minutes of all Public Meetings, which minutes shall give a true reflection of the matters discussed and actions taken at the Public Meetings and the comments of the participants. In addition to written minutes, the committee may provide for an audio recording of a Public Meeting.

6.07.0 Quorums

A majority of the members of a committee shall be necessary to constitute a quorum. The faculty and nonfaculty staff members of a committee may not participate in any discussions or action by the committee or attend any executive session of the committee involving collective bargaining issues that affect faculty or nonfaculty staff at the university.



Agenda Item #4

Capital Campaign and University Advancement Update



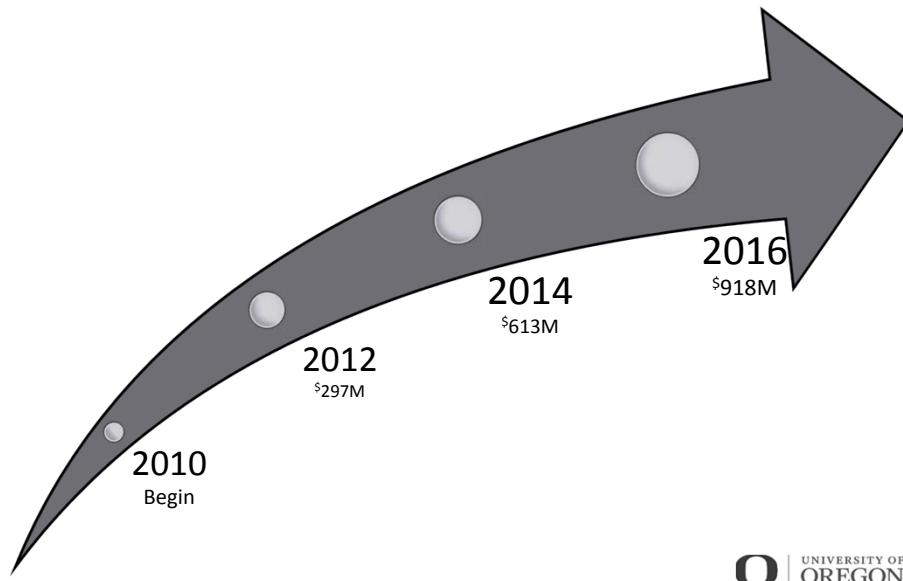
Campaign Update

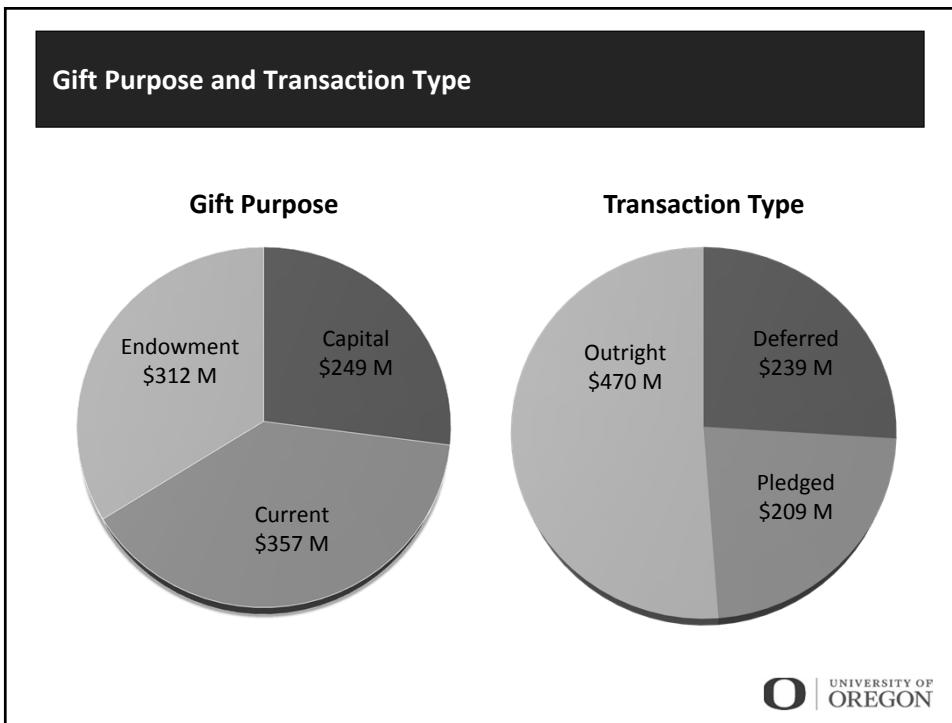
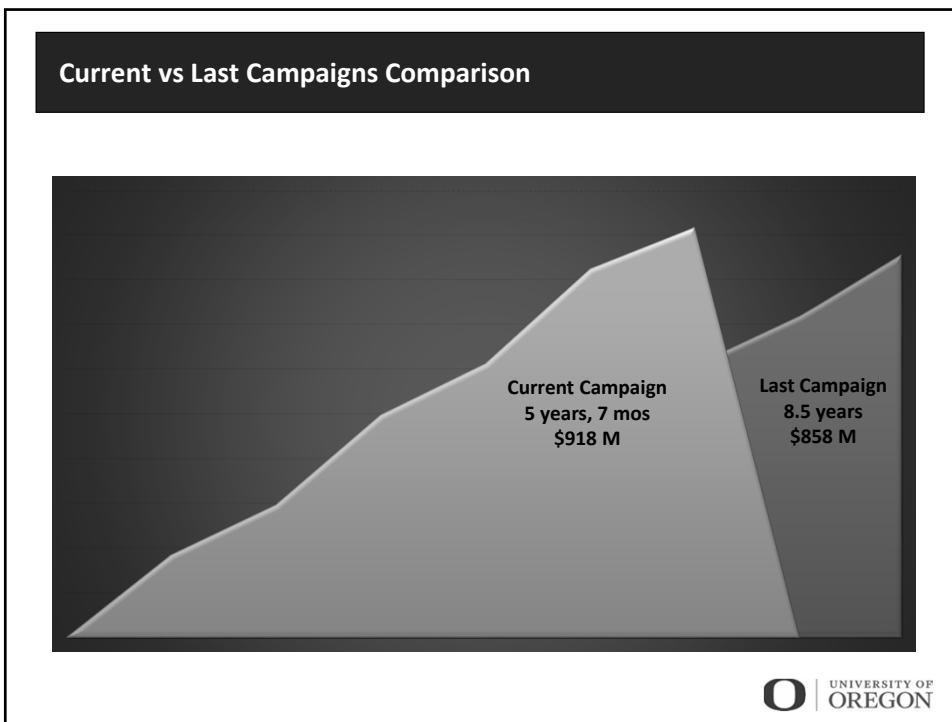
March 4, 2016

Presenter: Mike Andreasen

Board of Trustees of the University of Oregon

Campaign Growth and Goal





Campaign Donors by Gift Level
7/1/2010 – 1/31/2016

Level	Amt	Pct	Donors	Pct
\$10M+	\$307,355,828	33.48%	8	0.01%
\$1M-\$9.9M	\$336,009,427	36.60%	150	0.20%
\$100K-\$999K	\$147,600,035	16.08%	551	0.74%
\$25K-\$100K	\$53,508,733	5.83%	1,226	1.64%
<\$25K	\$73,549,299	8.01%	72,835	97.41%
Total	\$918,023,322	100.00%	74,770	100.00%



Campaign Update

March 4, 2016

Presenter: Mike Andreasen

Board of Trustees of the University of Oregon



Agenda Item #5

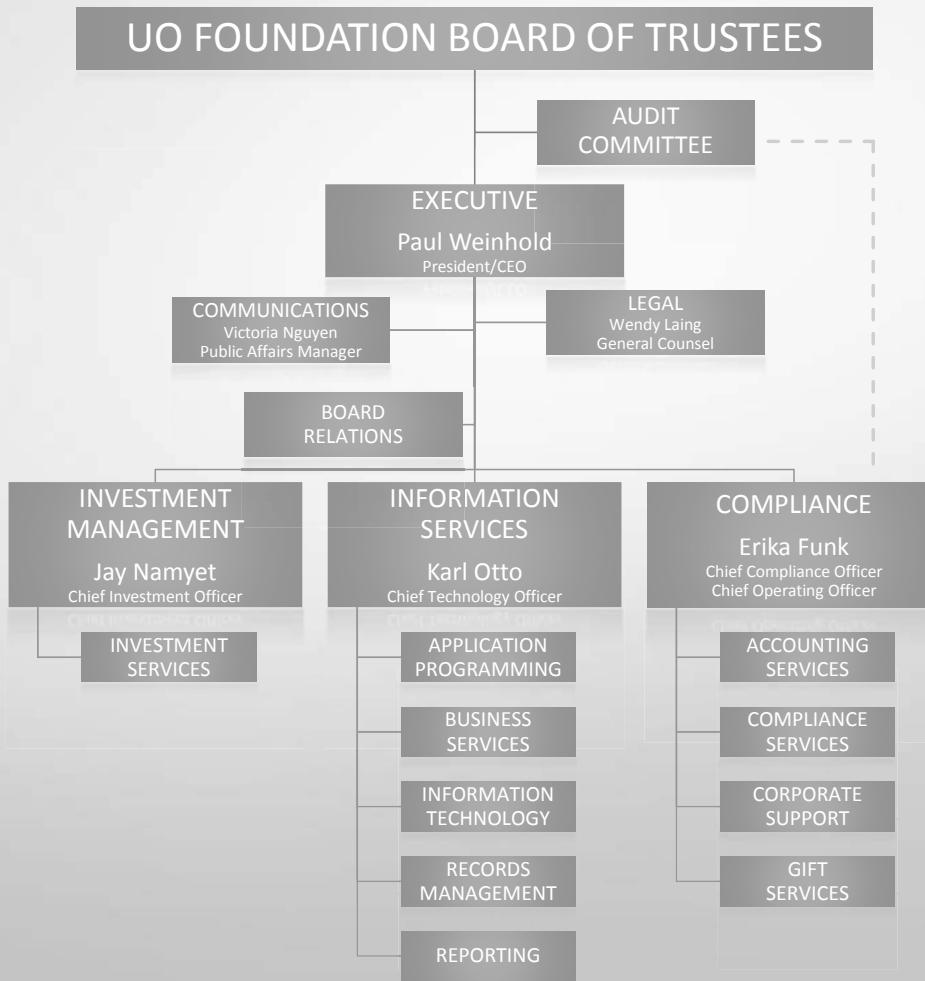
University of Oregon Foundation Overview

Paul Weinhold
President/CEO

Paul has served as the President and CEO of the University of Oregon Foundation since 2009. He is a 1986 UO graduate and recipient of the Scholar Athlete Award. As a member of the UO golf team, he was named an honorable mention All-American in 1983. The University of Oregon honored him with the Leo Harris Award in 2006. The award is given to an alumnus letterman who has been out of college at least 20 years and has demonstrated continued service and leadership to the university.

A Eugene resident of more than 30 years, Paul has been actively engaged with numerous local nonprofit boards. He is a member of the founding board of Summit Bank, and currently serves as chair.

Organizational Chart





Agenda Item #6

Information Technology Strategic Planning

IT Strategic Planning

March 4, 2016



IT Strategic Planning Process

- Have engaged external consultants to inform our work
 - Baker Tilly: Risk Assessment
 - Moran Technology Consulting: Strategic Plan
- Established a steering committee and 3 work groups to make recommendations on priorities and governance
 - IT Investments
 - Leveraging Resources
 - Governance



Where We Are . . .

3

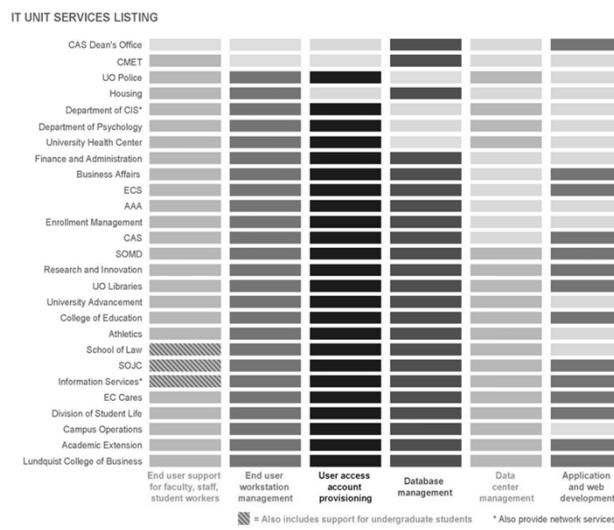
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Decentralized Model

IT responsibilities and services are:



- Distributed in over 27 units across campus
- Carried out by more than 250 FTE
- Funded by an annual investment of more than \$34 million (*including costs such as salary, hardware, software, and services*)
- Not governed by a central authority



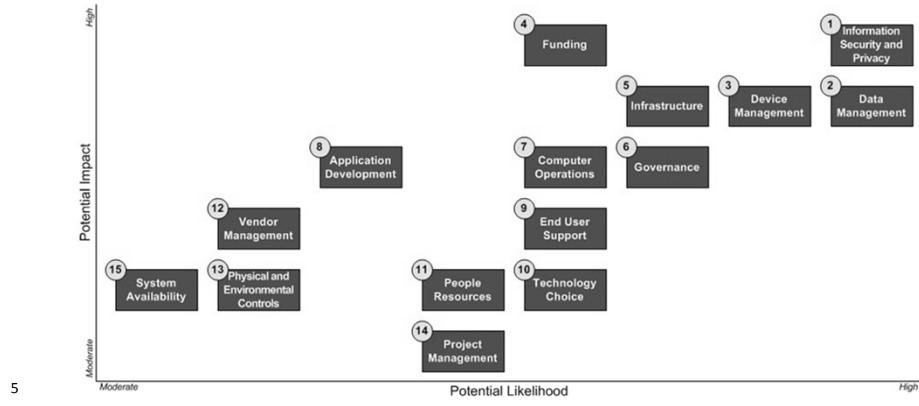
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Risks Faced by the University



IT Risks

Oregon faces many IT threats as a higher education institution managing multiple networks and systems, and providing IT services to thousands of faculty, staff, students, and other constituents. The risk map below depicts the specific risk areas for Oregon prioritized by the potential impact and likelihood. The placement of the risks on the risk map was based on criteria tailored to Oregon for potential impact and likelihood. The rating of risks was based on judgment, and the criteria were purposely not weighted equally or applied uniformly across the risk areas. Impact was based on reputational, financial, operational, and compliance factors, while likelihood was based on potential timing of occurrence in the short, medium, or long timeframe. The descriptions of each area are listed on the following pages. It is important to note that these areas do not necessarily represent problems, but are risks inherent to Oregon's operations and the environment in which it operates.

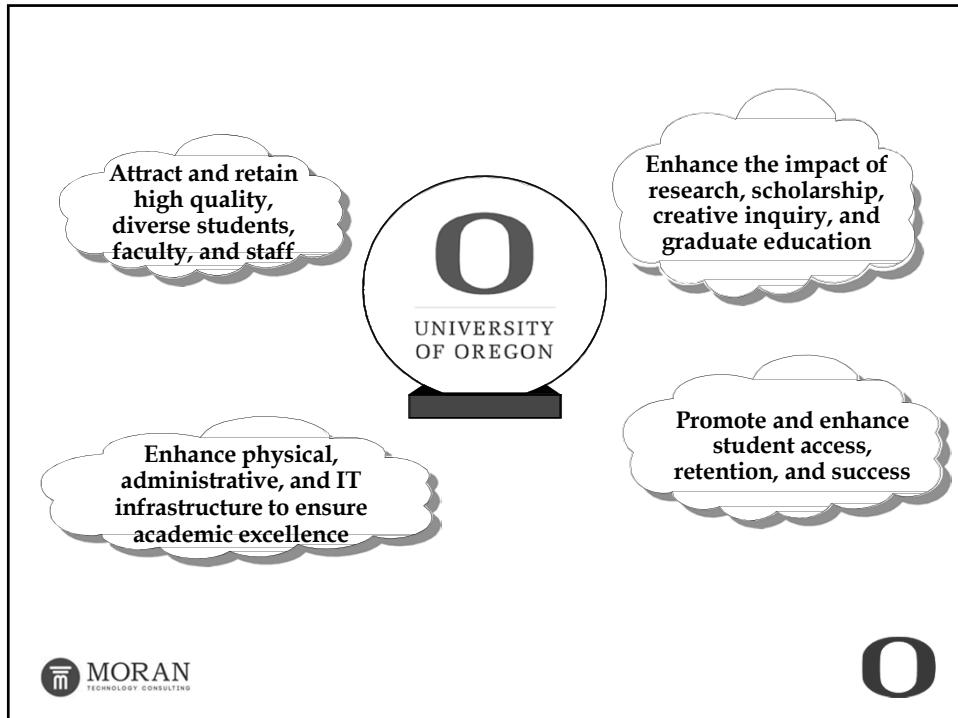


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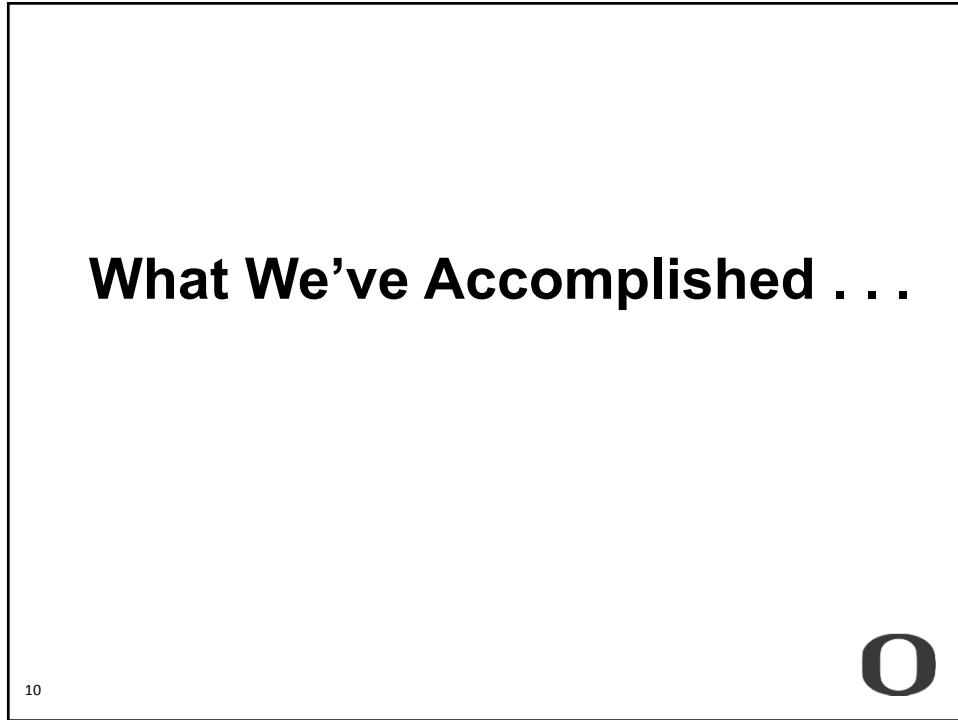
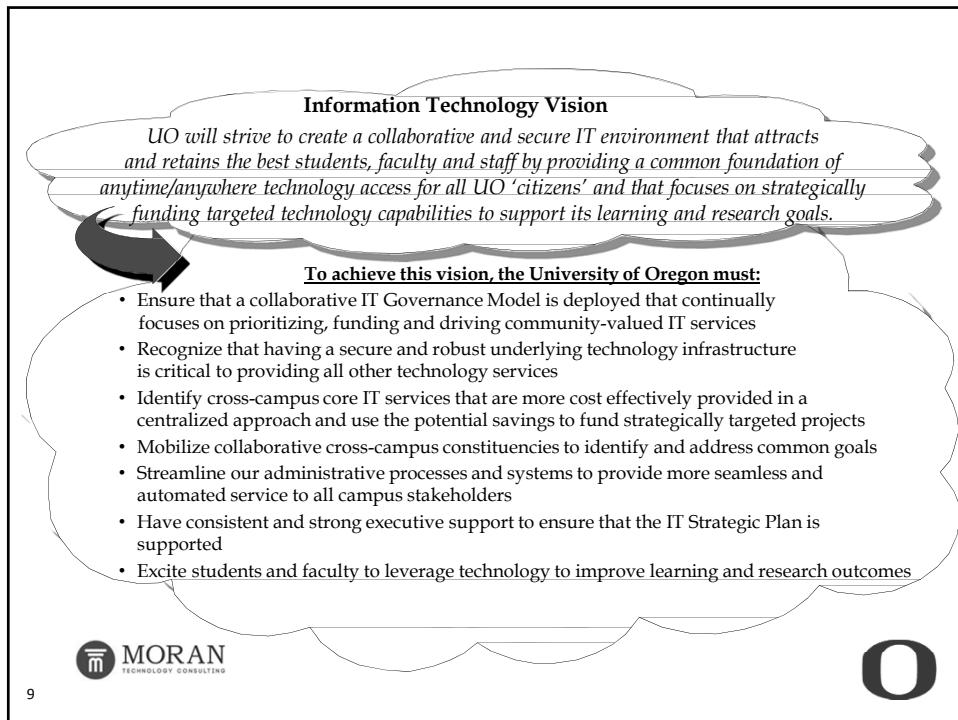
Where We Want To Be . . .

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6



How We Get There . . .



Strategic Planning

Steering Committee: CIO, Vice President for Finance and Administration, Interim Vice President for Research, 4 Deans, 2 IT Directors, Assistant Vice President for Financial Aid, Associate CIO for Customer Experience, Associate Vice President for Research

Work Groups: Membership comprised of steering committee members as well as additional faculty and staff with expertise in management, strategic planning, or IT

	Charge
Technology Investments	Develop recommendation for strategic investments with a funding range of \$2.75-\$4 million
Leveraging Resources	Make recommendations for consolidation & integration of functions & services
IT Governance	Develop an IT governance model that will select, prioritize, and provide oversight on major technology investments & policies

11



Central Information Services

New Management Structure

(See Appendix A for bios)

- **Interim CIO: Chris Krabiel**
- **Infrastructure Lead: Joe Sventek**
 - Will lead a full assessment of campus infrastructure and present recommendations for funding based on risks and strategic investments
- **Staff Management Lead: Miriam Bolton**
 - Will provide support for staff during the transition
- **Consolidation Lead: Harvey Blustain**
 - Will lead an assessment of all IT units/functions around campus and make recommendations for appropriate consolidation/coordination

12



Governance

The mission of IT:

- Provide services that are critical to the front-line mission of the institution: teaching and research
- Provide important services directly to all students
- Provide services that are critical to all of the other services that are directly or indirectly supporting the mission of the institution (e.g., business operations, academic and student support, research operations, auxiliaries, data security)

Why do we need a robust and formal IT Governance model?

1. IT resource needs will always outstrip available resources, thereby requiring strategic prioritization of how resources are deployed, within the context of the mission of the institution
2. IT security, business continuity and compliance needs require sensible and enforceable policies that support, rather than unduly interfere with, the mission of the institution
3. Appropriately balancing central and local IT activities requires frequent recalibration
4. As remarked above: **every** member of the University community (student, faculty, staff) is a direct stakeholder in the success of our IT enterprises

13



Governance

Governance Committee

- Advises the Provost on all matters relating to IT including:
 - Creating, revising, maintaining, and implementing IT policies
 - Prioritizing use of available resources
 - Overseeing campus technology working groups

IT Directors Committee

- Advises the CIO on IT operations and needs including:
 - Coordinating activities to improve efficiency and avoid duplication
 - Sharing best practices
 - Collaborating on innovative ideas
 - Leveraging the use of local and central resources and infrastructure

14



Governance

New Governance Committee Membership

Appointed by the Provost

- Two Co-Chairs: CIO + an additional co-chair appointed by the Provost from the membership listed below
- One Vice Chair (to be appointed by the Provost from the membership listed below)
- Five Faculty members
- Two Deans
- One representative of the Library
- One representative from the Office of the Provost
- One representative from the Office of the Vice President for Research & Innovation
- One representative from University Advancement
- One representative from the Office of the Vice President for Enrollment Management
- One representative from the Office of the Vice President for Student Life
- One representatives from the Office of the Vice President for Finance and Administration
- Two members at large (as desired)

All representatives must be at the level of Assistant Vice President/Provost or Associate Dean or higher.

15



Governance

Governance Committee Activities

- Evaluate and recommend technology-related policies and procedures
- Recommend IT service and project priorities for the University
- Advise on the implementation of the UO IT Strategic Plan
- Advise on the development of future versions of the UO IT Strategic Plan
- Identify existing campus technology committees and working groups, then develop and maintain a framework that connects them back to this Committee for purposes of information-sharing
- Review proposals, recommendations, and input from other campus technology committees and working groups make recommendations for further action
- Provide recommendations for effective use of campus-wide technology resources

16



Governance

Activities *con't*

- Support the CIO (*and appropriate others*) in campus-wide monitoring of and ensuring compliance with best practices, IT policies/processes, and institutional priorities
- Provide input regarding technology project and service proposals into the campus budget process
- Recommend approval of all proposed technology projects and services that meet certain criteria (e.g., affects a certain number of campus users, affects more than one campus unit)
- Make recommendations for aligning IT professional resources to institutional goals with respect to UO's IT organizational structure and standards for compensation and competency
- Recommend approval of procurement of all technology services and products that meet certain criteria (e.g., a large project over a certain dollar threshold)

17



Governance

- Many other campus leaders should have **formal** responsibilities within the IT governance framework:
 - Example: GC should provide appropriate staff during policy development/revision
 - Example: VPRI should provide appropriate staff during discussions of research computing needs
- It is critical for **all** members to understand the University's mission, goals, priorities, and strategic plans
- Both models require Central IS to provide appropriate staffing with IT professionals and other support staff (e.g., scheduling meetings, taking notes, ensuring proper liaison with communications)

18



Leveraging Resources

Guiding Principles

Important to consolidate functions that:

- Are strategic priorities for UO
- Will result in opportunities for scale economies
- Will result in a more efficient use of resources
- Cut across multiple units and do not require specialized knowledge of a unit
- Will result in faculty/staff/students receiving new or improved services/products
- When consolidated, improve operations and mitigate risks

19



Leveraging Resources

Long Term: Run coordinated assessment process

- Establish an inventory of all existing units/functions that need to be assessed
- Provide support and direction to Harvey Blustain as he
 - Prioritizes the review of the units/functions
 - Creates the rubric by which each unit/function is assessed (based on the established guiding principles)
 - Sets the timeline for staged completion
 - Carries out the assessment process

Short Term: Focus on 5 areas for consolidation/coordination

20



Leveraging Resources

Short Term

Goal: Identified areas that (1) address risks identified by Baker Tilly, (2) could result in fairly rapid cost savings/efficiencies, (3) have an identified path forward, or (4) are likely to be supported by campus

Five areas have been identified that address the goals above

- Consolidate data centers
- Establish central contracts for hardware procurement
- Handle vendor enterprise software licensing through Central IS
- Move all email/calendaring to a single system in the cloud
- Better coordinate help desk support

21



Leveraging Resources

Item	Implementation Next Steps	Concerns Addressed
Data Center Consolidation	As a part of the IT infrastructure assessment we will develop an inventory of all existing data centers; determine how much it would cost to consolidate existing data centers; and set a proposed plan and timeline for how to consolidate each of the data centers knowing there will be a limited budget available every year (e.g., consolidate as servers reach end of life)	<ul style="list-style-type: none"> • Security (<i>better controlled access to network/systems</i>) • Long-term cost savings (<i>less staff time spent maintaining equipment, less equipment/locations to maintain & cool</i>)
Enterprise Software	Determine what software would fall under the consolidation	<ul style="list-style-type: none"> • Immediate cost savings due to economies of scale
Hardware Procurement	Determine the full scope of hardware purchases that should be incorporated; identify known exceptions as well as recommend a process to approve requested exceptions	<ul style="list-style-type: none"> • Immediate cost savings due to economies of scale
Cloud Email/Calendaring	Determine which system meets all legal requirements; engage campus in developing transition plan to ensure all technical and service issues are addressed; complete the IT infrastructure assessment <small>(Start-up funds for this initiative equal approximately \$300,000. These funds will not be expended on email/calendaring until the infrastructure assessment is complete to ensure they are not needed to address other immediate infrastructure issues.)</small>	<ul style="list-style-type: none"> • Security (<i>better controlled access to network/systems</i>) • Immediate and long-term cost savings (<i>less staff time spent maintaining equipment, less equipment/storage to maintain, less time spent coordinating calendars</i>)
Help Desk Support	Purchase the IT Service Management Product (creates a ticketing system that can be shared across units and users can track) <small>(Further assess if additional help desk consolidations/coordination are advisable through the long-term assessment process led by Harvey Blustain)</small>	<ul style="list-style-type: none"> • Long-term savings due to increased staff efficiencies

22

IT Investments

Process for Decisions:

- President/Provost asked IT Steering Committee to prioritize necessary investments based on two thresholds: \$2.75 million and \$4 million
- A task force of the Steering Committee vetted the IT project ideas that had been solicited from campus as part of the Moran Technology Consulting engagement
- The IT Steering Committee recommended that the majority of the initial \$2.75 million be invested in infrastructure
- The investments that were recommended beyond the initial \$2.75 million threshold were forwarded to the Budget Advisory Group ("BAG") for discussion and evaluation versus other critical campus investments
- One IT project forwarded to the BAG was ultimately recommended for funding: the Electronic Workflow Project

23



IT Investments

Investment Decisions:

Total Additional Investment: \$3.3 million (\$3m recurring)

- Focuses on infrastructure
- Recommends basic security measures
- Includes several first steps on consolidation/coordination

See Appendix B for a chart detailing all funding decisions, including out-year costs.

24



IT Investments

Infrastructure

- **\$2 million** (*\$300,000 recurring*)

Replace current core switches (2) with 4 network core switches to build redundancy into current network and increase network speed (from 10 Gbps to 100 Gbps)
- **\$587,000** (*over \$2 million likely available recurring for infrastructure, will be based on assessment*)

Hold for spending until infrastructure assessment complete
Could be used for immediate upgrades, data center consolidations, email/calendaring, business continuity assessment, or other identified needs

25



IT Investments

Security

- **\$80,000** (*\$50,000 recurring*)

Implement 2-factor authentication (requires users to utilize both a password and another component such as a token, PIN, or biometric for accessing sensitive systems)
- **\$17,000** *recurring*

Implement a training program covering topics such as phishing and malware
- **\$50,000** *recurring*

Implement a security information/event management (SIEM) tool that allows for a quicker, proactive discovery of unauthorized access to systems

(This additional funding is not needed until next year as the first year of funding is already covered by Central IS.)

26



IT Investments

Strategic Initiatives

- **\$548,000 (\$271,000 recurring)**
Launch a workflow system, a new set of tools that enables the University to redesign business processes and create streamlined, electronic workflows for current time-intensive paper-based processes
- **\$75,000 (recurring costs escalate based on number of users)**
Execute an IT Service Management (ITSM) tool that facilitates better cross-campus communications between IT units and increases the quality of customer service (e.g., creates help desk ticket tracking system)
- **\$10,000 recurring**
Implement a content delivery network (CDN) that provides a centralized means for storing and delivering static web content (e.g., images, videos) that can be utilized by all campus websites
- **\$15,000 recurring**
Deploy web services and data integration technologies to implement a framework and interface (API) that allows secure and consistent access to institutional data by systems and applications
- **\$75,000 to be funded next year (\$4,000 recurring)**
Assessment of needed Banner functionalities and migrate to next version (including training)

27



Campus Engagement

Continue to engage the campus in an ongoing dialogue

- Develop a website to post details on, for example, the process to-date, Moran's report, Baker Tilly's report, information on the CIO recruitment (when ready), new leadership team
- Work with the new leadership team to create a series of campus forums to get feedback on various issues (e.g., challenges to consider when implementing a single cloud tool for email/calendaring, innovative ideas, infrastructure concerns)
- Maintain ongoing relationships and briefings for the Faculty Senate and OA Council

28



What We Need to Do . . .

29



Over the Next 12 Months

- Engage the Campus
- Re-envision the CIO position and engage in active recruitment to hire the best candidate to move our work forward
- Implement the new governance model
- Implement short-term consolidation/coordination efforts
- Fully assess the state of our infrastructure and determine how to make strategic investments in critical areas
- Fully assess all of our IT functions/units and determine how to rationalize (i.e., consolidate/coordinate) their distribution across campus

30



Chief Information Officer

- Must believe in the mission of the University of Oregon and understand the strategic role IT can play in accomplishing that mission (and, alternatively, how IT can stifle UO's ability to carry out that mission)
- Must be a senior executive who can set a vision for IT and understand how to communicate with and advise senior leaders
- Must gain the trust and respect of faculty, staff and students
- Must have the technical expertise to carry-out the job

O

31

Update: High Performance Computing

O

32

HPC: 2.0 Status Update

Work to date:

- Identified initial seed and recurring funding for a new High Performance Computing facility
- Confirmed that HPC 2.0 will be a core research facility managed by VPRI as a subsidized recharge center, with hardware located in the Allen Hall data center
- Committee of 8 faculty and 2 staff
 - Chair: Joe Sventek (Professor and Department Head, Computer and Information Science)
 - VPRI lead: William Cresko (Associate Vice President for Research)
- Charge to committee:
 - Technical specification for new hardware and software purchases; Oversee purchase of equipment
 - Advise on appropriate staffing levels for facility
 - Advise on appropriate business model for facility and complete initial charge-back costing
 - Work within existing identified funding
 - Complete decision making, in conjunction with VPRI, by March 1, 2016
 - Open facility by July 1, 2016

33



HPC: 2.0 Status Update

Work to date: (cont'd)

- Initial technical specifications for computing and storage hardware sent out
- Briefings with vendors: 5 for computing, 4 for storage, 90 minutes each
- Final technical specifications provided to vendors
- Facility Director job position

Upcoming Work:

- Launch Director Search (now)
- March-April: Finalize governance structure, business model, recharge prices/structures
- March-April: Finalize staffing plan, specific space needs, choose vendors, purchase equipment
- June: Installation
- July 1: Begin testing
- August 15: Open for business

34



APPENDIX A

35



Bios for Interim IT Leadership

Chris Krabiel: Interim CIO

Staff Director of Finance and Operations (COE)

BS, California Lutheran University

MBA, University of Nevada-Reno

Chris Krabiel has more than 25 years of financial experience, most recently serving in the positions of Senior Vice President, Regional General Manager and Chief Financial Officer and Treasurer with Affinity Gaming, a multistate casino and entertainment company. Prior to Affinity, and since August 2004, he served as Vice President of Operational Finance of Boyd Gaming Corporation. Chris's primary responsibilities have been expanding, restructuring, building, and financing organizations and operations. During that time, he reorganized and reestablished a \$500M post bankrupt company, executed acquisitions and divestures, and implemented key business strategies for companies, including integrating IT, Finance and Marketing systems and organizational structures across large organizations for Las Vegas based gaming companies.

36



Bios for Interim IT Leadership

Joe Sventek: Infrastructure Lead

Professor and Department Head, Computer and Information Science

BA, Mathematics, Rochester

PhD, Nuclear Chemistry, Berkeley

Joe Sventek is a Professor and Department Head in the Department of Computer and Information Science at the University of Oregon. He also is currently the lead for the University's efforts around *High Performance Computing*. Prior to joining the University of Oregon, Joe was a member of technical staff, Lawrence Berkeley National Laboratory, Berkeley, CA; deputy chief architect, Advanced Networked Systems Architecture project, Cambridge, England; distinguished engineer, Hewlett-Packard Laboratories, Palo Alto, CA; director, Agilent Labs Scotland, Edinburgh, Scotland; Professor of Communication Systems, Department of Computing Science, University of Glasgow, Glasgow, Scotland; and Head of School of Computing Science, University of Glasgow, Glasgow, Scotland.

37



Bios for Interim IT Leadership

Miriam Bolton: Staff Management Lead

BA, Sociology, University of Oregon

Miriam Bolton is Assistant Dean for Administration and Operations for the College of Arts and Sciences at the University of Oregon. Prior to joining CAS, Miriam was the Executive Assistant to the Dean of the Lundquist College of Business after serving as Executive Assistant to Provost Linda Brady. As a member of the CAS Leadership Team, Miriam works closely with the Dean, associate deans and other leadership across campus. Issues include collective bargaining agreements, departmental governance documents, merit and equity increases, faculty grievances as well as officer of administration complaints. She serves as a liaison for 43 department and program heads, working to solve problems, answer questions, and communicate priorities and expectations from the Dean and central administration.

Miriam has been an active participant in campus governance and has extensive and diverse university service including the Campus Planning Committee, four years on the Officers of Administration Council (three as chair), three years on the University Senate Executive Committee, and membership on the 2012 Presidential Search Committee. She was the 2015 recipient of the University Senate's Officer of Administration Award for Distinguished Leadership and Service.

38



Bios for Interim IT Leadership

Harvey Blustain: Consolidation Lead (Consultant)

BA, New York University

M.Phil. and Ph.D., Anthropology, Yale

Harvey Blustain has consulted to universities and colleges for 17 years, first as northeast regional Director in the PricewaterhouseCoopers higher education consulting practice and then as founder and president of Act IV Consulting, Inc. He has helped scores of institutions solve problems related to planning and organizational effectiveness, and has had experience consulting in all academic and administrative areas of higher education. Prior clients in IT include:

Thomas Jefferson University. Harvey developed a strategic plan for the IT function. Subsequent follow-on engagements focused on developing an IT governance structure, convening a university group around management of demographic data, and developing staffing and support plans for specific administrative systems.

Tufts University. Harvey advised on roles, structure, and accountabilities for central and departmental units responsible for academic (research, teaching and learning, and computational) technologies. The project looked at resource allocations required for the institution to maintain currency in technology, meet service demands, and ensure fiscal viability.

39



APPENDIX B

40



IT Investments

Project	Year 1	Year 2	Year 3	Year 4	Year 5
IT Infrastructure: Core Network Switches	\$2,000,000	\$300,000	\$300,000	\$300,000	\$300,000
IT Infrastructure: Hold for spending until assessment complete	\$587,000	\$2,285,000	\$2,285,000	\$2,285,000	\$2,285,000
IT Security: Security Information/event Management (SIEM)	<i>Already funded from Central IS funds</i>	\$50,000	\$50,000	\$50,000	\$50,000
IT Security: Two-Factor Authentication	\$80,000	\$50,000	\$50,000	\$50,000	\$50,000
IT Security: Awareness Training	\$17,000	\$17,000	\$17,000	\$17,000	\$17,000
Strategic Investment: ITSM Product	\$75,000	\$150,000	\$161,250	\$173,344	\$186,345
Strategic Investment: CDN	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
Strategic Investment: Web services and data integration	\$15,000	\$15,000	\$15,000	\$15,000	\$15,000
Strategic Investment: Banner ERP Evaluation & Upgrade	-	\$75,000	\$4,000	\$4,000	\$4,000
Strategic Investment: Enterprise Workflow	\$548,000	\$271,000	\$271,000	\$271,000	\$271,000
Totals	\$3,332,000	\$3,223,000	\$3,163,250	\$3,175,344	\$3,188,345

41



Written Reports

MEMORANDUM

February 23rd, 2016

TO: Angela Wilhelms, Secretary of the University
FROM: Randy Sullivan, University Senate President
RE: University Senate Written Report for 3/3/2015 Board Meeting

The Senate has been busy since the last board meeting. We have been meeting every two weeks and I am proud of the effort and engagement of the senators and of their commitment to service to our university. I would also like to thank you for your commitment our university.

In response to initiatives from the president's office, we have been hosting robust discussions during the senate meetings between the senators and the president, provost, and other administrators. We are pleased that the president has attended senate meetings whenever possible, even when he is not speaking. Consistent engagement like this bodes well for the future of effective shared governance. In our December meeting, President Schill addressed us regarding his three-part vision for advancing excellence at the UO and we followed it up with a question and answer session. Almost the entire January 13th meeting was dedicated to a discussion of the president's plan for reallocation of resources. It was a very spirited discussion, as you may well imagine. On January 27th Vice-President Alex-Assensoh and her team reported to the senate on the progress of the IDEAL framework and solicited feedback as this important initiative is being finalized.

The Senate has also deliberated on and approved several important items of business including three new IT security policies, a rewritten code of ethics, a much-needed course repeat policy, and program approval for a BA/BS in Arts Management. I would like to point out that the process used for the development and drafting of the IT policies is a great model of what collaboration should look like. At the time of writing of this report, we will be meeting tomorrow to consider a motion for revised membership of the Graduate Council and a program proposal for an MS in Sports Product Design. The membership revision motion was prompted because it was noted that there was a greater need for coordination between the Graduate Council and the Committee on Courses in the graduate program approval process; therefore, a member from the Committee on Courses will be added to the Graduate Council. This is one example of how we are using the lessons that we have learned from this round of program approval to improve the process. Other examples are: we will be having the various committees report to the Senate when appropriate during the proposal

approval process so that if there are concerns, they can be addressed earlier in the process; stakeholders will be invited to the Senate Executive Committee to address any questions or concerns when that body considers the proposal for placement on the senate agenda; and, a time line will be developed to help make sure that stakeholders get the program proposal to the senate early enough that we can exercise due diligence in fulfilling our obligation to oversee academic programs on behalf of the statutory faculty.

On January 22nd and 23rd, the Senate had the honor of hosting the winter meeting of the Interinstitutional Faculty Senate (IFS). Guests included Veronica Lujon, HECC Director of Academic Planning and Research; Oregon Senators Michael Denbrow and Arnie Roblan; our Provost, Michael Coltrane; Vice-Provost Kenneth Doxsee; and Assistant Vice-Provost Ron Bramhall. Vice-Provost Doxsee gave a report on developments in accelerated learning at the state level – a subject of great concern to the collective faculty of Oregon public universities as represented in the IFS.

During the proceedings of this IFS meeting someone asked for a show of hands of which senates did not give an oral standing report at meetings of their board. I am sad to say that the UO representatives were the only ones to raise their hands. It is one of the very few times during my fifteen years at the UO that I was actually ashamed of my university. I ask the board to please reconsider their ban on the oral standing report at board meetings by the University Senate President. It is a live connection that is vital to the health of shared governance at our university.

Go Ducks!



Agenda Item #1 - Supplement

Academic 2016-17 Tuition and Fees



UNIVERSITY OF OREGON

Tuition & Fees Proposal

March 4, 2016

Board of Trustees of the University of Oregon



UNIVERSITY OF OREGON

Agenda

- Tuition and Fee Setting Process
- Background Information
 - Tuition Revenue Components
 - Historical and Comparative Data
 - E&G Fund Context
- FY17 Major Cost Drivers
- Tuition and Fee Recommendations

Tuition and Fee Setting Process

- Tuition and Fee Advisory Board (TFAB): an advisory group appointed by the Provost to advise the President and Provost on tuition, mandatory fees and major non-mandatory fees
 - Fifteen members: two vice presidents, two vice provosts, two deans, four students, faculty, and staff from Institutional Research, Financial Aid, and Budget Office
 - Met twelve times October through January
 - Public meetings; other students made comments and joined discussion
- Student Forums on Tuition: three student forums held throughout the year
- Public Posting of Tuition Recommendations for comment and feedback

Agenda

- Tuition and Fee Setting Process
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FY16 Tuition Revenue

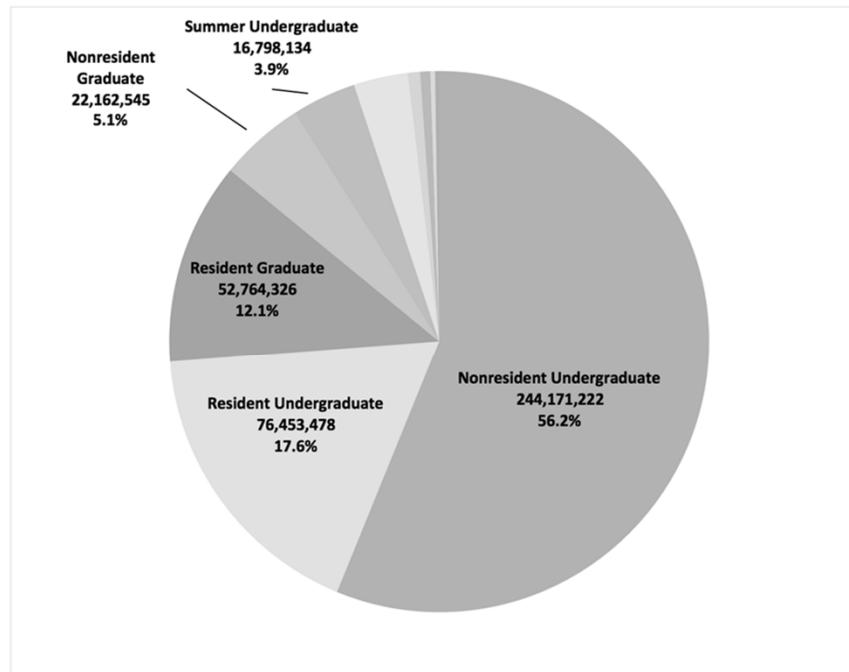
FY16 Tuition Revenue Estimates

Nonresident Undergraduate	244,171,222
Resident Undergraduate	76,453,478
Resident Graduate	52,764,326
Nonresident Graduate	22,162,545
Summer Undergraduate	16,798,134
Continuing Education	14,122,040
Summer Graduate	3,188,263
Honors College	2,667,497
Family / Staff	1,148,111
Other Tuition	1,052,710
Total	434,528,326
Remissions	39,848,234
GTF Tuition Remissions	20,720,253
Net Tuition Revenue	373,959,839

Category

- Nonresident Undergraduate
- Resident Undergraduate
- Resident Graduate
- Nonresident Graduate
- Summer Undergraduate
- Continuing Education
- Summer Graduate
- Honors College
- Family / Staff
- Other Tuition

FY16 Tuition Revenue Estimates



FY16 Fee Revenue

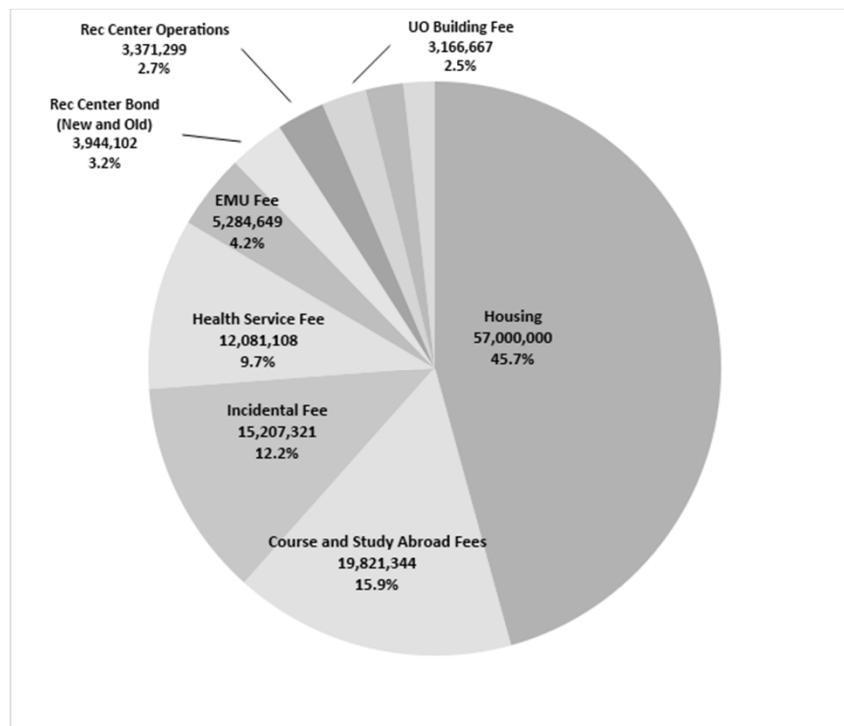
FY16 Fee Revenue Estimates

Housing	57,000,000
Course and Study Abroad Fees	19,821,344
Incidental Fee	15,207,321
Health Service Fee	12,081,108
EMU Fee	5,284,649
Rec Center Bond (New and Old)	3,944,102
Rec Center Operations	3,371,299
UO Building Fee	3,166,667
Matriculation Fee	2,632,146
International Fee	2,179,513
Grand Total	124,688,150

Category

Housing	Rec Center Bond (New and Old)
Course and Study Abroad Fees	Rec Center Operations
Incidental Fee	UO Building Fee
Health Service Fee	Matriculation Fee
EMU Fee	International Fee

FY16 Fee Revenue Estimates



Undergraduate Tuition and Fee History 2006-07 to 2015-16

Year	Resident		Nonresident	
	Amount	CPI-adjusted	Amount	CPI-adjusted
2006-07	\$5,970	\$7,260	\$18,768	\$22,824
2007-08	\$6,168	\$7,252	\$19,332	\$22,730
2008-09	\$6,485	\$7,342	\$20,042	\$22,690
2009-10	\$7,430	\$8,431	\$23,720	\$26,918
2010-11	\$8,190	\$9,149	\$25,830	\$28,854
2011-12	\$8,789	\$9,572	\$27,653	\$30,116
2012-13	\$9,310	\$9,889	\$28,660	\$30,443
2013-14	\$9,703	\$10,086	\$29,788	\$30,965
2014-15	\$9,918	\$10,051	\$30,888	\$31,303
2015-16	\$10,289	\$10,289	\$32,024	\$32,024

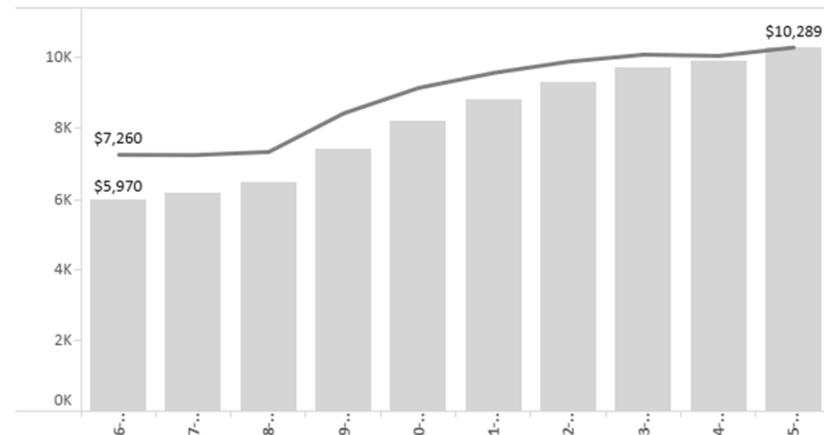
Notes:

1. The CPI values are provided by the Bureau of Labor Statistics and represent the Portland-Salem annual CPI values as of June 30, 2015.

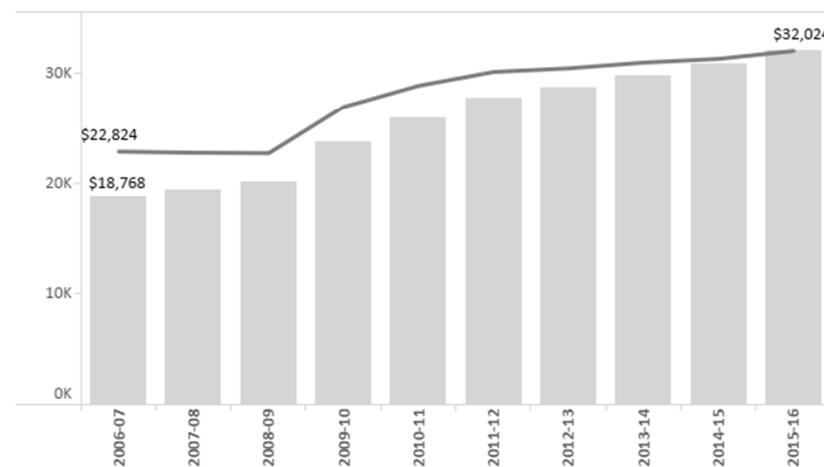
2. All of the costs presented in the table are annualized for the academic year. Tuition and fee rates correspond to a carrying load of 15 credit hours.

Source: UO Office of Institutional Research.

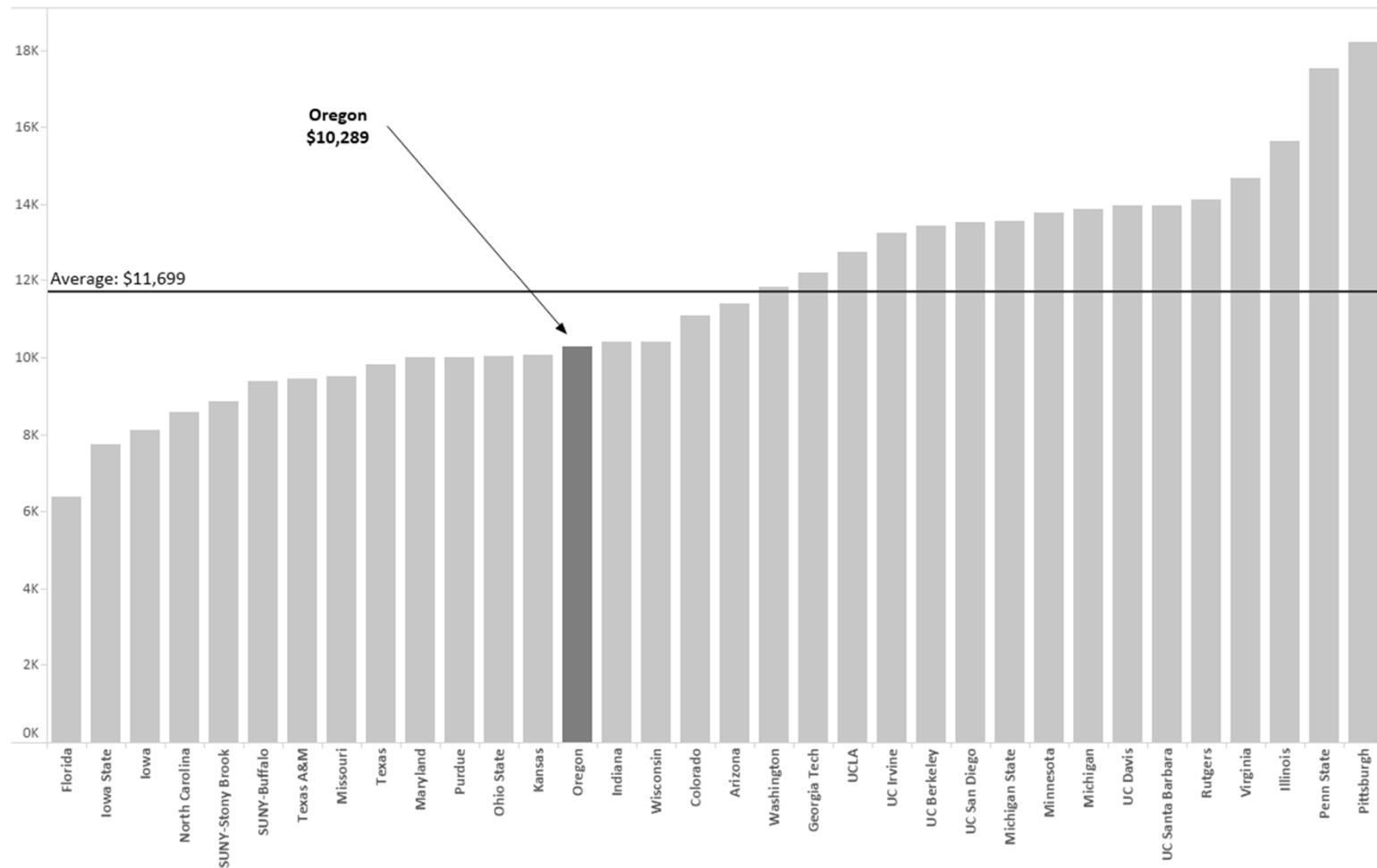
Tuition and Fees for Residents



Tuition and Fees for Nonresidents

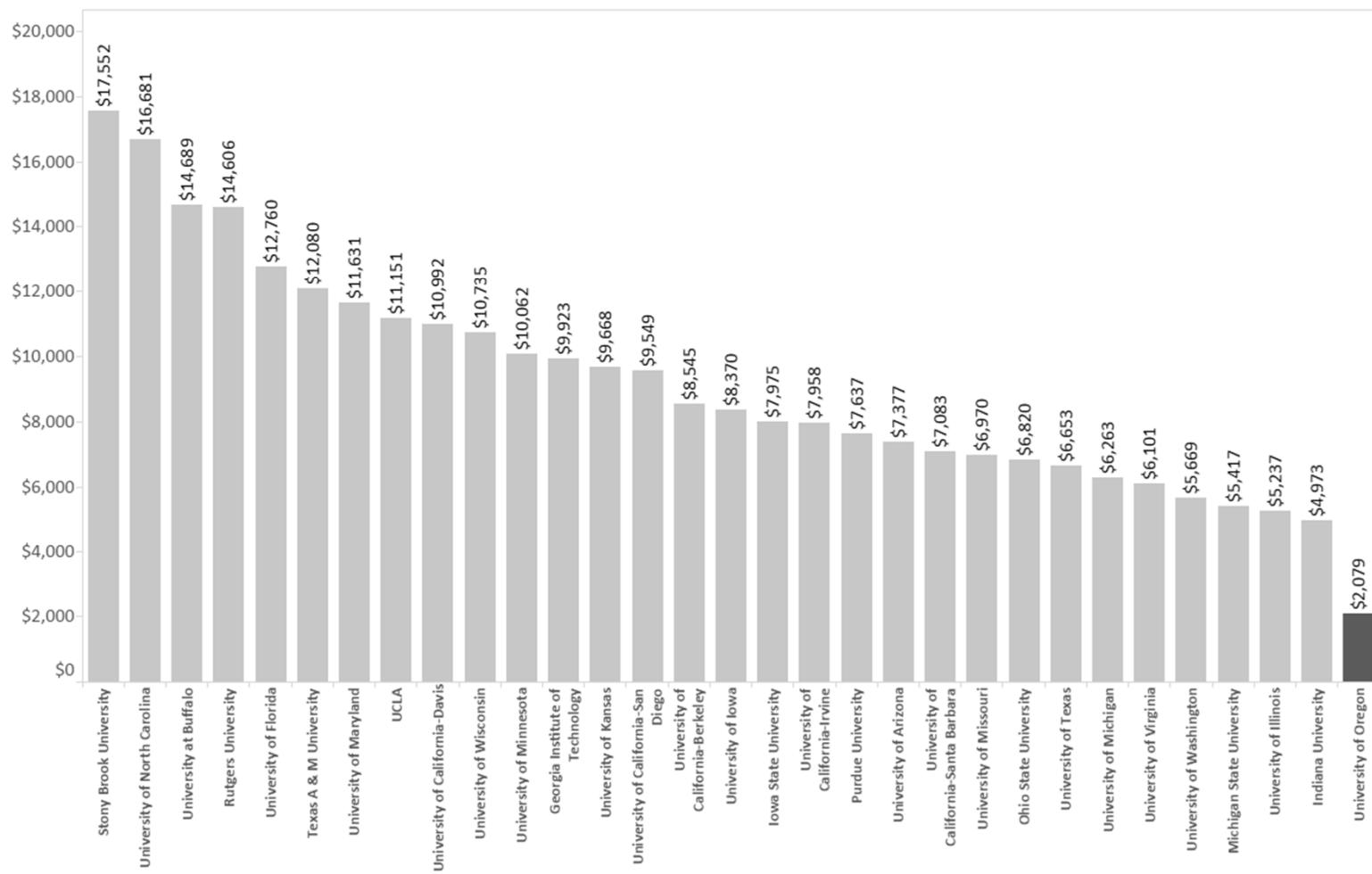


2015-16 Tuition and Fees for Resident Undergraduates among AAU Publics



Source: AAUDE Tuition and Fees.

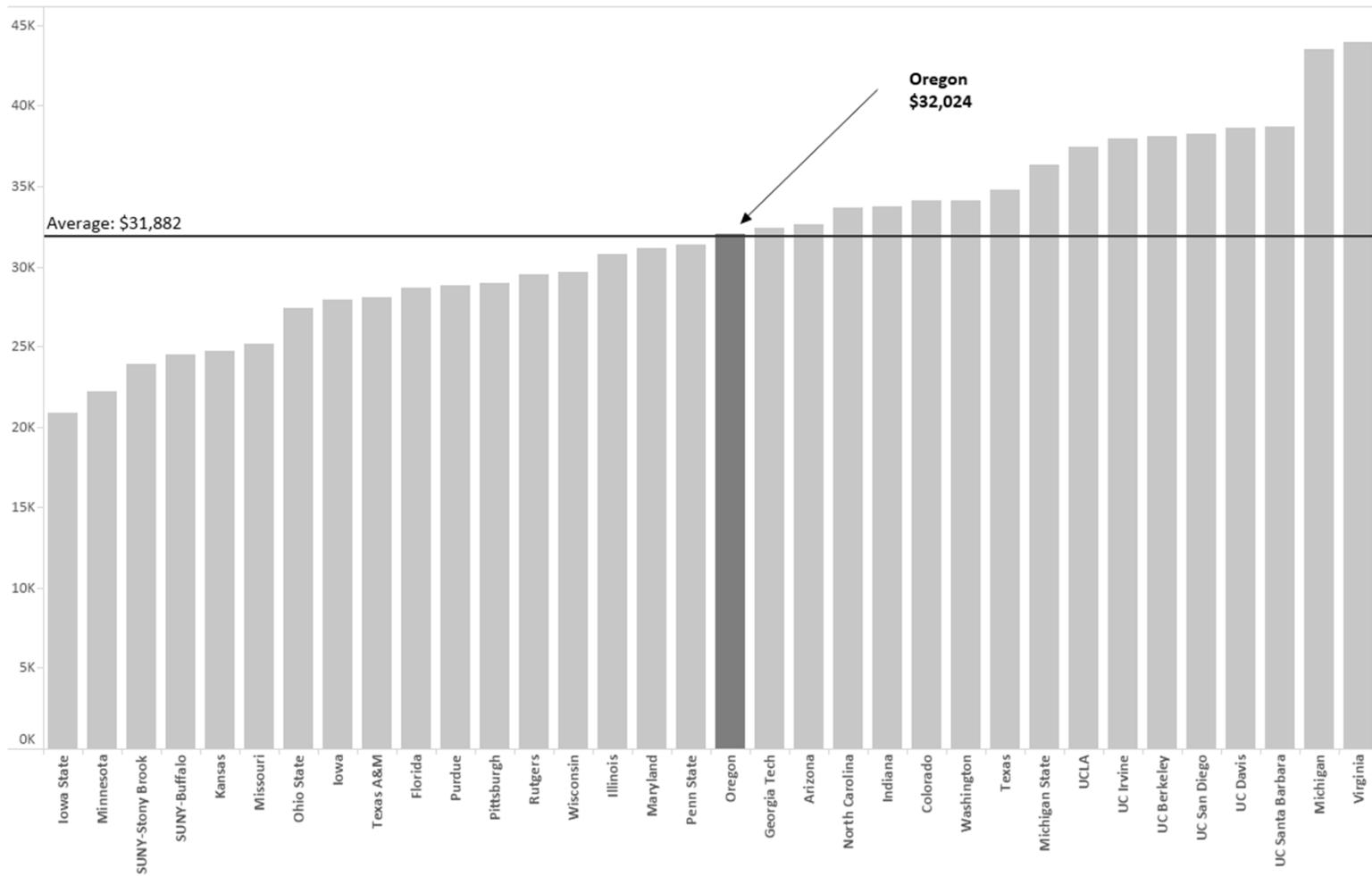
State Appropriations per Student FTE (FY2014) among AAU Publics



Note: Penn State University, University of Colorado, and University of Pittsburgh are excluded from the table because Pennsylvania and Colorado have alternative funding mechanisms.

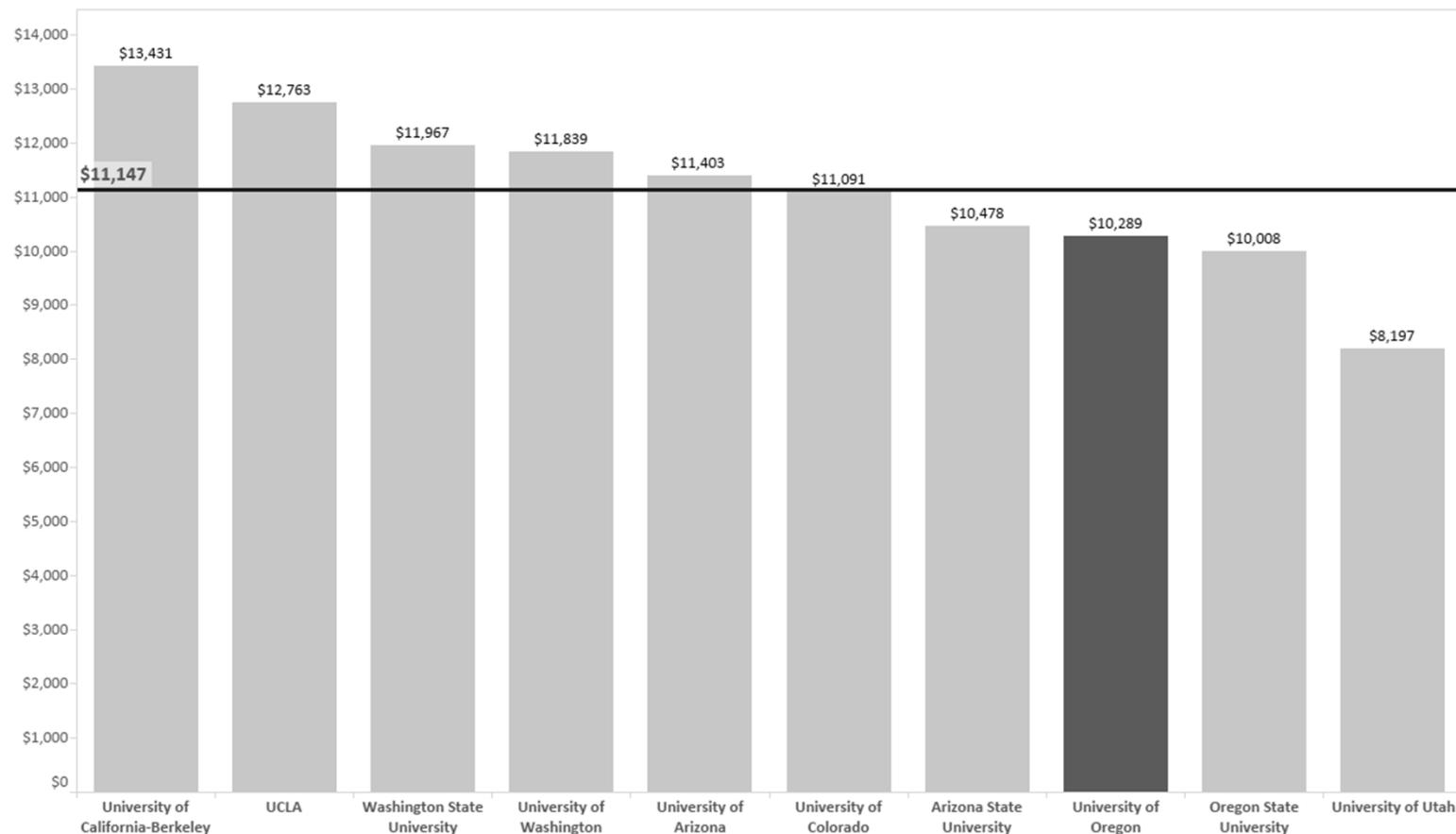
Source: IPEDS Finance (FY2014) and Enrollment (FY2014).

2015-16 Tuition and Fees for Nonresident Undergraduates among AAU Publics



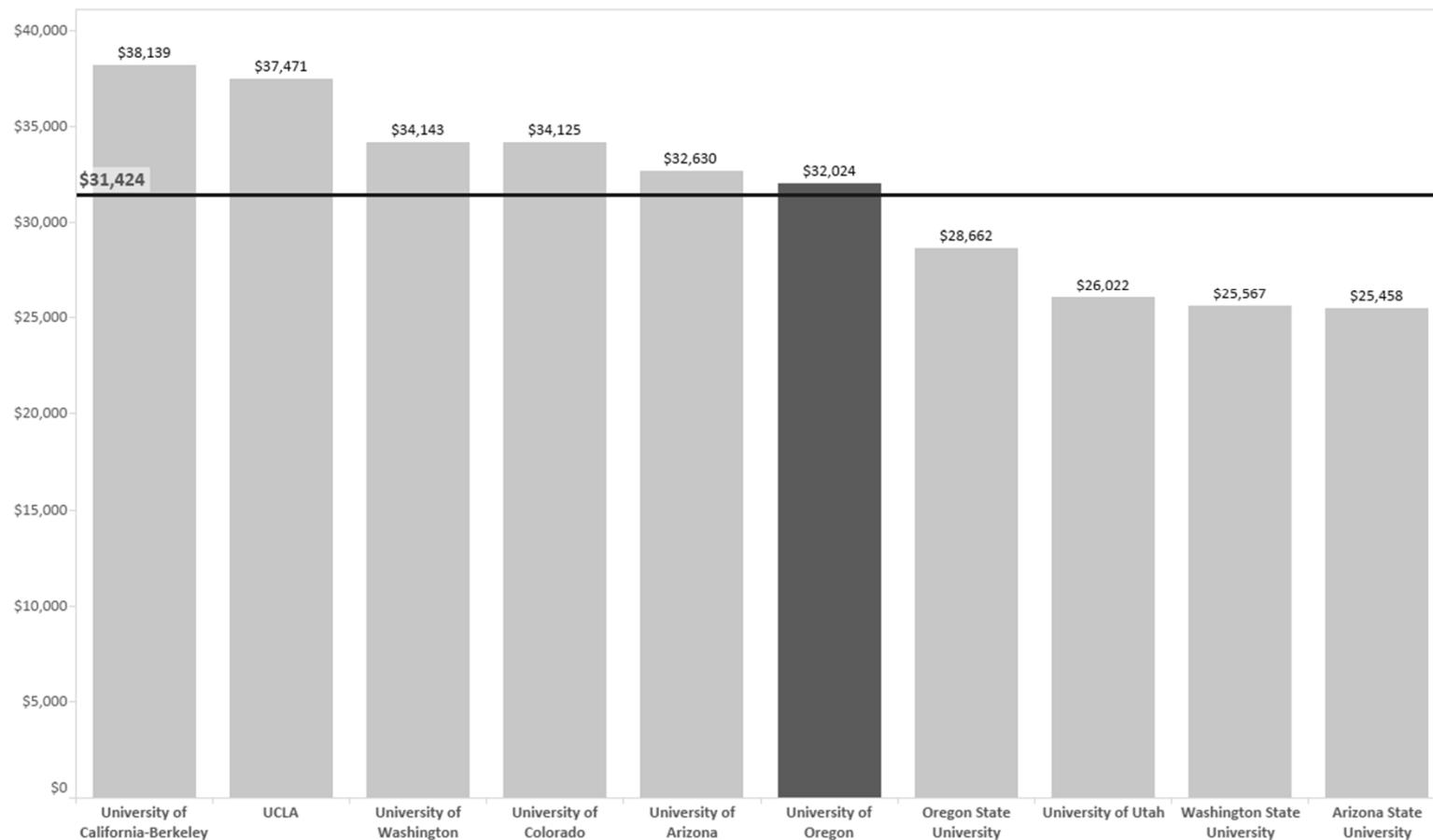
Source: AAUDE Tuition and Fees.

2015-16 Tuition and Fees for Residents - PAC 12 Publics



Source: AAUDE Tuition and Fees and institution web sites.

2015-16 Tuition and Fees for Nonresidents - PAC 12 Publics



Source: AAUDE Tuition and Fees and institution web sites.

Agenda

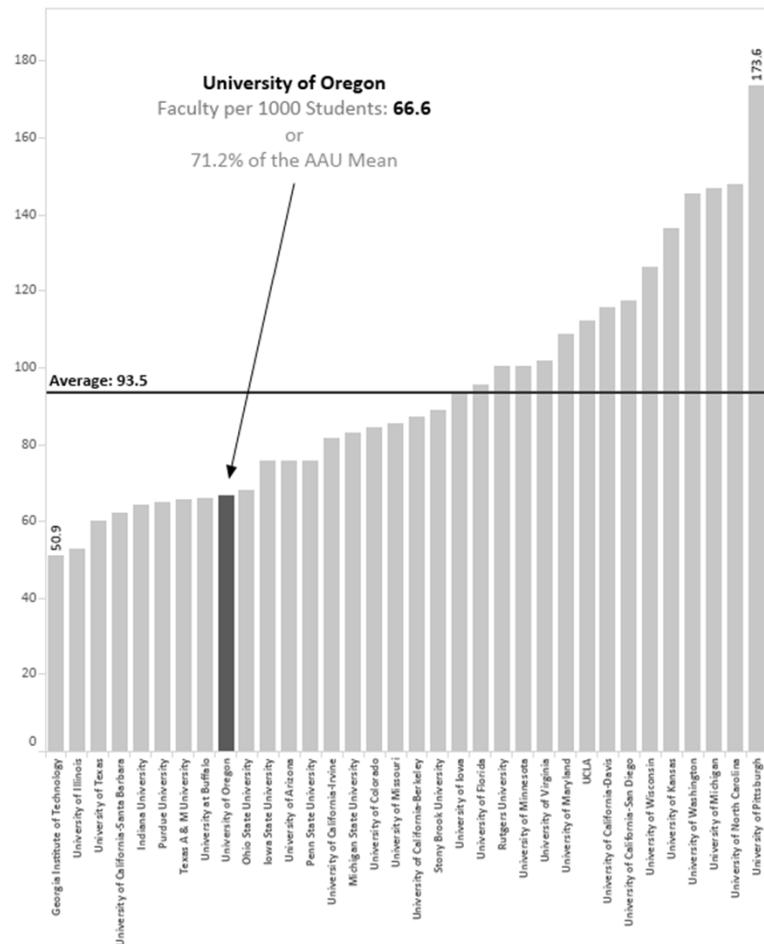
- Tuition and Fee Setting Process
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 - Tuition Revenue Components
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- • E&G Fund Context
- FY17 Major Cost Drivers
- Tuition and Fee Recommendations

Context – E&G Fund

- E&G Fund - Characteristics
 - 80% funded with tuition revenue
 - Funds majority of activity in schools and colleges and administrative units
 - Over 80% invested in people

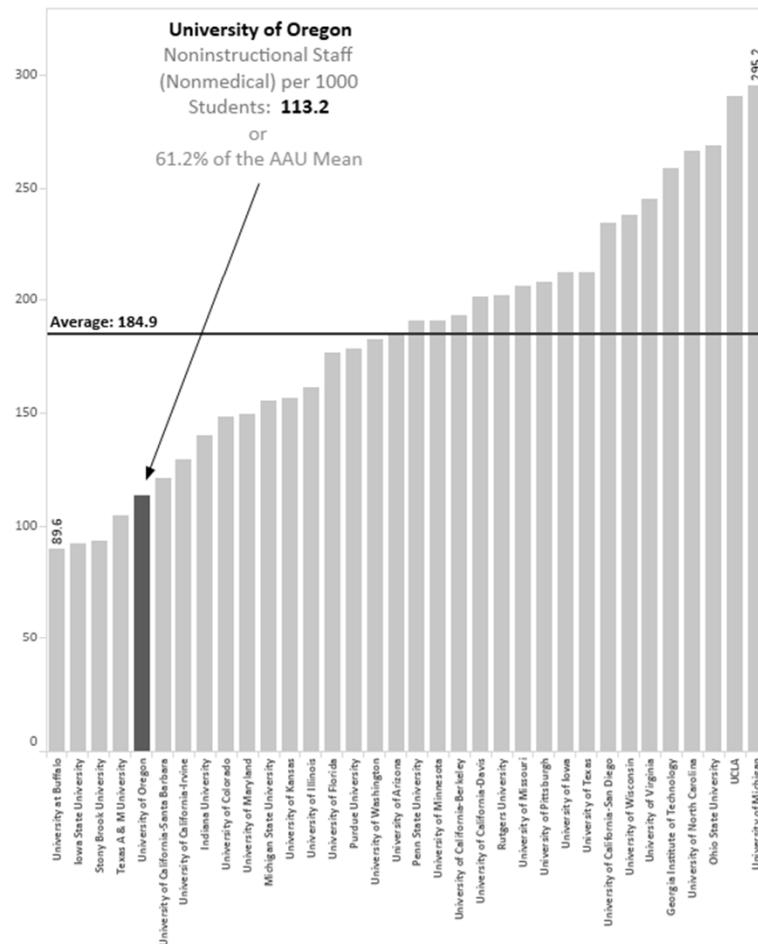
Comparison of Staffing without Medical Personnel per 1,000 Students

Faculty per Students



Source: IPEDS Human Resources and Enrollment (FY2014).

Noninstructional (Nonmedical) Staff per Students



Source: IPEDS Human Resources and Enrollment (FY2014).

Context – E&G Fund

- E&G Fund - Characteristics
 - 80% funded with tuition revenue
 - Funds majority of activity in schools and colleges and administrative units
 - Over 80% invested in people
- E&G Fund – Recent History
 - FY15: \$10 million deficit (\$6.5 million related to recurring issues)
 - FY16: Projections balanced due to state investment and tuition increase
 - FY17: any increased costs must be covered by increased revenue or other decreased costs

Agenda

- Tuition and Fee Setting Process
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Summary – Major E&G Fund Cost Drivers

Cost Driver	Projected Cost
Faculty and Staff Salary and Wages	\$7.6 million
GTF Salary and Wages	TBD
Medical Costs	\$2.2 million
Retirement Costs	n/a
Institutional Expenses	\$1.5 million
Strategic Investments (includes \$1 million for new faculty)	\$2.0 million
IT Infrastructure Investments	\$2.75 million
Increase to Minimum Wage	TBD
Investments in Tenure Track Faculty	\$1.5 million
Total Project Cost Increases*	\$17.5 million*

**Does not include negotiated GTF contract increases, increases to minimum wage, additional investments needs in IT, costs related to federal FLSA regulations changes regarding eligibility for overtime pay; further investments in diversity initiatives, or individual school/college/department investments.*

Summary – Major E&G Fund Cost Drivers

Cost Driver	FY17 Projected Cost Increase	FY18 Projected Cost Increase
Faculty and Staff Salary and Wages	\$7.6 million	\$10.6 million
GTF Salary and Wages	TBD	TBD
Medical Costs	\$2.2 million	\$2.2 million
Retirement Costs	n/a	\$6 million
Institutional Expenses	\$1.5 million	\$1.5 million
Strategic Investments (includes \$1 million for new faculty)	\$2.0 million	\$2.0 million
IT Infrastructure Investments	\$2.75 million	\$2.75 million?
Increase to Minimum Wage	TBD	TBD
Investments in Tenure Track Faculty	\$1.5 million	\$1.5 million
Total Project Cost Increases*	\$17.5 million*	\$26.5 million*

*Does not include negotiated GTF contract increases, increases to minimum wage, additional investments needs in IT, costs related to federal FLSA regulations changes regarding eligibility for overtime pay; further investments in diversity initiatives, or individual school/college/department investments.

FY17 E&G Fund Major Cost Drivers

Factor	Projected Cost Increase	Notes
Faculty and Staff Salary and Wages	\$7.6 million	Per collective bargaining agreements. Officers of Administration salary package assumed to be similar to faculty salary package. Does not include GTF salary increases
GTF Salary and Wages	TBD	Negotiations for new contract currently underway
Medical Cost (PEBB)	\$2.2 million	Includes 3.3% PEBB increase as of Dec 2015 and estimated 5.0% increase as of Dec 2016. Average annual increase over last 14 years has been 5.7%.

FY17 E&G Fund Major Cost Drivers (continued)

Factor	Projected Cost Increase	Notes
Retirement Costs (PERS)	n/a	No increase in FY17. \$6 million to \$8 million increase projected for FY18. PERS Board projecting additional significant increases to occur in FY20 and FY22.
Institutional Expenses	\$1.5 million	Debt, rent, utilities, insurance and assessments.
Strategic Investment Fund	\$2.0 million	\$1 million pre-committed to tenure track faculty hires as part of cluster hires. \$400K pre-committed to Graduate Student Fellowships.

FY17 E&G Fund Major Cost Drivers (continued)

Factor	Projected Cost Increase	Notes
IT Infrastructure Investments	\$2.75 million	Necessary Phase One investments. Additional significant investments likely needed in FY2018.
Increase to Minimum Wage	TBD	Oregon current minimum wage is \$9.25 per hour. The impact to E&G fund of \$13.50 minimum wage would be approximately \$2.0 million per year; \$15 minimum wage impact would be \$3.4 million per year.
Investments in New Tenure Track Faculty	\$1.5 million	

Summary – Major E&G Fund Cost Drivers

Cost Driver	Projected Cost
Faculty and Staff Salary and Wages	\$7.6 million
GTF Salary and Wages	TBD
Medical Costs	\$2.2 million
Retirement Costs	n/a
Institutional Expenses	\$1.5 million
Strategic Investments (includes \$1 million for new faculty)	\$2.0 million
IT Infrastructure Investments	\$2.75 million
Increase to Minimum Wage	TBD
Investments in Tenure Track Faculty	\$1.5 million
Total Project Cost Increases*	\$17.5 million*

**Does not include negotiated GTF contract increases, increases to minimum wage, additional investments needs in IT, costs related to federal FLSA regulations changes regarding eligibility for overtime pay; further investments in diversity initiatives, or individual school/college/department investments.*

Agenda

- Tuition and Fee Setting Process
- Background Information
 - Tuition Revenue Components
 - Historical and Comparative Data
 - E&G Fund Context
- FY17 Major Cost Drivers
- • Tuition and Fee Recommendations

Undergraduate Tuition Proposed Increase

- Resident Tuition
 - Increase 4.76% (\$9 per SCH) from \$189 / SCH to \$198 / SCH
 - Total annual resident tuition (at 45 SCH) increases from \$8,505 to \$8,910
- Non-resident Tuition
 - Increase 4.46% (\$30 per SCH) from \$672 / SCH to \$702 / SCH
 - Total annual non-resident tuition (at 45 SCH) increases from \$30,240 to \$31,590
- Honors College Differential
 - No increase
 - Remains at \$1,278 per term / \$3,834 per year
- Summer School Rates: increases will match academic year increases (courses are offered at a discount)

Graduate Tuition Proposed Increases

- With one exception – increases vary between 0% and 3.5% (see handouts)
- AAA – Graduate Studio Program
 - Resident tuition increase – 4.5%
 - Non Resident increase – 10.2%
 - Proposed rates still represent a substantial discount compared to peer school tuition rates
 - AAA will use fee remissions to lock in these rates for entering students
 - Existing students – grandfathered in at existing rates

Proposed Mandatory Fee Increase

- Overall proposed mandatory fee rate increase is 3.83%
- Most mandatory fees are not being increased (see handout for details)
- Fees increasing:
 - Health Center Fee: \$161 to \$173.75 per term (7.9%)
 - Incidental Fee: ASUO is proposing \$223.75 to \$233.75 per term (4.47%)

E&G Fund

- Major cost drivers likely to increase by at least \$17.5 million to \$20 million per year
- Proposed plan to cover costs
 - Undergraduate tuition increase: will generate \$13.5 million per year (net of \$1.4 million of new fee remissions)
 - State funding: projected to increase by \$2.0 million - \$2.5 million per year
 - Cost cutting: initiatives underway to cut at least \$3.0 million recurring by FY17

Board of Trustees of the University of Oregon

Resolution: AY16-17 Tuition and Fees

Whereas, the Board of Trustees of the University of Oregon (the “Board”) has the authority to determine tuition and mandatory enrollment fees in accordance with ORS 352.102, ORS 352.105, ORS 352.107, and other applicable law, and policy;

Whereas, the University has established recommended tuition and mandatory enrollment fees for Academic Year 2016-2017 (AY16-17) based on the work of a campus advisory group—representing undergraduate students, graduate students, faculty and staff; a series of public forums; and a public comment period;

Whereas, the Board authorizes the collection of mandatory incidental fees for AY16-17 recommended by the president of the University and the recognized student government (ASUO) and established in accordance with provisions outlined in ORS 352.102, ORS 352.105, ORS 352.107, and other applicable law, and policy; and,

Whereas, the Board has authority to establish policies for the organization, administration and development of the university which, to the extent set forth in those policies, shall have the force of law and may be enforced through university procedures that include an opportunity for appeal and in any court of competent jurisdiction;

NOW, THEREFORE, the Board of Trustees of the University of Oregon hereby approves the following:

1. RESOLVED, that the AY16-17 tuition and mandatory fee schedule attached hereto as Exhibit A is adopted;
2. FURTHER RESOLVED, that the AY16-17 “Policies on Tuition, Mandatory Enrollment Fees, and Other Charges, Fines and Fees” (“Policies”) attached hereto as Exhibit B are adopted effective July 1, 2016 and shall repeal, supersede and replace all University of Oregon rules and policies related to subject matters addressed in the Policies, except as determined by the President; and
3. FURTHER RESOLVED, that the President, or his designee(s), may take all actions necessary to implement and enforce AY2016-17 tuition and fees and associated Policies.

--Vote recorded on the following page--

Moved: _____

Seconded: _____

Trustee	Yes	No
Ballmer		
Bragdon		
Chapa		
Colas		
Curry		
Ford		
Gary		
Gonyea		
Kari		
Lillis		
Paustian		
Ralph		
Wilcox		
Willcox		

Dated: _____

Initials: _____



UNIVERSITY OF OREGON

UNIVERSITY OF OREGON

**TUITION AND FEES
2016-17 ACADEMIC YEAR
AND
2017 Summer Session**

PROPOSED

Approved by the Board of Trustees of the University of Oregon on XXXXX

2016-17 ACADEMIC YEAR TUITION AND FEE INCREASES

ACADEMIC YEAR

	2015-16 Tuition	2015-16 Fees	2015-16 Tuition and Fees	2016-17 Tuition	2016-17 Fees	2016-17 Tuition and Fees	Tuition Pct Increase	Fee Pct Increase	Tuition and Fee Pct Increase
UNDERGRADUATE (annual tuition and fees at 15 credit hours)									
Resident	8,505.00	1,783.50	10,288.50	8,910.00	1,851.75	10,761.75	4.8%	3.8%	4.6%
Nonresident	30,240.00	1,783.50	32,023.50	31,590.00	1,851.75	33,441.75	4.5%	3.8%	4.4%
Honors Differential	3,834.00			3,834.00			0.0%		
GRADUATE (annual tuition and fees at the plateau rate)									
AAA									
<i>Studio</i>									
Resident	16,233.00	1,783.50	18,016.50	16,962.00	1,851.75	18,813.75	4.5%	3.8%	4.4%
Nonresident	24,630.00	1,783.50	26,413.50	27,135.00	1,851.75	28,986.75	10.2%	3.8%	9.7%
<i>Non-Studio</i>									
Resident	15,003.00	1,783.50	16,786.50	15,435.00	1,851.75	17,286.75	2.9%	3.8%	3.0%
Nonresident	23,721.00	1,783.50	25,504.50	24,396.00	1,851.75	26,247.75	2.8%	3.8%	2.9%
CAS									
<i>MA/PhD</i>									
Resident	14,256.00	1,783.50	16,039.50	14,391.00	1,851.75	16,242.75	0.9%	3.8%	1.3%
Nonresident	24,165.00	1,783.50	25,948.50	24,759.00	1,851.75	26,610.75	2.5%	3.8%	2.6%
EDUCATION									
<i>Base</i>									
Resident	16,032.00	1,783.50	17,815.50	16,464.00	1,851.75	18,315.75	2.7%	3.8%	2.8%
Nonresident	22,752.00	1,783.50	24,535.50	23,400.00	1,851.75	25,251.75	2.8%	3.8%	2.9%
<i>Supervision</i>									
Resident	17,250.00	1,783.50	19,033.50	17,736.00	1,851.75	19,587.75	2.8%	3.8%	2.9%
Nonresident	23,943.00	1,783.50	25,726.50	24,618.00	1,851.75	26,469.75	2.8%	3.8%	2.9%
<i>Clinical</i>									
Resident	18,810.00	1,783.50	20,593.50	19,323.00	1,851.75	21,174.75	2.7%	3.8%	2.8%
Nonresident	25,422.00	1,783.50	27,205.50	26,151.00	1,851.75	28,002.75	2.9%	3.8%	2.9%
JOURNALISM									
<i>MA/PhD</i>									
Resident	14,661.00	1,783.50	16,444.50	15,093.00	1,851.75	16,944.75	2.9%	3.8%	3.0%
Nonresident	23,733.00	1,783.50	25,516.50	24,435.00	1,851.75	26,286.75	3.0%	3.8%	3.0%
<i>Strategic Comm</i>									
Resident	15,552.00	1,783.50	17,335.50	16,011.00	1,851.75	17,862.75	3.0%	3.8%	3.0%
Nonresident	23,733.00	1,783.50	25,516.50	24,435.00	1,851.75	26,286.75	3.0%	3.8%	3.0%
<i>Multimedia</i>									
Resident	15,552.00	1,783.50	17,335.50	16,011.00	1,851.75	17,862.75	3.0%	3.8%	3.0%
Nonresident	23,733.00	1,783.50	25,516.50	24,435.00	1,851.75	26,286.75	3.0%	3.8%	3.0%
LAW									
<i>JD</i>									
Resident	29,718.00	1,788.00	31,506.00	30,618.00	1,858.00	32,476.00	3.0%	3.9%	3.1%
Nonresident	37,422.00	1,788.00	39,210.00	38,538.00	1,858.00	40,396.00	3.0%	3.9%	3.0%
<i>LLM</i>									
Resident	36,918.00	1,788.00	38,706.00	38,034.00	1,858.00	39,892.00	3.0%	3.9%	3.1%
Nonresident	36,918.00	1,788.00	38,706.00	38,034.00	1,858.00	39,892.00	3.0%	3.9%	3.1%
<i>CRES</i>									
Resident	18,279.00	1,783.50	20,062.50	18,819.00	1,851.75	20,670.75	3.0%	3.8%	3.0%
Nonresident	24,705.00	1,783.50	26,488.50	25,434.00	1,851.75	27,285.75	3.0%	3.8%	3.0%
LCB									
<i>PhD</i>									
Resident	13,824.00	1,783.50	15,607.50	13,824.00	1,851.75	15,675.75	0.0%	3.8%	0.4%
Nonresident	23,031.00	1,783.50	24,814.50	23,031.00	1,851.75	24,882.75	0.0%	3.8%	0.3%
<i>MBA</i>									
Resident	26,490.00	1,783.50	28,273.50	27,417.00	1,851.75	29,268.75	3.5%	3.8%	3.5%
Nonresident	36,660.00	1,783.50	38,443.50	37,944.00	1,851.75	39,795.75	3.5%	3.8%	3.5%
<i>Accounting</i>									
Resident	18,315.00	1,783.50	20,098.50	18,957.00	1,851.75	20,808.75	3.5%	3.8%	3.5%
Nonresident	25,917.00	1,783.50	27,700.50	26,823.00	1,851.75	28,674.75	3.5%	3.8%	3.5%
MUSIC									
<i>MA/PhD</i>									
Resident	13,977.00	1,783.50	15,760.50	14,382.00	1,851.75	16,233.75	2.9%	3.8%	3.0%
Nonresident	21,723.00	1,783.50	23,506.50	22,371.00	1,851.75	24,222.75	3.0%	3.8%	3.0%

Source: UO Office of Institutional Research.

For additional information, please contact J.P. Monroe (jpmorroe@uoregon.edu) at 541-346-2085.

2016-17 SUMMER TUITION AND FEE INCREASES

SUMMER

	Summer 2016 Tuition	Summer 2016 Fees	Summer 2016 Tuition and Fees	Summer 2017 Tuition	Summer 2017 Fee	Summer 2017 Tuition and Fees	Tuition Pct Increase	Fee Pct Increase	Tuition and Fee Pct Increase
UNDERGRADUATE (summer tuition and fees at 12 credit hours)									
Resident	1,927.00	415.75	2,342.75	2,019.00	430.50	2,449.50	4.8%	3.5%	4.6%
Nonresident	5,239.00	415.75	5,654.75	5,473.00	430.50	5,903.50	4.5%	3.5%	4.4%
Honors Differential	-na-			-na-			-na-		
GRADUATE (summer tuition and fees at 9 credit hours)									
AAA									
<i>Studio</i>									
Resident	3,247.00	415.75	3,662.75	3,337.00	430.50	3,767.50	2.8%	3.5%	2.9%
Nonresident	4,101.00	415.75	4,516.75	4,218.00	430.50	4,648.50	2.9%	3.5%	2.9%
<i>Non-Studio</i>									
Resident	3,000.00	415.75	3,415.75	3,090.00	430.50	3,520.50	3.0%	3.5%	3.1%
Nonresident	3,946.00	415.75	4,361.75	4,063.00	430.50	4,493.50	3.0%	3.5%	3.0%
CAS									
<i>MA/PhD</i>									
Resident	2,844.00	415.75	3,259.75	2,871.00	430.50	3,301.50	0.9%	3.5%	1.3%
Nonresident	4,011.00	415.75	4,426.75	4,110.00	430.50	4,540.50	2.5%	3.5%	2.6%
EDUCATION									
<i>Base</i>									
Resident	3,307.00	415.75	3,722.75	3,397.00	430.50	3,827.50	2.7%	3.5%	2.8%
Nonresident	3,905.00	415.75	4,320.75	4,013.00	430.50	4,443.50	2.8%	3.5%	2.8%
<i>Supervision</i>									
Resident	3,551.00	415.75	3,966.75	3,650.00	430.50	4,080.50	2.8%	3.5%	2.9%
Nonresident	4,095.00	415.75	4,510.75	4,212.00	430.50	4,642.50	2.9%	3.5%	2.9%
<i>Clinical</i>									
Resident	3,952.00	415.75	4,367.75	4,060.00	430.50	4,490.50	2.7%	3.5%	2.8%
Nonresident	4,449.00	415.75	4,864.75	4,575.00	430.50	5,005.50	2.8%	3.5%	2.9%
JOURNALISM									
<i>MA/PhD</i>									
Resident	2,925.00	415.75	3,340.75	3,015.00	430.50	3,445.50	3.1%	3.5%	3.1%
Nonresident	3,930.00	415.75	4,345.75	4,047.00	430.50	4,477.50	3.0%	3.5%	3.0%
<i>Strategic Comm</i>									
Resident	3,114.00	415.75	3,529.75	3,204.00	430.50	3,634.50	2.9%	3.5%	3.0%
Nonresident	3,930.00	415.75	4,345.75	4,047.00	430.50	4,477.50	3.0%	3.5%	3.0%
<i>Multimedia</i>									
Resident	3,114.00	415.75	3,529.75	3,204.00	430.50	3,634.50	2.9%	3.5%	3.0%
Nonresident	3,930.00	415.75	4,345.75	4,047.00	430.50	4,477.50	3.0%	3.5%	3.0%
LAW									
<i>JD</i>									
Resident	12,483.00	415.75	12,898.75	12,861.00	430.50	13,291.50	3.0%	3.5%	3.0%
Nonresident	13,608.00	415.75	14,023.75	14,013.00	430.50	14,443.50	3.0%	3.5%	3.0%
<i>LLM</i>									
Resident	17,838.00	415.75	18,253.75	19,017.00	430.50	19,447.50	6.6%	3.5%	6.5%
Nonresident	17,838.00	415.75	18,253.75	19,017.00	430.50	19,447.50	6.6%	3.5%	6.5%
<i>CRES</i>									
Resident	6,093.00	415.75	6,508.75	6,273.00	430.50	6,703.50	3.0%	3.5%	3.0%
Nonresident	8,235.00	415.75	8,650.75	8,478.00	430.50	8,908.50	3.0%	3.5%	3.0%
LCB									
<i>PhD</i>									
Resident	2,763.00	415.75	3,178.75	2,763.00	430.50	3,193.50	0.0%	3.5%	0.5%
Nonresident	3,822.00	415.75	4,237.75	3,822.00	430.50	4,252.50	0.0%	3.5%	0.3%
<i>MBA</i>									
Resident	5,290.00	415.75	5,705.75	5,476.00	430.50	5,906.50	3.5%	3.5%	3.5%
Nonresident	6,113.00	415.75	6,528.75	6,328.00	430.50	6,758.50	3.5%	3.5%	3.5%
<i>Accounting</i>									
Resident	3,661.00	415.75	4,076.75	3,789.00	430.50	4,219.50	3.5%	3.5%	3.5%
Nonresident	4,326.00	415.75	4,741.75	4,479.00	430.50	4,909.50	3.5%	3.5%	3.5%
MUSIC									
<i>MA/PhD</i>									
Resident	2,797.00	415.75	3,212.75	2,878.00	430.50	3,308.50	2.9%	3.5%	3.0%
Nonresident	3,620.00	415.75	4,035.75	3,728.00	430.50	4,158.50	3.0%	3.5%	3.0%

Source: UO Office of Institutional Research.

For additional information, please contact J.P. Monroe (jpmorroe@uoregon.edu) at 541-346-2085.

2016-17 FEE INCREASES — PER TERM OR SEMESTER

	2015-16 Academic Year			2016-17 Academic Year			Percentage Change		
	Undergraduate (per Term)	Graduate (per Term)	Law (per Semester)	Undergraduate (per Term)	Graduate (per Term)	Law (per Semester)	Undergraduate (per Term)	Graduate (per Term)	Law (per Semester)
Building Fee	45.00	45.00	68.00	45.00	45.00	68.00	0.00%	0.00%	0.00%
Incidental Fee*	223.75	223.75	336.00	233.75	233.75	352.00	4.47%	4.47%	4.76%
Health Service Fee	161.00	161.00	242.00	173.75	173.75	261.00	7.92%	7.92%	7.85%
Recreation Center Bond	38.00	38.00	57.00	38.00	38.00	57.00	0.00%	0.00%	0.00%
Recreation Center Fee	59.75	59.75	90.00	59.75	59.75	90.00	0.00%	0.00%	0.00%
EMU Fee	67.00	67.00	101.00	67.00	67.00	101.00	0.00%	0.00%	0.00%
Total Fees	594.50	594.50	894.00	617.25	617.25	929.00	3.83%	3.83%	3.91%

Source: UO Office of Institutional Research.

For additional information, please contact J.P. Monroe (jpmorroe@uoregon.edu) at 541-346-2085.

University of Oregon

Academic Year 2016-17 Undergraduate Tuition and Fees

Undergraduate					Undergraduate — Clark Honors College			
<i>Credits</i>	<i>Resident</i>		<i>Nonresident</i>		<i>Resident</i>		<i>Nonresident</i>	
	Tuition	and Fees	Tuition	Fees	Tuition	and Fees	Tuition	Fees
1	198.00	793.25	702.00	1,297.25	1,476.00	2,071.25	1,980.00	2,575.25
2	396.00	993.25	1,404.00	2,001.25	1,674.00	2,271.25	2,682.00	3,279.25
3	594.00	1,193.25	2,106.00	2,705.25	1,872.00	2,471.25	3,384.00	3,983.25
4	792.00	1,393.25	2,808.00	3,409.25	2,070.00	2,671.25	4,086.00	4,687.25
5	990.00	1,593.25	3,510.00	4,113.25	2,268.00	2,871.25	4,788.00	5,391.25
6	1,188.00	1,793.25	4,212.00	4,817.25	2,466.00	3,071.25	5,490.00	6,095.25
7	1,386.00	1,993.25	4,914.00	5,521.25	2,664.00	3,271.25	6,192.00	6,799.25
8	1,584.00	2,193.25	5,616.00	6,225.25	2,862.00	3,471.25	6,894.00	7,503.25
9	1,782.00	2,393.25	6,318.00	6,929.25	3,060.00	3,671.25	7,596.00	8,207.25
10	1,980.00	2,593.25	7,020.00	7,633.25	3,258.00	3,871.25	8,298.00	8,911.25
11	2,178.00	2,793.25	7,722.00	8,337.25	3,456.00	4,071.25	9,000.00	9,615.25
12	2,376.00	2,993.25	8,424.00	9,041.25	3,654.00	4,271.25	9,702.00	10,319.25
13	2,574.00	3,191.25	9,126.00	9,743.25	3,852.00	4,469.25	10,404.00	11,021.25
14	2,772.00	3,389.25	9,828.00	10,445.25	4,050.00	4,667.25	11,106.00	11,723.25
15	2,970.00	3,587.25	10,530.00	11,147.25	4,248.00	4,865.25	11,808.00	12,425.25
16	3,168.00	3,785.25	11,232.00	11,849.25	4,446.00	5,063.25	12,510.00	13,127.25
17	3,366.00	3,983.25	11,934.00	12,551.25	4,644.00	5,261.25	13,212.00	13,829.25
18	3,564.00	4,181.25	12,636.00	13,253.25	4,842.00	5,459.25	13,914.00	14,531.25
<i>Each Add'l Credit Hour</i>		198.00	702.00		198.00	702.00		

Notes:

- (1) A one-time Matriculation fee is assessed on all new and transfer students — \$389 Undergraduate / \$389 Graduate and Law.
- (2) Students coded as international undergraduates will be assessed a \$200 fee during the regular academic year.

Source: UO Office of Institutional Research.

For additional information, please contact J.P. Monroe (jpmorroe@uoregon.edu) at 541-346-2085.

University of Oregon
Summer 2017 Undergraduate Tuition and Fees

Undergraduate				
<i>Credits</i>	<i>Resident</i>		<i>Nonresident</i>	
	Tuition	and Fees	Tuition	Fees
1	226.00	656.50	501.00	931.50
2	389.00	819.50	953.00	1,383.50
3	552.00	982.50	1,405.00	1,835.50
4	715.00	1,145.50	1,857.00	2,287.50
5	878.00	1,308.50	2,309.00	2,739.50
6	1,041.00	1,471.50	2,761.00	3,191.50
7	1,204.00	1,634.50	3,213.00	3,643.50
8	1,367.00	1,797.50	3,665.00	4,095.50
9	1,530.00	1,960.50	4,117.00	4,547.50
10	1,693.00	2,123.50	4,569.00	4,999.50
11	1,856.00	2,286.50	5,021.00	5,451.50
12	2,019.00	2,449.50	5,473.00	5,903.50
13	2,182.00	2,612.50	5,925.00	6,355.50
14	2,345.00	2,775.50	6,377.00	6,807.50
15	2,508.00	2,938.50	6,829.00	7,259.50
16	2,671.00	3,101.50	7,281.00	7,711.50
17	2,834.00	3,264.50	7,733.00	8,163.50
18	2,997.00	3,427.50	8,185.00	8,615.50
<i>Each Add'l Credit Hour</i>				
	163.00		452.00	

Notes:

- (1) A one-time Matriculation fee is assessed on all new and transfer students — \$389 Undergraduate / \$389 Graduate and Law.
- (2) Students coded as international undergraduates will be assessed a \$150 fee during the summer term.

Source: UO Office of Institutional Research.

For additional information, please contact J.P. Monroe (jmonroe@uoregon.edu) at 541-346-2085.

University of Oregon
Academic Year 2016-17 Graduate Tuition Rates

— RESIDENT TUITION RATES

Credits	School of Architecture and Allied Arts		College of Arts and Sciences		College of Business			College of Education			Graduate School	School of Journalism and Communication			School of Music and Dance	School of Law			Envir. & Natural Resources LLM
	Graduate Level 1	Graduate Level 2 - Studio	Masters / Doctoral	MBA	Masters In Accounting	Doctoral Programs	Masters / Doctoral	Masters / Doctoral Supervision	Masters Clinical Science	Master / Doctoral		Media Studies Masters / Doctoral	Graduate Strategic Communication	Graduate Multimedia		Masters / Doctoral	JD (per semester)	Conflict Resolution	
1	825.00	1,086.00	533.00	2,523.00	1,575.00	512.00	1,048.00	1,096.00	1,145.00	533.00	559.00	593.00	593.00	682.00	1,701.00	697.00	2,113.00		
2	1,365.00	1,657.00	1,066.00	3,350.00	2,168.00	1,024.00	1,603.00	1,698.00	1,807.00	1,066.00	1,118.00	1,186.00	1,186.00	1,196.00	3,402.00	1,394.00	4,226.00		
3	1,905.00	2,228.00	1,599.00	4,177.00	2,761.00	1,536.00	2,158.00	2,300.00	2,469.00	1,599.00	1,677.00	1,779.00	1,779.00	1,710.00	5,103.00	2,091.00	6,339.00		
4	2,445.00	2,799.00	2,132.00	5,004.00	3,354.00	2,048.00	2,713.00	2,902.00	3,131.00	2,132.00	2,236.00	2,372.00	2,372.00	2,224.00	6,804.00	2,788.00	8,452.00		
5	2,985.00	3,370.00	2,665.00	5,831.00	3,947.00	2,560.00	3,268.00	3,504.00	3,793.00	2,665.00	2,795.00	2,965.00	2,965.00	2,738.00	8,505.00	3,485.00	10,565.00		
6	3,525.00	3,941.00	3,198.00	6,658.00	4,540.00	3,072.00	3,823.00	4,106.00	4,455.00	3,198.00	3,354.00	3,558.00	3,558.00	3,252.00	10,206.00	4,182.00	12,678.00		
7	4,065.00	4,512.00	3,731.00	7,485.00	5,133.00	3,584.00	4,378.00	4,708.00	5,117.00	3,731.00	3,913.00	4,151.00	4,151.00	3,766.00	11,907.00	4,879.00	14,791.00		
8	4,605.00	5,083.00	4,264.00	8,312.00	5,726.00	4,096.00	4,933.00	5,310.00	5,779.00	4,264.00	4,472.00	4,744.00	4,744.00	4,280.00	13,608.00	5,576.00	16,904.00		
9	5,145.00	5,654.00	4,797.00	9,139.00	6,319.00	4,608.00	5,488.00	5,912.00	6,441.00	4,797.00	5,031.00	5,337.00	5,337.00	4,794.00	15,309.00	6,273.00	19,017.00		
10	5,145.00	5,654.00	4,797.00	9,139.00	6,319.00	4,608.00	5,488.00	5,912.00	6,441.00	4,797.00	5,031.00	5,337.00	5,337.00	4,794.00	15,309.00	6,273.00	19,017.00		
11	5,145.00	5,654.00	4,797.00	9,139.00	6,319.00	4,608.00	5,488.00	5,912.00	6,441.00	4,797.00	5,031.00	5,337.00	5,337.00	4,794.00	15,309.00	6,273.00	19,017.00		
12	5,145.00	5,654.00	4,797.00	9,139.00	6,319.00	4,608.00	5,488.00	5,912.00	6,441.00	4,797.00	5,031.00	5,337.00	5,337.00	4,794.00	15,309.00	6,273.00	19,017.00		
13	5,145.00	5,654.00	4,797.00	9,139.00	6,319.00	4,608.00	5,488.00	5,912.00	6,441.00	4,797.00	5,031.00	5,337.00	5,337.00	4,794.00	15,309.00	6,273.00	19,017.00		
14	5,145.00	5,654.00	4,797.00	9,139.00	6,319.00	4,608.00	5,488.00	5,912.00	6,441.00	4,797.00	5,031.00	5,337.00	5,337.00	4,794.00	15,309.00	6,273.00	19,017.00		
15	5,145.00	5,654.00	4,797.00	9,139.00	6,319.00	4,608.00	5,488.00	5,912.00	6,441.00	4,797.00	5,031.00	5,337.00	5,337.00	4,794.00	15,309.00	6,273.00	19,017.00		
16	5,145.00	5,654.00	4,797.00	9,139.00	6,319.00	4,608.00	5,488.00	5,912.00	6,441.00	4,797.00	5,031.00	5,337.00	5,337.00	4,794.00	15,309.00	6,273.00	19,017.00		
17	5,685.00	6,225.00	5,330.00	9,966.00	6,912.00	5,120.00	6,043.00	6,514.00	7,103.00	5,330.00	5,590.00	5,930.00	5,930.00	5,308.00	15,309.00	6,970.00	19,017.00		
18	6,225.00	6,796.00	5,863.00	10,793.00	7,505.00	5,632.00	6,598.00	7,116.00	7,765.00	5,863.00	6,149.00	6,523.00	6,523.00	5,822.00	18,711.00	7,667.00	23,243.00		
<i>Each Add'l Credit Hour</i>		540.00	571.00	533.00	827.00	593.00	512.00	555.00	602.00	662.00	533.00	559.00	593.00	593.00	514.00	1,701.00	697.00	2,113.00	

Notes:

(1) A one-time Matriculation fee is assessed on all new and transfer students — \$389 Undergraduate / \$389 Graduate and Law.

(2) Law and Law LLM students pay per semester rather than per term.

(3) AAA "Level 1" includes Art History, Arts and Administration, Historic Preservation, and Planning, Public Policy and Management.

(4) AAA "Level 2" includes Architecture, Interior Architecture, Art, and Landscape Architecture.

(5) Education "Masters / Doctoral" includes programs in Educational Leadership; Doctoral Programs in Communication Disorders and Sciences, Critical and Socio-Cultural Studies in Education, Special Education and Early Intervention, and Masters Program in Prevention Science.

(6) Education "Masters / Doctoral Supervision" includes Doctoral Programs in Counseling Psychology and School Psychology; Masters Programs in Curriculum and Teaching,

(7) Education "Masters Clinical Science" includes programs in Communication Disorders and Sciences and Couples and Family Therapy.

(8) Journalism and Communication's professional Master's program falls under Media Studies.

Source: UO Office of Institutional Research.

For additional information, please contact J.P. Monroe (jpmorroe@uoregon.edu) at 541-346-2085.

University of Oregon
Academic Year 2016-17 Graduate Tuition Rates

— NONRESIDENT TUITION RATES

Credits	School of Architecture and Allied Arts		College of Arts and Sciences		College of Business			College of Education			Graduate School	School of Journalism and Communication			School of Music and Dance	School of Law			Envir. & Natural Resources LLM
	Graduate Level 1	Graduate Level 2 - Studio	Masters / Doctoral	MBA	Masters In Accounting	Doctoral Programs	Masters / Doctoral	Masters / Doctoral Supervision	Masters Clinical Science	Master / Doctoral		Media Studies Masters / Doctoral	Graduate Strategic Communication	Graduate Multimedia		Masters / Doctoral	JD (per semester)	Conflict Resolution	
1	1,172.00	1,541.00	917.00	2,976.00	1,877.00	853.00	1,304.00	1,350.00	1,397.00	917.00	905.00	905.00	905.00	985.00	2,141.00	942.00	2,113.00		
2	2,042.00	2,479.00	1,834.00	4,185.00	2,760.00	1,706.00	2,116.00	2,207.00	2,312.00	1,834.00	1,810.00	1,810.00	1,810.00	1,794.00	4,282.00	1,884.00	4,226.00		
3	2,912.00	3,417.00	2,751.00	5,394.00	3,643.00	2,559.00	2,928.00	3,064.00	3,227.00	2,751.00	2,715.00	2,715.00	2,715.00	2,603.00	6,423.00	2,826.00	6,339.00		
4	3,782.00	4,355.00	3,668.00	6,603.00	4,526.00	3,412.00	3,740.00	3,921.00	4,142.00	3,668.00	3,620.00	3,620.00	3,620.00	3,412.00	8,564.00	3,768.00	8,452.00		
5	4,652.00	5,293.00	4,585.00	7,812.00	5,409.00	4,265.00	4,552.00	4,778.00	5,057.00	4,585.00	4,525.00	4,525.00	4,525.00	4,221.00	10,705.00	4,710.00	10,565.00		
6	5,522.00	6,231.00	5,502.00	9,021.00	6,292.00	5,118.00	5,364.00	5,635.00	5,972.00	5,502.00	5,430.00	5,430.00	5,430.00	5,030.00	12,846.00	5,652.00	12,678.00		
7	6,392.00	7,169.00	6,419.00	10,230.00	7,175.00	5,971.00	6,176.00	6,492.00	6,887.00	6,419.00	6,335.00	6,335.00	6,335.00	5,839.00	14,987.00	6,594.00	14,791.00		
8	7,262.00	8,107.00	7,336.00	11,439.00	8,058.00	6,824.00	6,988.00	7,349.00	7,802.00	7,336.00	7,240.00	7,240.00	7,240.00	6,648.00	17,128.00	7,536.00	16,904.00		
9	8,132.00	9,045.00	8,253.00	12,648.00	8,941.00	7,677.00	7,800.00	8,206.00	8,717.00	8,253.00	8,145.00	8,145.00	8,145.00	7,457.00	19,269.00	8,478.00	19,017.00		
10	8,132.00	9,045.00	8,253.00	12,648.00	8,941.00	7,677.00	7,800.00	8,206.00	8,717.00	8,253.00	8,145.00	8,145.00	8,145.00	7,457.00	19,269.00	8,478.00	19,017.00		
11	8,132.00	9,045.00	8,253.00	12,648.00	8,941.00	7,677.00	7,800.00	8,206.00	8,717.00	8,253.00	8,145.00	8,145.00	8,145.00	7,457.00	19,269.00	8,478.00	19,017.00		
12	8,132.00	9,045.00	8,253.00	12,648.00	8,941.00	7,677.00	7,800.00	8,206.00	8,717.00	8,253.00	8,145.00	8,145.00	8,145.00	7,457.00	19,269.00	8,478.00	19,017.00		
13	8,132.00	9,045.00	8,253.00	12,648.00	8,941.00	7,677.00	7,800.00	8,206.00	8,717.00	8,253.00	8,145.00	8,145.00	8,145.00	7,457.00	19,269.00	8,478.00	19,017.00		
14	8,132.00	9,045.00	8,253.00	12,648.00	8,941.00	7,677.00	7,800.00	8,206.00	8,717.00	8,253.00	8,145.00	8,145.00	8,145.00	7,457.00	19,269.00	8,478.00	19,017.00		
15	8,132.00	9,045.00	8,253.00	12,648.00	8,941.00	7,677.00	7,800.00	8,206.00	8,717.00	8,253.00	8,145.00	8,145.00	8,145.00	7,457.00	19,269.00	8,478.00	19,017.00		
16	8,132.00	9,045.00	8,253.00	12,648.00	8,941.00	7,677.00	7,800.00	8,206.00	8,717.00	8,253.00	8,145.00	8,145.00	8,145.00	7,457.00	19,269.00	8,478.00	19,017.00		
17	9,002.00	9,983.00	9,170.00	13,857.00	9,824.00	8,530.00	8,612.00	9,063.00	9,632.00	9,170.00	9,050.00	9,050.00	9,050.00	8,266.00	19,269.00	9,420.00	19,017.00		
18	9,872.00	10,921.00	10,087.00	15,066.00	10,707.00	9,383.00	9,424.00	9,920.00	10,547.00	10,087.00	9,955.00	9,955.00	9,955.00	9,075.00	23,551.00	10,362.00	23,243.00		
<i>Each Add'l Credit Hour</i>		870.00	938.00	917.00	1,209.00	883.00	853.00	812.00	857.00	915.00	917.00	905.00	905.00	905.00	809.00	2,141.00	942.00	2,113.00	

Notes:

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(3) AAA "Level 1" includes Art History, Arts and Administration, Historic Preservation, and Planning, Public Policy and Management.

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(7) Education "Masters Clinical Science" includes programs in Communication Disorders and Sciences and Couples and Family Therapy.

(8) Journalism and Communication's professional Master's program falls under Media Studies.

Source: UO Office of Institutional Research.

For additional information, please contact J.P. Monroe (jpmorroe@uoregon.edu) at 541-346-2085.

University of Oregon
Summer 2017 Graduate Tuition Rates

— RESIDENT TUITION RATES

Credits	School of Architecture and Allied Arts		College of Arts and Sciences		College of Business			College of Education			Graduate School	School of Journalism and Communication			School of Music and Dance	School of Law			Envir. & Natural Resources LLM
	Graduate Level 1	Graduate Level 2 - Studio	Masters / Doctoral	MBA	Masters In Accounting	Doctoral Programs	Masters / Doctoral	Masters / Doctoral Supervision	Masters Clinical Science	Master / Doctoral	Media Studies Masters / Doctoral	Graduate Strategic Communication	Graduate Multimedia	Masters / Doctoral	JD	Conflict Resolution			
1	466.00	593.00	383.00	1,252.00	853.00	371.00	605.00	634.00	684.00	383.00	399.00	420.00	420.00	390.00	1,429.00	697.00	2,113.00		
2	794.00	936.00	694.00	1,780.00	1,220.00	670.00	954.00	1,011.00	1,106.00	694.00	726.00	768.00	768.00	701.00	2,858.00	1,394.00	4,226.00		
3	1,122.00	1,279.00	1,005.00	2,308.00	1,587.00	969.00	1,303.00	1,388.00	1,528.00	1,005.00	1,053.00	1,116.00	1,116.00	1,012.00	4,287.00	2,091.00	6,339.00		
4	1,450.00	1,622.00	1,316.00	2,836.00	1,954.00	1,268.00	1,652.00	1,765.00	1,950.00	1,316.00	1,380.00	1,464.00	1,464.00	1,323.00	5,716.00	2,788.00	8,452.00		
5	1,778.00	1,965.00	1,627.00	3,364.00	2,321.00	1,567.00	2,001.00	2,142.00	2,372.00	1,627.00	1,707.00	1,812.00	1,812.00	1,634.00	7,145.00	3,485.00	10,565.00		
6	2,106.00	2,308.00	1,938.00	3,892.00	2,688.00	1,866.00	2,350.00	2,519.00	2,794.00	1,938.00	2,034.00	2,160.00	2,160.00	1,945.00	8,574.00	4,182.00	12,678.00		
7	2,434.00	2,651.00	2,249.00	4,420.00	3,055.00	2,165.00	2,699.00	2,896.00	3,216.00	2,249.00	2,361.00	2,508.00	2,508.00	2,256.00	10,003.00	4,879.00	14,791.00		
8	2,762.00	2,994.00	2,560.00	4,948.00	3,422.00	2,464.00	3,048.00	3,273.00	3,638.00	2,560.00	2,688.00	2,856.00	2,856.00	2,567.00	11,432.00	5,576.00	16,904.00		
9	3,090.00	3,337.00	2,871.00	5,476.00	3,789.00	2,763.00	3,397.00	3,650.00	4,060.00	2,871.00	3,015.00	3,204.00	3,204.00	2,878.00	12,861.00	6,273.00	19,017.00		
10	3,418.00	3,680.00	3,182.00	6,004.00	4,156.00	3,062.00	3,746.00	4,027.00	4,482.00	3,182.00	3,342.00	3,552.00	3,552.00	3,189.00	14,290.00	6,970.00	19,017.00		
11	3,746.00	4,023.00	3,493.00	6,532.00	4,523.00	3,361.00	4,095.00	4,404.00	4,904.00	3,493.00	3,669.00	3,900.00	3,900.00	3,500.00	15,719.00	7,667.00	19,017.00		
12	4,074.00	4,366.00	3,804.00	7,060.00	4,890.00	3,660.00	4,444.00	4,781.00	5,326.00	3,804.00	3,996.00	4,248.00	4,248.00	3,811.00	17,148.00	8,364.00	19,017.00		
13	4,402.00	4,709.00	4,115.00	7,588.00	5,257.00	3,959.00	4,793.00	5,158.00	5,748.00	4,115.00	4,323.00	4,596.00	4,596.00	4,122.00	18,577.00	9,061.00	19,017.00		
14	4,730.00	5,052.00	4,426.00	8,116.00	5,624.00	4,258.00	5,142.00	5,535.00	6,170.00	4,426.00	4,650.00	4,944.00	4,944.00	4,433.00	20,006.00	9,758.00	19,017.00		
15	5,058.00	5,395.00	4,737.00	8,644.00	5,991.00	4,557.00	5,491.00	5,912.00	6,592.00	4,737.00	4,977.00	5,292.00	5,292.00	4,744.00	21,435.00	10,455.00	19,017.00		
16	5,386.00	5,738.00	5,048.00	9,172.00	6,358.00	4,856.00	5,840.00	6,289.00	7,014.00	5,048.00	5,304.00	5,640.00	5,640.00	5,055.00	22,864.00	11,152.00	19,017.00		
17	5,714.00	6,081.00	5,359.00	9,700.00	6,725.00	5,155.00	6,189.00	6,666.00	7,436.00	5,359.00	5,631.00	5,988.00	5,988.00	5,366.00	24,293.00	11,849.00	19,017.00		
18	6,042.00	6,424.00	5,670.00	10,228.00	7,092.00	5,454.00	6,538.00	7,043.00	7,858.00	5,670.00	5,958.00	6,336.00	6,336.00	5,677.00	25,722.00	12,546.00	23,243.00		
<i>Each Add'l Credit Hour</i>		328.00	343.00	311.00	528.00	367.00	299.00	349.00	377.00	422.00	311.00	327.00	348.00	348.00	311.00	1,429.00	697.00	2,113.00	

Notes:

- (1) A one-time Matriculation fee is assessed on all new and transfer students — \$389 Undergraduate / \$389 Graduate and Law.
- (2) AAA "Level 1" includes Art History, Arts and Administration, Historic Preservation, and Planning, Public Policy and Management.
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- (4) Education "Masters / Doctoral" includes programs in Educational Leadership, Doctoral Programs in Communication Disorders and Sciences, Critical and Socio-Cultural Studies in Education, and Special Education and Early Intervention.
- (5) Education "Masters / Doctoral" includes programs in Educational Leadership; Doctoral Programs in Communication Disorders and Sciences, Critical and Socio-Cultural Studies in Education, Special Education and Early Intervention, and Masters Program in Prevention Science.
- (6) Source: UO Office of Institutional Research.
- (7) Journalism and Communication's professional Master's program falls under Media Studies.

For additional information, please contact J.P. Monroe (jpmorroe@uoregon.edu) at 541-346-2085.

University of Oregon

Summer 2017 Graduate Tuition Rates

— NONRESIDENT TUITION RATES

Credits	School of Architecture and Allied Arts		College of Arts and Sciences		College of Business			College of Education			Graduate School	School of Journalism and Communication			School of Music and Dance	School of Law			Envir. & Natural Resources LLM
	Graduate Level 1	Graduate Level 2 - Studio	Masters / Doctoral	MBA	Masters In Accounting	Doctoral Programs	Masters / Doctoral	Masters / Doctoral Supervision	Masters Clinical Science	Master / Doctoral	Media Studies Masters / Doctoral	Graduate Strategic Communication	Graduate Multimedia	Masters / Doctoral	JD	Conflict Resolution			
1	583.00	706.00	526.00	1,384.00	951.00	494.00	677.00	700.00	743.00	526.00	519.00	519.00	519.00	496.00	1,557.00	942.00	2,113.00		
2	1,018.00	1,145.00	974.00	2,002.00	1,392.00	910.00	1,094.00	1,139.00	1,222.00	974.00	960.00	960.00	960.00	900.00	3,114.00	1,884.00	4,226.00		
3	1,453.00	1,584.00	1,422.00	2,620.00	1,833.00	1,326.00	1,511.00	1,578.00	1,701.00	1,422.00	1,401.00	1,401.00	1,401.00	1,304.00	4,671.00	2,826.00	6,339.00		
4	1,888.00	2,023.00	1,870.00	3,238.00	2,274.00	1,742.00	1,928.00	2,017.00	2,180.00	1,870.00	1,842.00	1,842.00	1,842.00	1,708.00	6,228.00	3,768.00	8,452.00		
5	2,323.00	2,462.00	2,318.00	3,856.00	2,715.00	2,158.00	2,345.00	2,456.00	2,659.00	2,318.00	2,283.00	2,283.00	2,283.00	2,112.00	7,785.00	4,710.00	10,565.00		
6	2,758.00	2,901.00	2,766.00	4,474.00	3,156.00	2,574.00	2,762.00	2,895.00	3,138.00	2,766.00	2,724.00	2,724.00	2,724.00	2,516.00	9,342.00	5,652.00	12,678.00		
7	3,193.00	3,340.00	3,214.00	5,092.00	3,597.00	2,990.00	3,179.00	3,334.00	3,617.00	3,214.00	3,165.00	3,165.00	3,165.00	2,920.00	10,899.00	6,594.00	14,791.00		
8	3,628.00	3,779.00	3,662.00	5,710.00	4,038.00	3,406.00	3,596.00	3,773.00	4,096.00	3,662.00	3,606.00	3,606.00	3,606.00	3,324.00	12,456.00	7,536.00	16,904.00		
9	4,063.00	4,218.00	4,110.00	6,328.00	4,479.00	3,822.00	4,013.00	4,212.00	4,575.00	4,110.00	4,047.00	4,047.00	4,047.00	3,728.00	14,013.00	8,478.00	19,017.00		
10	4,498.00	4,657.00	4,558.00	6,946.00	4,920.00	4,238.00	4,430.00	4,651.00	5,054.00	4,558.00	4,488.00	4,488.00	4,488.00	4,132.00	15,570.00	9,420.00	19,017.00		
11	4,933.00	5,096.00	5,006.00	7,564.00	5,361.00	4,654.00	4,847.00	5,090.00	5,533.00	5,006.00	4,929.00	4,929.00	4,929.00	4,536.00	17,127.00	10,362.00	19,017.00		
12	5,368.00	5,535.00	5,454.00	8,182.00	5,802.00	5,070.00	5,264.00	5,529.00	6,012.00	5,454.00	5,370.00	5,370.00	5,370.00	4,940.00	18,684.00	11,304.00	19,017.00		
13	5,803.00	5,974.00	5,902.00	8,800.00	6,243.00	5,486.00	5,681.00	5,968.00	6,491.00	5,902.00	5,811.00	5,811.00	5,811.00	5,344.00	20,241.00	12,246.00	19,017.00		
14	6,238.00	6,413.00	6,350.00	9,418.00	6,684.00	5,902.00	6,098.00	6,407.00	6,970.00	6,350.00	6,252.00	6,252.00	6,252.00	5,748.00	21,798.00	13,188.00	19,017.00		
15	6,673.00	6,852.00	6,798.00	10,036.00	7,125.00	6,318.00	6,515.00	6,846.00	7,449.00	6,798.00	6,693.00	6,693.00	6,693.00	6,152.00	23,355.00	14,130.00	19,017.00		
16	7,108.00	7,291.00	7,246.00	10,654.00	7,566.00	6,734.00	6,932.00	7,285.00	7,928.00	7,246.00	7,134.00	7,134.00	7,134.00	6,556.00	24,912.00	15,072.00	19,017.00		
17	7,543.00	7,730.00	7,694.00	11,272.00	8,007.00	7,150.00	7,349.00	7,724.00	8,407.00	7,694.00	7,575.00	7,575.00	7,575.00	6,960.00	26,469.00	16,014.00	19,017.00		
18	7,978.00	8,169.00	8,142.00	11,890.00	8,448.00	7,566.00	7,766.00	8,163.00	8,886.00	8,142.00	8,016.00	8,016.00	8,016.00	7,364.00	28,026.00	16,956.00	23,243.00		
Each Add'l Credit Hour	435.00	439.00	448.00	618.00	441.00	416.00	417.00	439.00	479.00	448.00	441.00	441.00	441.00	404.00	1,557.00	942.00	2,113.00		

Notes:

- (1) A one-time Matriculation fee is assessed on all new and transfer students — \$389 Undergraduate / \$389 Graduate and Law.
- (2) AAA "Level 1" includes Art History, Arts and Administration, Historic Preservation, and Planning, Public Policy and Management.
- (3) AAA "Level 2" includes Architecture, Interior Architecture, Art, and Landscape Architecture.
- (4) Education "Masters / Doctoral" includes programs in Educational Leadership, Doctoral Programs in Communication Disorders and Sciences, Critical and Socio-Cultural Studies in Education, and Special Education and Early Intervention.
- (5) Education "Masters / Doctoral" includes programs in Educational Leadership; Doctoral Programs in Communication Disorders and Sciences, Critical and Socio-Cultural Studies in Education, Special Education and Early Intervention, and Masters Program in Prevention Science.
- (6) Education "Masters Clinical Science" includes programs in Communication Disorders and Sciences and Couples and Family Therapy.
- (7) Journalism and Communication's professional Master's program falls under Media Studies.

Source: UO Office of Institutional Research.

For additional information, please contact J.P. Monroe (jpmonee@uoregon.edu) at 541-346-2085.

University of Oregon
Academic Year 2016-17 Mandatory Fees

— UNDERGRADUATE (PER TERM)

Credits	Building Fee	Incidental Fee	Health Service Fee	Recreation Center Bond	Recreation Center Fee	EMU Fee	Total Fees
1	23.00	233.75	173.75	38.00	59.75	67.00	595.25
2	25.00	233.75	173.75	38.00	59.75	67.00	597.25
3	27.00	233.75	173.75	38.00	59.75	67.00	599.25
4	29.00	233.75	173.75	38.00	59.75	67.00	601.25
5	31.00	233.75	173.75	38.00	59.75	67.00	603.25
6	33.00	233.75	173.75	38.00	59.75	67.00	605.25
7	35.00	233.75	173.75	38.00	59.75	67.00	607.25
8	37.00	233.75	173.75	38.00	59.75	67.00	609.25
9	39.00	233.75	173.75	38.00	59.75	67.00	611.25
10	41.00	233.75	173.75	38.00	59.75	67.00	613.25
11	43.00	233.75	173.75	38.00	59.75	67.00	615.25
12 or more	45.00	233.75	173.75	38.00	59.75	67.00	617.25

— GRADUATE (PER TERM)

Credits	Building Fee	Incidental Fee	Health Service Fee	Recreation Center Bond	Recreation Center Fee	EMU Fee	Total Fees
1	23.00	233.75	173.75	38.00	59.75	67.00	595.25
2	25.00	233.75	173.75	38.00	59.75	67.00	597.25
3	28.00	233.75	173.75	38.00	59.75	67.00	600.25
4	31.00	233.75	173.75	38.00	59.75	67.00	603.25
5	34.00	233.75	173.75	38.00	59.75	67.00	606.25
6	37.00	233.75	173.75	38.00	59.75	67.00	609.25
7	40.00	233.75	173.75	38.00	59.75	67.00	612.25
8	43.00	233.75	173.75	38.00	59.75	67.00	615.25
9	45.00	233.75	173.75	38.00	59.75	67.00	617.25
10	45.00	233.75	173.75	38.00	59.75	67.00	617.25
11	45.00	233.75	173.75	38.00	59.75	67.00	617.25
12 or more	45.00	233.75	173.75	38.00	59.75	67.00	617.25

— LAW (PER SEMESTER)

Credits	Building Fee	Incidental Fee	Health Service Fee	Recreation Center Bond	Recreation Center Fee	EMU Fee	Total Fees
1	35.00	351.00	261.00	57.00	90.00	101.00	895.00
2	38.00	351.00	261.00	57.00	90.00	101.00	898.00
3	42.00	351.00	261.00	57.00	90.00	101.00	902.00
4	47.00	351.00	261.00	57.00	90.00	101.00	907.00
5	51.00	351.00	261.00	57.00	90.00	101.00	911.00
6	56.00	351.00	261.00	57.00	90.00	101.00	916.00
7	60.00	351.00	261.00	57.00	90.00	101.00	920.00
8	65.00	351.00	261.00	57.00	90.00	101.00	925.00
9	68.00	351.00	261.00	57.00	90.00	101.00	928.00
10	68.00	351.00	261.00	57.00	90.00	101.00	928.00
11	68.00	351.00	261.00	57.00	90.00	101.00	928.00
12 or more	68.00	351.00	261.00	57.00	90.00	101.00	928.00

Notes:

- (1) During the regular academic year, law students on semesters pay 150% of the academic fee.
- (2) A one-time Matriculation fee is assessed on all new and transfer students — \$389 Undergraduate / \$389 Graduate and Law.
- (3) Students enrolled in off-campus programs (OIMB and Portland only) are assessed 50% of the Incidental fee.
- (4) Qualified tuition and fees do not include student health insurance fees for Tax Relief Act reporting.
- (5) Students enrolled in the Portland programs use the Portland State University Student Health Center, and pay the same Health Service Fee as PSU students.
- (6) Students coded as international undergraduates will be assessed a \$200 fee during the regular academic year.

Source: UO Office of Institutional Research.

For additional information, please contact J.P. Monroe (jpmorroe@uoregon.edu) at 541-346-2085.

**University of Oregon
Summer 2017 Mandatory Fees**

— UNDERGRADUATE (SUMMER TERM)

Credits	Building Fee	Incidental Fee	Health Service Fee	Recreation Center Bond	Recreation Center Fee	EMU Fee	Total Fees
1	34.00	58.00	173.75	38.00	59.75	67.00	430.50
2	34.00	58.00	173.75	38.00	59.75	67.00	430.50
3	34.00	58.00	173.75	38.00	59.75	67.00	430.50
4	34.00	58.00	173.75	38.00	59.75	67.00	430.50
5	34.00	58.00	173.75	38.00	59.75	67.00	430.50
6	34.00	58.00	173.75	38.00	59.75	67.00	430.50
7	34.00	58.00	173.75	38.00	59.75	67.00	430.50
8	34.00	58.00	173.75	38.00	59.75	67.00	430.50
9	34.00	58.00	173.75	38.00	59.75	67.00	430.50
10	34.00	58.00	173.75	38.00	59.75	67.00	430.50
11	34.00	58.00	173.75	38.00	59.75	67.00	430.50
12 or more	34.00	58.00	173.75	38.00	59.75	67.00	430.50

— GRADUATE (SUMMER TERM)

Credits	Building Fee	Incidental Fee	Health Service Fee	Recreation Center Bond	Recreation Center Fee	EMU Fee	Total Fees
1	34.00	58.00	173.75	38.00	59.75	67.00	430.50
2	34.00	58.00	173.75	38.00	59.75	67.00	430.50
3	34.00	58.00	173.75	38.00	59.75	67.00	430.50
4	34.00	58.00	173.75	38.00	59.75	67.00	430.50
5	34.00	58.00	173.75	38.00	59.75	67.00	430.50
6	34.00	58.00	173.75	38.00	59.75	67.00	430.50
7	34.00	58.00	173.75	38.00	59.75	67.00	430.50
8	34.00	58.00	173.75	38.00	59.75	67.00	430.50
9	34.00	58.00	173.75	38.00	59.75	67.00	430.50
10	34.00	58.00	173.75	38.00	59.75	67.00	430.50
11	34.00	58.00	173.75	38.00	59.75	67.00	430.50
12 or more	34.00	58.00	173.75	38.00	59.75	67.00	430.50

— LAW (SUMMER TERM)

Credits	Building Fee	Incidental Fee	Health Service Fee	Recreation Center Bond	Recreation Center Fee	EMU Fee	Total Fees
1	34.00	58.00	173.75	38.00	59.75	67.00	430.50
2	34.00	58.00	173.75	38.00	59.75	67.00	430.50
3	34.00	58.00	173.75	38.00	59.75	67.00	430.50
4	34.00	58.00	173.75	38.00	59.75	67.00	430.50
5	34.00	58.00	173.75	38.00	59.75	67.00	430.50
6	34.00	58.00	173.75	38.00	59.75	67.00	430.50
7	34.00	58.00	173.75	38.00	59.75	67.00	430.50
8	34.00	58.00	173.75	38.00	59.75	67.00	430.50
9	34.00	58.00	173.75	38.00	59.75	67.00	430.50
10	34.00	58.00	173.75	38.00	59.75	67.00	430.50
11	34.00	58.00	173.75	38.00	59.75	67.00	430.50
12 or more	34.00	58.00	173.75	38.00	59.75	67.00	430.50

Source: UO Office of Institutional Research.

For additional information, please contact J.P. Monroe (jpmorroe@uoregon.edu) at 541-346-2085.

UNIVERSITY of OREGON

2016-17 Academic Year Part-Time, Non-Matriculated Student Tuition and Required Fees - Per Term

Combination Course Level

Part-Time Students 1 - 8 Credit Hours	Course Level 100-499		Course Level 500 Plus		Total Tuition & Fees							
	Credit Hour	Tuition	Credit Hour	Tuition		Total Tuition	Building Fee	Inci- dental Fee	Health Service Fee	Rec Center Bond	Rec Center Fee	EMU Fee
1	1	198.00	0	0.00	198.00	23.00	233.75	-na-	38.00	59.75	67.00	619.50
	0	0.00	1	533.00	533.00	23.00	233.75	-na-	38.00	59.75	67.00	954.50
2	2	396.00	0	0.00	396.00	25.00	233.75	-na-	38.00	59.75	67.00	819.50
	0	0.00	2	1,066.00	1,066.00	25.00	233.75	-na-	38.00	59.75	67.00	1,489.50
	1	198.00	1	533.00	731.00	25.00	233.75	-na-	38.00	59.75	67.00	1,154.50
3	3	594.00	0	0.00	594.00	27.00	233.75	-na-	38.00	59.75	67.00	1,019.50
	0	0.00	3	1,599.00	1,599.00	27.00	233.75	-na-	38.00	59.75	67.00	2,024.50
	1	198.00	2	1,066.00	1,264.00	27.00	233.75	-na-	38.00	59.75	67.00	1,689.50
	2	396.00	1	533.00	929.00	27.00	233.75	-na-	38.00	59.75	67.00	1,354.50
4	4	792.00	0	0.00	792.00	29.00	233.75	-na-	38.00	59.75	67.00	1,219.50
	0	0.00	4	2,132.00	2,132.00	29.00	233.75	-na-	38.00	59.75	67.00	2,559.50
	1	198.00	3	1,599.00	1,797.00	29.00	233.75	-na-	38.00	59.75	67.00	2,224.50
	2	396.00	2	1,066.00	1,462.00	29.00	233.75	-na-	38.00	59.75	67.00	1,889.50
	3	594.00	1	533.00	1,127.00	29.00	233.75	-na-	38.00	59.75	67.00	1,554.50
5	5	990.00	0	0.00	990.00	31.00	233.75	-na-	38.00	59.75	67.00	1,419.50
	0	0.00	5	2,665.00	2,665.00	31.00	233.75	-na-	38.00	59.75	67.00	3,094.50
	1	198.00	4	2,132.00	2,330.00	31.00	233.75	-na-	38.00	59.75	67.00	2,759.50
	2	396.00	3	1,599.00	1,995.00	31.00	233.75	-na-	38.00	59.75	67.00	2,424.50
	3	594.00	2	1,066.00	1,660.00	31.00	233.75	-na-	38.00	59.75	67.00	2,089.50
	4	792.00	1	533.00	1,325.00	31.00	233.75	-na-	38.00	59.75	67.00	1,754.50
6	6	1,188.00	0	0.00	1,188.00	33.00	233.75	-na-	38.00	59.75	67.00	1,619.50
	0	0.00	6	3,198.00	3,198.00	33.00	233.75	-na-	38.00	59.75	67.00	3,629.50
	1	198.00	5	2,665.00	2,863.00	33.00	233.75	-na-	38.00	59.75	67.00	3,294.50
	2	396.00	4	2,132.00	2,528.00	33.00	233.75	-na-	38.00	59.75	67.00	2,959.50
	3	594.00	3	1,599.00	2,193.00	33.00	233.75	-na-	38.00	59.75	67.00	2,624.50
	4	792.00	2	1,066.00	1,858.00	33.00	233.75	-na-	38.00	59.75	67.00	2,289.50
	5	990.00	1	533.00	1,523.00	33.00	233.75	-na-	38.00	59.75	67.00	1,954.50
7	7	1,386.00	0	0.00	1,386.00	35.00	233.75	-na-	38.00	59.75	67.00	1,819.50
	0	0.00	7	3,731.00	3,731.00	35.00	233.75	-na-	38.00	59.75	67.00	4,164.50
	1	198.00	6	3,198.00	3,396.00	35.00	233.75	-na-	38.00	59.75	67.00	3,825.50

UNIVERSITY of OREGON

2016-17 Academic Year Part-Time, Non-Matriculated Student Tuition and Required Fees - Per Term

Combination Course Level

Part-Time Students 1 - 8 Credit Hours	Course Level 100-499		Course Level 500 Plus		Total Tuition & Fees						
	Credit Hour	Tuition	Credit Hour	Tuition		Inci- dental Fee	Health Service Fee	Rec Center Bond	Rec Center Fee	EMU Fee	
				Total Tuition	Building Fee						
	2	396.00	5	2,665.00	3,061.00	35.00	233.75	-na-	38.00	59.75	67.00 3,494.50
	3	594.00	4	2,132.00	2,726.00	35.00	233.75	-na-	38.00	59.75	67.00 3,159.50
	4	792.00	3	1,599.00	2,391.00	35.00	233.75	-na-	38.00	59.75	67.00 2,824.50
	5	990.00	2	1,066.00	2,056.00	35.00	233.75	-na-	38.00	59.75	67.00 2,489.50
	6	1,188.00	1	533.00	1,721.00	35.00	233.75	-na-	38.00	59.75	67.00 2,154.50
8	8	1,584.00	0	0.00	1,584.00	37.00	233.75	-na-	38.00	59.75	67.00 2,019.50
	0	0.00	8	4,264.00	4,264.00	37.00	233.75	-na-	38.00	59.75	67.00 4,699.50
	1	198.00	7	3,731.00	3,929.00	37.00	233.75	-na-	38.00	59.75	67.00 4,364.50
	2	396.00	6	3,198.00	3,594.00	37.00	233.75	-na-	38.00	59.75	67.00 4,029.50
	3	594.00	5	2,665.00	3,259.00	37.00	233.75	-na-	38.00	59.75	67.00 3,694.50
	4	792.00	4	2,132.00	2,924.00	37.00	233.75	-na-	38.00	59.75	67.00 3,359.50
	5	990.00	3	1,599.00	2,589.00	37.00	233.75	-na-	38.00	59.75	67.00 3,024.50
	6	1,188.00	2	1,066.00	2,254.00	37.00	233.75	-na-	38.00	59.75	67.00 2,689.50
	7	1,386.00	1	533.00	1,919.00	37.00	233.75	-na-	38.00	59.75	67.00 2,354.50
9	9	1,782.00	0	0.00	1,782.00	39.00	233.75	-na-	38.00	59.75	67.00 2,219.50
	0	0.00	9	4,797.00	4,797.00	39.00	233.75	-na-	38.00	59.75	67.00 5,234.50
	1	198.00	8	4,264.00	4,462.00	39.00	233.75	-na-	38.00	59.75	67.00 4,899.50
	2	396.00	7	3,731.00	4,127.00	39.00	233.75	-na-	38.00	59.75	67.00 4,564.50
	3	594.00	6	3,198.00	3,792.00	39.00	233.75	-na-	38.00	59.75	67.00 4,229.50
	4	792.00	5	2,665.00	3,457.00	39.00	233.75	-na-	38.00	59.75	67.00 3,894.50
	5	990.00	4	2,132.00	3,122.00	39.00	233.75	-na-	38.00	59.75	67.00 3,559.50
	6	1,188.00	3	1,599.00	2,787.00	39.00	233.75	-na-	38.00	59.75	67.00 3,224.50
	7	1,386.00	2	1,066.00	2,452.00	39.00	233.75	-na-	38.00	59.75	67.00 2,889.50
10	8	1,584.00	1	533.00	2,117.00	39.00	233.75	-na-	38.00	59.75	67.00 2,554.50
	10	1,980.00	0	0.00	1,980.00	41.00	233.75	-na-	38.00	59.75	67.00 2,419.50
	0	0.00	10	5,330.00	5,330.00	41.00	233.75	-na-	38.00	59.75	67.00 5,769.50
	1	198.00	9	4,797.00	4,995.00	41.00	233.75	-na-	38.00	59.75	67.00 5,434.50
	2	396.00	8	4,264.00	4,660.00	41.00	233.75	-na-	38.00	59.75	67.00 5,099.50
	3	594.00	7	3,731.00	4,325.00	41.00	233.75	-na-	38.00	59.75	67.00 4,764.50
	4	792.00	6	3,198.00	3,990.00	41.00	233.75	-na-	38.00	59.75	67.00 4,429.50
	5	990.00	5	2,665.00	3,655.00	41.00	233.75	-na-	38.00	59.75	67.00 4,094.50
	6	1,188.00	4	2,132.00	3,320.00	41.00	233.75	-na-	38.00	59.75	67.00 3,759.50
	7	1,386.00	3	1,599.00	2,985.00	41.00	233.75	-na-	38.00	59.75	67.00 3,424.50
	8	1,584.00	2	1,066.00	2,650.00	41.00	233.75	-na-	38.00	59.75	67.00 3,085.50

UNIVERSITY of OREGON

2016-17 Academic Year Part-Time, Non-Matriculated Student Tuition and Required Fees - Per Term

Combination Course Level

Part-Time Students 1 - 8 Credit Hours	<i>Course Level</i>		<i>Course Level</i>		Building Fee	Inci- dental Fee	Health Service Fee	Rec Center Bond	Rec Center Fee	EMU Fee	Total Tuition & Fees							
	<i>100-499</i>		<i>500 Plus</i>															
	Credit Hour	Tuition	Credit Hour	Tuition														
	9	1,782.00	1	533.00	2,315.00	41.00	233.75	-na-	38.00	59.75	67.00 2,754.50							
11	11	2,178.00	0	0.00	2,178.00	43.00	233.75	-na-	38.00	59.75	67.00 2,619.50							
	0	0.00	11	5,863.00	5,863.00	43.00	233.75	-na-	38.00	59.75	67.00 6,304.50							
	1	198.00	10	5,330.00	5,528.00	43.00	233.75	-na-	38.00	59.75	67.00 5,969.50							
	2	396.00	9	4,797.00	5,193.00	43.00	233.75	-na-	38.00	59.75	67.00 5,634.50							
	3	594.00	8	4,264.00	4,858.00	43.00	233.75	-na-	38.00	59.75	67.00 5,299.50							
	4	792.00	7	3,731.00	4,523.00	43.00	233.75	-na-	38.00	59.75	67.00 4,964.50							
	5	990.00	6	3,198.00	4,188.00	43.00	233.75	-na-	38.00	59.75	67.00 4,629.50							
	6	1,188.00	5	2,665.00	3,853.00	43.00	233.75	-na-	38.00	59.75	67.00 4,294.50							
	7	1,386.00	4	2,132.00	3,518.00	43.00	233.75	-na-	38.00	59.75	67.00 3,959.50							
	8	1,584.00	3	1,599.00	3,183.00	43.00	233.75	-na-	38.00	59.75	67.00 3,624.50							
12	9	1,782.00	2	1,066.00	2,848.00	43.00	233.75	-na-	38.00	59.75	67.00 3,289.50							
	10	1,980.00	1	533.00	2,513.00	43.00	233.75	-na-	38.00	59.75	67.00 2,954.50							
	12	2,376.00	0	0.00	2,376.00	45.00	233.75	-na-	38.00	59.75	67.00 2,819.50							
	0	0.00	12	6,396.00	6,396.00	45.00	233.75	-na-	38.00	59.75	67.00 6,839.50							
	1	198.00	11	5,863.00	6,061.00	45.00	233.75	-na-	38.00	59.75	67.00 6,504.50							
	2	396.00	10	5,330.00	5,726.00	45.00	233.75	-na-	38.00	59.75	67.00 6,169.50							
	3	594.00	9	4,797.00	5,391.00	45.00	233.75	-na-	38.00	59.75	67.00 5,834.50							
	4	792.00	8	4,264.00	5,056.00	45.00	233.75	-na-	38.00	59.75	67.00 5,499.50							
	5	990.00	7	3,731.00	4,721.00	45.00	233.75	-na-	38.00	59.75	67.00 5,164.50							
	6	1,188.00	6	3,198.00	4,386.00	45.00	233.75	-na-	38.00	59.75	67.00 4,829.50							
	7	1,386.00	5	2,665.00	4,051.00	45.00	233.75	-na-	38.00	59.75	67.00 4,494.50							
	8	1,584.00	4	2,132.00	3,716.00	45.00	233.75	-na-	38.00	59.75	67.00 4,159.50							
	9	1,782.00	3	1,599.00	3,381.00	45.00	233.75	-na-	38.00	59.75	67.00 3,824.50							
	10	1,980.00	2	1,066.00	3,046.00	45.00	233.75	-na-	38.00	59.75	67.00 3,489.50							
	11	2,178.00	1	533.00	2,711.00	45.00	233.75	-na-	38.00	59.75	67.00 3,154.50							

Notes:

- (1) During the regular academic year, law students on semesters pay 150% of the academic fee.
- (2) A one-time Matriculation fee is assessed on all new and transfer students — \$389 Undergraduate / \$389 Graduate and Law.
- (3) Students enrolled in off-campus programs (OIMB and Portland only) are assessed 50% of the Incidental fee.
- (4) Qualified tuition and fees do not include student health insurance fees for Tax Relief Act reporting.
- (5) Students enrolled in the Portland programs use the Portland State University Student Health Center, and pay the same Health Service Fee as PSU students.
- (6) Students coded as international undergraduates will be assessed a \$200 fee during the regular academic year.

UNIVERSITY of OREGON**2016-17 Academic Year Part-Time, Non-Matriculated Student Tuition and Required Fees - Per Term****Combination Course Level**

Part-Time Students 1 - 8 Credit Hours	Course Level <i>100-499</i>		Course Level <i>500 Plus</i>		Total Tuition	Building Fee	Inci- dental Fee	Health Service Fee	Rec Center Bond	Rec Center Fee	EMU Fee	Total Tuition & Fees
	Credit Hour	Tuition	Credit Hour	Tuition								

Source: UO Office of Institutional Research.

For additional information, please contact J.P. Monroe (jpmorroe@uoregon.edu) at 541-346-2085.

UNIVERSITY of OREGON

2017 Summer Part-Time, Non-Matriculated Student Tuition and Required Fees

Combination Course Level

Part-Time Students 1 - 8 Credit Hours	Course Level 100-499		Course Level 500 Plus		Total Tuition	Building Fee	Inci- dental Fee	Health Service Fee	Rec Center Bond	Rec Center Fee	EMU Fee	Total Tuition & Fees
	Credit Hour	Tuition	Credit Hour	Tuition								
1	1	226.00	0	0.00	226.00	34.00	58.00	-na-	38.00	59.75	67.00	482.75
	0	0.00	1	383.00	383.00	34.00	58.00	-na-	38.00	59.75	67.00	639.75
2	2	389.00	0	0.00	389.00	34.00	58.00	-na-	38.00	59.75	67.00	645.75
	0	0.00	2	694.00	694.00	34.00	58.00	-na-	38.00	59.75	67.00	950.75
	1	226.00	1	383.00	609.00	34.00	58.00	-na-	38.00	59.75	67.00	865.75
3	3	552.00	0	0.00	552.00	34.00	58.00	-na-	38.00	59.75	67.00	808.75
	0	0.00	3	1,005.00	1,005.00	34.00	58.00	-na-	38.00	59.75	67.00	1,261.75
	1	226.00	2	694.00	920.00	34.00	58.00	-na-	38.00	59.75	67.00	1,176.75
	2	389.00	1	383.00	772.00	34.00	58.00	-na-	38.00	59.75	67.00	1,028.75
4	4	715.00	0	0.00	715.00	34.00	58.00	-na-	38.00	59.75	67.00	971.75
	0	0.00	4	1,316.00	1,316.00	34.00	58.00	-na-	38.00	59.75	67.00	1,572.75
	1	226.00	3	1,005.00	1,231.00	34.00	58.00	-na-	38.00	59.75	67.00	1,487.75
	2	389.00	2	694.00	1,083.00	34.00	58.00	-na-	38.00	59.75	67.00	1,339.75
	3	552.00	1	383.00	935.00	34.00	58.00	-na-	38.00	59.75	67.00	1,191.75
5	5	878.00	0	0.00	878.00	34.00	58.00	-na-	38.00	59.75	67.00	1,134.75
	0	0.00	5	1,627.00	1,627.00	34.00	58.00	-na-	38.00	59.75	67.00	1,883.75
	1	226.00	4	1,316.00	1,542.00	34.00	58.00	-na-	38.00	59.75	67.00	1,798.75
	2	389.00	3	1,005.00	1,394.00	34.00	58.00	-na-	38.00	59.75	67.00	1,650.75
	3	552.00	2	694.00	1,246.00	34.00	58.00	-na-	38.00	59.75	67.00	1,502.75
	4	715.00	1	383.00	1,098.00	34.00	58.00	-na-	38.00	59.75	67.00	1,354.75
6	6	1,041.00	0	0.00	1,041.00	34.00	58.00	-na-	38.00	59.75	67.00	1,297.75
	0	0.00	6	1,938.00	1,938.00	34.00	58.00	-na-	38.00	59.75	67.00	2,194.75
	1	226.00	5	1,627.00	1,853.00	34.00	58.00	-na-	38.00	59.75	67.00	2,109.75
	2	389.00	4	1,316.00	1,705.00	34.00	58.00	-na-	38.00	59.75	67.00	1,961.75
	3	552.00	3	1,005.00	1,557.00	34.00	58.00	-na-	38.00	59.75	67.00	1,813.75
	4	715.00	2	694.00	1,409.00	34.00	58.00	-na-	38.00	59.75	67.00	1,665.75
	5	878.00	1	383.00	1,261.00	34.00	58.00	-na-	38.00	59.75	67.00	1,517.75
7	7	1,204.00	0	0.00	1,204.00	34.00	58.00	-na-	38.00	59.75	67.00	1,460.75
	0	0.00	7	2,249.00	2,249.00	34.00	58.00	-na-	38.00	59.75	67.00	2,505.75
	1	226.00	6	1,938.00	2,164.00	34.00	58.00	-na-	38.00	59.75	67.00	2,420.75

UNIVERSITY of OREGON

2017 Summer Part-Time, Non-Matriculated Student Tuition and Required Fees

Combination Course Level

Part-Time Students 1 - 8 Credit Hours	Course Level 100-499		Course Level 500 Plus		Total Tuition & Fees							
	Credit Hour	Tuition	Credit Hour	Tuition		Total Tuition	Building Fee	Inci- dental Fee	Health Service Fee	Rec Center Bond	Rec Center Fee	EMU Fee
	2	389.00	5	1,627.00	2,016.00	34.00	58.00	-na-	38.00	59.75	67.00	2,272.75
	3	552.00	4	1,316.00	1,868.00	34.00	58.00	-na-	38.00	59.75	67.00	2,124.75
	4	715.00	3	1,005.00	1,720.00	34.00	58.00	-na-	38.00	59.75	67.00	1,976.75
	5	878.00	2	694.00	1,572.00	34.00	58.00	-na-	38.00	59.75	67.00	1,828.75
	6	1,041.00	1	383.00	1,424.00	34.00	58.00	-na-	38.00	59.75	67.00	1,680.75
8	8	1,367.00	0	0.00	1,367.00	34.00	58.00	-na-	38.00	59.75	67.00	1,623.75
	0	0.00	8	2,560.00	2,560.00	34.00	58.00	-na-	38.00	59.75	67.00	2,816.75
	1	226.00	7	2,249.00	2,475.00	34.00	58.00	-na-	38.00	59.75	67.00	2,731.75
	2	389.00	6	1,938.00	2,327.00	34.00	58.00	-na-	38.00	59.75	67.00	2,583.75
	3	552.00	5	1,627.00	2,179.00	34.00	58.00	-na-	38.00	59.75	67.00	2,435.75
	4	715.00	4	1,316.00	2,031.00	34.00	58.00	-na-	38.00	59.75	67.00	2,287.75
	5	878.00	3	1,005.00	1,883.00	34.00	58.00	-na-	38.00	59.75	67.00	2,139.75
	6	1,041.00	2	694.00	1,735.00	34.00	58.00	-na-	38.00	59.75	67.00	1,991.75
	7	1,204.00	1	383.00	1,587.00	34.00	58.00	-na-	38.00	59.75	67.00	1,843.75
9	9	1,530.00	0	0.00	1,530.00	34.00	58.00	-na-	38.00	59.75	67.00	1,786.75
	0	0.00	9	2,871.00	2,871.00	34.00	58.00	-na-	38.00	59.75	67.00	3,127.75
	1	226.00	8	2,560.00	2,786.00	34.00	58.00	-na-	38.00	59.75	67.00	3,042.75
	2	389.00	7	2,249.00	2,638.00	34.00	58.00	-na-	38.00	59.75	67.00	2,894.75
	3	552.00	6	1,938.00	2,490.00	34.00	58.00	-na-	38.00	59.75	67.00	2,746.75
	4	715.00	5	1,627.00	2,342.00	34.00	58.00	-na-	38.00	59.75	67.00	2,598.75
	5	878.00	4	1,316.00	2,194.00	34.00	58.00	-na-	38.00	59.75	67.00	2,450.75
	6	1,041.00	3	1,005.00	2,046.00	34.00	58.00	-na-	38.00	59.75	67.00	2,302.75
	7	1,204.00	2	694.00	1,898.00	34.00	58.00	-na-	38.00	59.75	67.00	2,154.75
10	8	1,367.00	1	383.00	1,750.00	34.00	58.00	-na-	38.00	59.75	67.00	2,006.75
	10	1,693.00	0	0.00	1,693.00	34.00	58.00	-na-	38.00	59.75	67.00	1,949.75
	0	0.00	10	3,182.00	3,182.00	34.00	58.00	-na-	38.00	59.75	67.00	3,438.75
	1	226.00	9	2,871.00	3,097.00	34.00	58.00	-na-	38.00	59.75	67.00	3,353.75
	2	389.00	8	2,560.00	2,949.00	34.00	58.00	-na-	38.00	59.75	67.00	3,205.75
	3	552.00	7	2,249.00	2,801.00	34.00	58.00	-na-	38.00	59.75	67.00	3,057.75
	4	715.00	6	1,938.00	2,653.00	34.00	58.00	-na-	38.00	59.75	67.00	2,909.75
	5	878.00	5	1,627.00	2,505.00	34.00	58.00	-na-	38.00	59.75	67.00	2,761.75
	6	1,041.00	4	1,316.00	2,357.00	34.00	58.00	-na-	38.00	59.75	67.00	2,613.75
	7	1,204.00	3	1,005.00	2,209.00	34.00	58.00	-na-	38.00	59.75	67.00	2,465.75
	8	1,367.00	2	694.00	2,061.00	34.00	58.00	-na-	38.00	59.75	67.00	2,315.75

UNIVERSITY of OREGON

2017 Summer Part-Time, Non-Matriculated Student Tuition and Required Fees

Combination Course Level

Part-Time Students 1 - 8 Credit Hours	<i>Course Level</i>		<i>Course Level</i>		Incidental Fee	Health Service Fee	Rec Center Bond	Rec Center Fee	EMU Fee	Total Tuition & Fees						
	<i>100-499</i>		<i>500 Plus</i>													
	Credit Hour	Tuition	Credit Hour	Tuition												
	9	1,530.00	1	383.00	1,913.00	34.00	58.00	-na-	38.00	59.75	67.00 2,169.75					
11	11	1,856.00	0	0.00	1,856.00	34.00	58.00	-na-	38.00	59.75	67.00 2,112.75					
	0	0.00	11	3,493.00	3,493.00	34.00	58.00	-na-	38.00	59.75	67.00 3,749.75					
	1	226.00	10	3,182.00	3,408.00	34.00	58.00	-na-	38.00	59.75	67.00 3,664.75					
	2	389.00	9	2,871.00	3,260.00	34.00	58.00	-na-	38.00	59.75	67.00 3,516.75					
	3	552.00	8	2,560.00	3,112.00	34.00	58.00	-na-	38.00	59.75	67.00 3,368.75					
	4	715.00	7	2,249.00	2,964.00	34.00	58.00	-na-	38.00	59.75	67.00 3,220.75					
	5	878.00	6	1,938.00	2,816.00	34.00	58.00	-na-	38.00	59.75	67.00 3,072.75					
	6	1,041.00	5	1,627.00	2,668.00	34.00	58.00	-na-	38.00	59.75	67.00 2,924.75					
	7	1,204.00	4	1,316.00	2,520.00	34.00	58.00	-na-	38.00	59.75	67.00 2,776.75					
	8	1,367.00	3	1,005.00	2,372.00	34.00	58.00	-na-	38.00	59.75	67.00 2,628.75					
12	9	1,530.00	2	694.00	2,224.00	34.00	58.00	-na-	38.00	59.75	67.00 2,480.75					
	10	1,693.00	1	383.00	2,076.00	34.00	58.00	-na-	38.00	59.75	67.00 2,332.75					
	12	2,019.00	0	0.00	2,019.00	34.00	58.00	-na-	38.00	59.75	67.00 2,275.75					
	0	0.00	12	3,804.00	3,804.00	34.00	58.00	-na-	38.00	59.75	67.00 4,060.75					
	1	226.00	11	3,493.00	3,719.00	34.00	58.00	-na-	38.00	59.75	67.00 3,975.75					
	2	389.00	10	3,182.00	3,571.00	34.00	58.00	-na-	38.00	59.75	67.00 3,827.75					
	3	552.00	9	2,871.00	3,423.00	34.00	58.00	-na-	38.00	59.75	67.00 3,679.75					
	4	715.00	8	2,560.00	3,275.00	34.00	58.00	-na-	38.00	59.75	67.00 3,531.75					
	5	878.00	7	2,249.00	3,127.00	34.00	58.00	-na-	38.00	59.75	67.00 3,383.75					
	6	1,041.00	6	1,938.00	2,979.00	34.00	58.00	-na-	38.00	59.75	67.00 3,235.75					
	7	1,204.00	5	1,627.00	2,831.00	34.00	58.00	-na-	38.00	59.75	67.00 3,087.75					
	8	1,367.00	4	1,316.00	2,683.00	34.00	58.00	-na-	38.00	59.75	67.00 2,939.75					
	9	1,530.00	3	1,005.00	2,535.00	34.00	58.00	-na-	38.00	59.75	67.00 2,791.75					
	10	1,693.00	2	694.00	2,387.00	34.00	58.00	-na-	38.00	59.75	67.00 2,643.75					
	11	1,856.00	1	383.00	2,239.00	34.00	58.00	-na-	38.00	59.75	67.00 2,495.75					

Notes:

- (1) During the regular academic year, law students on semesters pay 150% of the academic fee.
- (2) A one-time Matriculation fee is assessed on all new and transfer students — \$389 Undergraduate / \$389 Graduate and Law.
- (3) Students enrolled in off-campus programs (OIMB and Portland only) are assessed 50% of the Incidental fee.
- (4) Qualified tuition and fees do not include student health insurance fees for Tax Relief Act reporting.
- (5) Students enrolled in the Portland programs use the Portland State University Student Health Center, and pay the same Health Service Fee as PSU students.
- (6) Students coded as international undergraduates will be assessed a \$150 fee during the summer term.

UNIVERSITY of OREGON**2017 Summer Part-Time, Non-Matriculated Student Tuition and Required Fees****Combination Course Level**

Part-Time Students 1 - 8 Credit Hours	Course Level <i>100-499</i>		Course Level <i>500 Plus</i>		Total Tuition	Building Fee	Inci- dental Fee	Health Service Fee	Rec Center Bond	Rec Center Fee	EMU Fee	Total Tuition & Fees
	Credit Hour	Tuition	Credit Hour	Tuition								

Source: UO Office of Institutional Research.

For additional information, please contact J.P. Monroe (jmonroe@uoregon.edu) at 541-346-2085.



BOARD OF TRUSTEES OF THE UNIVERSITY OF OREGON

**POLICIES ON TUITION, MANDATORY
ENROLLMENT FEES AND OTHER CHARGES,
FINES, AND FEES**

PROPOSED

2016-17 ACADEMIC YEAR
2017 SUMMER SESSION

For approval by the Board of Trustees of the University of Oregon

Contents

Authority.....	4
Board of Trustees of the University of Oregon.....	4
Tuition and Fee Policies for 2016-17.....	4
Tuition	4
Fees	6
Mandatory Enrollment Fees	6
Student Residency	6
All Other Fees.....	7
Post-baccalaureate, Non-graduate Student Classification	8
Scholarship and Tuition Remission Policies	9
Student Financial Aid Programs	9
Diversity Programs	9
International Recruitment Programs.....	10
International Exchanges.....	10
Contract and Grant	10
University of Oregon Tuition Grant.....	11
Veteran Fee Remissions.....	11
VOYAGER Fee Remission.....	11
Veterans' Dependent Tuition Waiver	11
Nonresident Veteran Resident Tuition	13
Foster Youth Tuition Waiver	14
Tuition Equity.....	16
Other Financial Aid Programs	17
Reduced Tuition Benefit for Academic and Classified Employees.....	17
Reduced Tuition Benefit for Family Members and Domestic Partners of Employees	21
Graduate Assistants	24
Resident Oregon Senior Citizen Program	24
Auditors.....	24

University/School Partnership Co-Pay Program	24
Other Remission Programs	26
Fee Policies Specific to Summer Session.....	26
Refunds, Waivers, and Accounts Receivable Policies	27
Refund Policies.....	27
Military Duty Refund Policy	27
Waiver of Certain Student Fees	27
Institution Authority to Adjust Charges.....	28
Revolving Charge Agreement	28
Interest on Overdue Accounts	28

AUTHORITY

Board of Trustees of the University of Oregon

Under ORS 352.102, the Board of Trustees (Trustees or Board) may authorize, establish, eliminate, collect, manage, use in any manner and expend all revenue derived from tuition and mandatory enrollment fees.

In determining tuition and mandatory enrollment fees for undergraduate students who are enrolled in a degree program and are qualified to pay resident tuition, the Trustees may not increase the total of tuition and mandatory enrollment fees by more than five percent annually unless the Board first receives approval from the Higher Education Coordinating Commission or the Legislative Assembly.

Under ORS 352.105, the Board will also collect mandatory Incidental Fees upon the request of the ASUO under a process established by the ASUO in consultation with the Trustees. Mandatory Incidental Fees collected by the Board will be allocated by the recognized student government. The mandatory Incidental Fee proposed by the ASUO, uses of the fee or decision to modify an existing fee may be refused by the Board of Trustees or the universityUniversity President if one determines that:

- The recognized student government assessed or allocated the mandatory incidental fees in violation of applicable local, state or federal law;
- The allocation conflicts with a preexisting contractual financial commitment;
- The total mandatory incidental fees budget is an increase of more than five percent over the level of the previous year; or
- The fee request is not advantageous to the cultural or physical development of students.

Under ORS 352.107(1)(d), the Board may establish, collect and use charges, fines and fees for services, facilities, operations and programs. This provision does not cover tuition and mandatory enrollment fees or incidental fees, but it covers every other charge, fine or fee that could be established.

TUITION AND FEE POLICIES FOR 2016-17

Tuition

Tuition for students enrolled in a program is established based on state-appropriated funds per full-time equivalent student, the financial needs of the University, market comparators, student classification (including, but not limited to, undergraduate, graduate and doctoral), residency, credit hours taken, degree program, and other factors. In determining tuition for undergraduate students who are enrolled in a degree program and are qualified to pay resident tuition:

- (1) The Board of Trustees 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.
- (2) The Board of Trustees 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.

The Board of Trustees may not delegate authority to determine tuition for undergraduate students who are enrolled in a degree program and are qualified to pay resident tuition. Revenues derived from tuition may be managed and used in any manner.

~~Non-admitted, 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 during summer. During the regular academic year, tuition and fees are assessed based on the student's classification level, regardless of course level. Non-admitted, 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.~~

Tuition may be established for any University program and may vary by regular academic year, summer session, continuing education programs, and other programs.

- **Academic Year:** Charges assessed to students during the academic year are comprised of tuition, mandatory enrollment fees, and all other student fees. ~~During the regular academic year, tuition and fees are assessed based on the student's classification level, regardless of course level. During the summer, non-admitted, 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~~
- **Summer Session:** For summer session programs, tuition is typically assessed on a per-credit hour basis or aligned to the preceding academic year's structure. The University may choose to make a residency determination for summer term. Tuition rates in the summer session may differ from the academic year. ~~During the summer, non-admitted, 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.~~
- **Continuing Education:** Generally, rates are set no lower than necessary to cover direct plus indirect costs.

Fees

Mandatory Enrollment Fees

A fee is a mandatory enrollment fee if it is required to be paid as a condition of enrollment in the University by every enrolled student. In determining mandatory enrollment fees for undergraduate students who are enrolled in a degree program and are qualified to pay resident tuition:

- (1) The Board of Trustees 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.
- (2) The Board of Trustees 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.

The Board of Trustees may not delegate authority to determine mandatory enrollment fees for undergraduate students who are enrolled in a degree program and are qualified to pay resident tuition. For Academic Year 2016-17, mandatory enrollment fees are the Building, Health Service, Incidental, Recreation Center and Student Union Fees. The University has the option of assessing mandatory enrollment fees during the summer session at rates comparable to those assessed in the academic year.

1. ***Building Fee:*** The Building Fee is used to fund the construction and provide debt service for capital projects, primarily those associated with student centers, health centers, and recreational facilities.
- ***Incidental Fee:*** Incidental Fee recommendations for Academic Year 2016-17 were approved by student committees and forwarded to the President of the University for endorsement in accordance with [UO Policy 580.010.0080-90OAR 580-010-0090](#). Students enrolled in off-campus programs (OIMB and Portland only) are assessed 50% of the Incidental fee.
- ***Health Services Fee:*** The Health Service Fee is used to support student health and counseling services. Students enrolled in the [UO](#) Portland programs use the Portland State University Student Health Center, and pay the same Health Service Fee as PSU students.
- ***Recreation Center Fees; Student Union Fee:*** The Recreation Center Fee and the Student Union Fee are used to fund the construction, debt service, maintenance, and operation costs of the student centers.

Student Residency

A resident student is one who fulfills requirements established by the Inter-Institutional Residency Compact between and among the seven public universities in Oregon. [Graduate students who have a teaching, research, or administrative Graduate Teaching Fellowship or ,are supported by an eligible training grant or graduate fellowship, or have a Teaching Grant are converted to resident status for tuition and fee purposes.](#) [Graduate students who have a Graduate Teaching Fellowship, Research Assistantship, Administrative Assistantship, are supported by an eligible training grant or graduate fellowship, or have a Teaching Grant are converted to resident status for enrollment fee purposes.](#)

All Other Fees

Other fees include all charges, fines and fees that are neither tuition nor mandatory enrollment fees. The Board of Trustees, the President, or designee may establish these fees and use them for services, facilities, operations, and programs.

- ***The Matriculation Fee:*** The Matriculation Fee is a one-time fee charged to newly admitted students upon enrollment. This fee is a one-time assessment and was developed to reduce the large number of enrollment-related fees for [student orientation](#), course scheduling (drop/add fees), transcripts, degree applications, and re-enrollment. The fees are also used to support academic programming for freshman interest groups and learning communities. [The University does not charge students for placement exams for regular academic courses.](#)
- ***Undergraduate International Student Fee:*** The University sets the international student services fee to provide a set of services and programming to support international students. The fee supports services related to academic support; enrollment services; increased immigration compliance and reporting as required by the federal government (such as SEVIS II); personal and cultural counseling and advising; and accelerated planning and delivery of new programs.
- ***Laboratory and Course Fees:*** Laboratory and course fees must be published. Generally, laboratory and course fees are limited to fees for 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 a private source.
- ***Other Charges, Fees and Fines for Services, Facilities, Operations and Programs:*** The level of charges, fines and fees should be at least sufficient to ensure recovery associated direct and indirect costs. Some charges, fines and fees may be established at a level to deter conduct that is contrary to University policies and standards or applicable law. Charges, fees and fines are for purposes such as the following: auxiliary services such as housing, food services, and parking; use of facilities; athletics and other tickets and events; and violation of policies and standards, such as late fines for library books and parking fines.
- ***Application Fee:*** The President or designee determines application fees. The University may assess greater application fees for admission to selected programs or schools. The relevant application fee must be received before the application will be evaluated. Application fees are not refundable.

Undergraduate Application Fee Waiver Program: The President or designee may, upon request, waive the application fee for first-time freshmen or transfer students who, at the time of application, demonstrate high financial need, as evidenced by:

- Participation in a free or reduced school lunch program;
- Pell-eligible status provided on FAFSA-related documents;
- Involvement in TRIO-type college preparatory programs (e.g., Upward Bound, Talent Search, EOC, HEP);
- State of Oregon or U.S. public assistance; College Board fee waiver; or
- Submission of a College Board, NACAC, or Foster Youth Tuition and Fee waiver; or
- Other factors illustrating financial hardship, at the discretion of the Office of Admissions.

No applicant will be granted a fee waiver unless they are determined to have genuine financial need. Prospective students who are classified as international applicants are not eligible for an application fee waiver. However, undocumented Oregon high school students who are potentially eligible for the state's Tuition Equity Program can be granted a waiver on a case-by-case basis. The Office of Admissions administers the application fee waiver program, and its Director may add, remove or modify methods of confirmation as needed over time.

To request an application for Application Fee waiver, go to:
<http://admissions.uoregon.edu/counselors/feedeferral>.

The student must complete the form and, as appropriate, obtain needed signatures to confirm her/his status.

Graduate Application Fee Waiver: A limited number of waivers of the graduate application fee are available for graduate applicants who are:

- An admitted graduate student or an applicant that has already paid the UO graduate admission application fee for the same academic year;
- An employee eligible for staff tuition rates;
- A participant in an undergraduate research program for minority students;
- A participant in a service-based organization such as the Peace Corps ~~or the US armed services~~;
- Active member, reservist or veteran of the U.S. armed services;
- Eligible for a waiver on the basis of financial need.

The Graduate School administers the graduate application fee waiver program. Applicants may request a waiver as part of the online application for Graduate School admission.

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 credit toward a graduate degree is called a *post baccalaureate, non-graduate student* and is assessed tuition at undergraduate rates. Baccalaureate degree holders who are not admitted to post baccalaureate, non-graduate status will be assessed graduate tuition rates.

Baccalaureate degree holders who are admitted to post baccalaureate, non-graduate status are ineligible for graduate credits taken while in this status. However, in individual cases, the University may allow the reservation of credits toward the University's graduate programs. Graduate credits reserved in combination as an undergraduate and post baccalaureate, non-graduate may not exceed 15 credits.

Students who are admitted to an advanced degree program may convert to post baccalaureate, non-graduate student status ~~only upon approval of the Provost or designee with voluntary relinquishment of graduate status upon approval of the Graduate School~~, but only if the student has not been disqualified from the advanced degree program for academic or conduct reasons, ~~or a request is approved by the dean of the Graduate School for voluntary relinquishment of graduate status~~.

Students who are admitted to a graduate 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 apply~~.

SCHOLARSHIP AND TUITION REMISSION POLICIES

The University's commitment to the 40-40-20 goal described in ORS.009 is achieved through an array of scholarship and financial aid programs and policies. These programs and policies promote the ~~university~~University's goals of providing accessibility to high-quality higher education.

Student Financial Aid Programs

The combined aid for a student may not exceed the cost of attendance for that student, except as approved by the President or designee. The ~~u~~University's student financial aid offerings are comprised of programs similar to others offered across the country (often referred to as "fee waivers" or "tuition discounts") enhanced by initiatives specific to the University or the state of Oregon. As an enrollment management tool, programmatic student aid allows the University 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 University student financial aid programs:

Diversity Programs

- **University of Oregon Diversity Initiatives**
 - *Criteria:* These initiatives are open to all admitted students, resident or nonresident, undergraduate, graduate, or law. The programs may consider different factors in making awards and may offer financial aid programs that support the ~~university~~University's commitment to diversity and supports its educational mission.

- *Awards:* The University may make partial or full scholarships based on need or to expand the number of students who receive at least some funding support. Awards are specific to the University of Oregon, and students may not take a scholarship with them if they move to another institution.

International Recruitment Programs

- **International Fee Remission Program**
 - *Criteria:* This program is for admitted undergraduate or graduate students with international student status.
 - *Awards:* Awards may vary in amount but cannot exceed the total amount of the fee. The University has the option to remit all or a portion of this fee.
- **Cultural Service Program**
 - *Criteria:* This program is for admitted undergraduate or graduate students with international 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 but cannot exceed the total nonresident undergraduate or graduate tuition and mandatory enrollment fees. Remission of mandatory enrollment fees is at the universityUniversity's option.

International Exchanges

- **IE3 Global Programs**
 - *Criteria:* This program is for students who are attending University of Oregon as a part of an exchange program managed by IE3 Global and approved by the University of Oregon.
 - *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

- **Contract and Grant: Academic Year**
 - *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.
- **Contract and Grant: Summer Session**
 - *Criteria:* This provision is for students who participate in specific courses or programs during the summer session 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.

University of Oregon Tuition Grant

- *Criteria:* The University of Oregon Tuition Grant is a need-based tuition grant program available to qualified Oregon resident undergraduates.
- *Awards:* These supplemental tuition grants may not exceed the total Tuition assessed for the regular academic year.

Veteran Fee Remissions

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 9/11.

- *Criteria:* The VOYAGER fee remissions are 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 Aid 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 or the VA Chapter 33 Tuition Fee benefit 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 University of Oregon catalog. Students are not eligible for the award once they earn fifteen credits above the minimum number of credits required by the degree.

Veterans' Dependent Tuition Waiver

- *Criteria:* The Veterans' Dependent tuition waiver is for qualified students admitted to a baccalaureate or master's degree program. A qualified student is a child (includes adopted child or stepchild), spouse or an ~~unremarried~~-surviving spouse who has not remarried 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% service-connected disability rating as certified by the United States Department of Veterans Affairs or by any branch of the Armed Forces of the United States; 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:
 - Applied for and received a waiver for a baccalaureate degree when the child was 23 years of age or younger; and
 - Applied for a master's program waiver within 12 months of receiving a baccalaureate degree.

The qualifying student must meet Oregon residency requirements.

- *Awards:* The award may be granted for credit hours for courses that are offered at the University of Oregon. The award does not cover other mandatory enrollment and course specific fees. The maximum waiver granted under this remission program shall be:
 - The total number of attempted credit hours equal to four years of full-time attendance for a baccalaureate degree; and
 - 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.
 1. 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.

2. 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.
3. Awards to children of Purple Heart recipients apply only to students admitted as new but not continuing for Fall 2013 or thereafter.
4. Please, visit the University of Oregon webpage at <http://brp.uoregon.edu/special-fees-fines-book> for additional program information and application process.

Nonresident Veteran Resident Tuition

The Nonresident Veteran Resident Tuition is a tuition reduction for qualified students who are not Oregon residents and who are attending classes as an admitted undergraduate or graduate student at the university if the student:

- Served in the Armed Forces of the United States;
 - 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
 - Provides proof that the student has established a physical presence in Oregon within 12 months of being enrolled at the University of Oregon.
- *Award:* Qualified 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:
- A student who served in the Armed Forces of the United States *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 the ~~university~~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 University of Oregon.

Qualified graduate 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:

- A student who served in the Armed Forces of the United States *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 the ~~university~~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 University of Oregon.

Foster Youth Tuition Waiver

The Foster Youth Tuition and Fee Waiver originated with the passage of HB 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 within the ~~university~~University 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:
 - 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
 - Be admitted to an undergraduate degree program and enroll prior to reaching 25 years of age; and
 - Submit a completed FAFSA (Free Application for Federal Student Aid) for each academic year he/she is eligible for the program; and
 - 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:
 - a. Tuition for academic credit courses (at base or differential rates depending upon program to which student is admitted) but not for noncredit courses.
 - b. Mandatory enrollment fees: building, incidental, health service, recreation center, or other mandatory fees that may be added from time to time.
 - c. Fees required for instruction related services such as lab or course fees that are assessed upon registration for a particular course.
 - d. The waiver excludes all other charges, fees and fines for 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:
 - a. Any federal Pell or Supplemental Educational Opportunity Grants (SEOG)
 - b. Oregon Opportunity Grant established under ORS 384.205
 - c. 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 universityUniversity, 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 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
- 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 4 years of undergraduate education” and “equivalent of 4 academic years” is defined as up to 12 terms of full time study or the equivalent. Attendance at less than full-time will be prorated, accordingly.

Please, visit the University of Oregon webpage at <http://brp.uoregon.edu/special-fees-fines-book> for additional program information and application process.

Tuition Equity

The 2013 Oregon Legislature passed the OUS-supported 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 an Oregon public university, 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;
 - e. 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
 - f. 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 an Oregon public university, received a high school diploma from a secondary school in this state or received the equivalent of a high school diploma.
3. 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:
 - a. 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
 - b. 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.

Please, visit the University of Oregon webpage at <http://brp.uoregon.edu/special-fees-fines-book> for additional program information and application process.

Other Financial Aid Programs

The ~~university~~University may create other individual financial aid programs to address enrollment management and financial aid program needs.

- *Criteria:* The University of Oregon scholarship programs are merit and/or need based awards that support the mission and goals of the ~~university~~University. These scholarships assist in the recruitment and retention of students.
- *Awards:* Scholarship amounts and eligibility criteria may vary across programs, and across academic years. These programs will be reviewed periodically to ensure that they continue to support the ~~university~~University's enrollment goals. Both resident and nonresident undergraduates will be eligible to receive funds under this program, with award amounts differing due to the difference in tuition for these groups of students. For programs where need is a consideration, use of the FAFSA data will also be considered in determining award eligibility.

Reduced Tuition Benefit for Academic and Classified Employees

Reduced Tuition Benefit for Employees

This benefit is also known as the “staff fee” privilege.

Rates: The rate for employees is 30% of resident undergraduate tuition assessed at the teaching institution, rounded to the nearest dollar. The staff fee rate will be charged at the “regular” (not differential) resident undergraduate tuition rate for employees enrolled in either undergraduate or graduate programs, up to twelve credits per term.

Fees: Charges for mandatory enrollment fees do not apply for employees using the benefit; nor are employees entitled to health services or incidental fee services through this program. No Application Fee is required for employees and no 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.

Employee Eligibility: On approval of the president or designee and with the concurrence of the employee's immediate supervisor, employees appointed at half-time (.5 FTE) or more are eligible. To qualify for this fee, the employee must meet these eligibility criteria no later than the first day of classes of the term of enrollment.

For purposes of this benefit, 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.

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.

Employees on furlough or lay-off status may be eligible for staff fees in accordance with provisions of a collective bargaining agreement.

The staff fee is not available to temporary classified employees or student employees, including graduate assistants.

Institutional Eligibility: The benefit may be used at any Oregon four-year public institution. 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.

Excluded UO Programs: Staff fees are not applicable to self-support courses or to courses in excluded UO programs. Excluded programs are determined at the discretion of the President and the notice of exclusion must be filed with Human Resources office prior to the first day of registration for a term.

2016-17 excluded programs are:

1. Self-support courses
2. Law Program
3. Law — Conflict and Dispute Resolution (CRES)
4. Law — Environmental and Natural Resources
5. Journalism Portland Program — Strategic Communication Masters

6. Journalism Portland Program — Multimedia Journalism
7. Oregon Executive MBA
8. Applied Information Management (AIM)
9. Clark Honors College – Differential Tuition Only

12-Credit Limit and Tuition Plateaus: The maximum number of credits to which the staff fee may be applied is 12 credits per quarter or per semester. See exception for retired employees and employees on leave, Section (d) of OAR580-022-0030. For more information please go to:

<http://brp.uoregon.edu/special-fees-fines-book>. Employees enrolled for more than 12 credits in one term will pay for each additional credit at the campus published “each additional credit” tuition rate applicable to resident undergraduate or graduate students, depending upon the degree status of the employee (or family member in the case of the Reduced Tuition Benefit for Family Members and Domestic Partners of Employees). Under this benefit, there is no tuition plateau for employees using the staff fee for graduate courses; there is no fee plateau at any campus for employees, family and dependents, or retired staff.

Auditing: 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. The University of Oregon maintains a record of the courses audited. Courses approved for audit by the instructor confer no credit to the student, are not charged the staff fee rate or regular tuition, and may be used in addition to courses taken using the staff fee privilege 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 Reduced Tuition Benefit for Family Members and Domestic Partners of Employees.

The academic term rate for employees is 30% of resident undergraduate tuition assessed at the teaching institution, rounded to the nearest dollar. The staff fee rate will be charged at the “regular” (not differential) resident undergraduate tuition rate for employees enrolled in either undergraduate or graduate programs, up to twelve credits per term.

~~Charges for mandatory enrollment fees do not apply for employees using the benefit; nor are employees entitled to health services or incidental fee services through this program. No Application Fee is required for employees and no 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 self support courses or to courses in excluded UO programs. 2016-17 excluded programs are:~~

- ~~1. Self support courses~~
- ~~2. Law Program~~
- ~~3. Law — Appropriate Dispute Resolution (CRS)~~
- ~~4. Law — Environmental and Natural Resources~~
- ~~5. Journalism Portland Program — Strategic Communication Masters~~
- ~~6. Journalism Portland Program — Multimedia Journalism~~
- ~~7. Oregon Executive MBA~~
- ~~8. Applied Information Management (AIM)~~
- ~~9. Clark Honors College — Differential Tuition Only~~

~~Excluded programs are determined at the discretion of the President and the notice of exclusion must be filed with Human Resources 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. See exception for retired employees and employees on leave, Section (d) of OAR580-022-0030. For more information please go to: <http://brp.uoregon.edu/special-fees-fines-book>.~~
- ~~3. Employees enrolled for more than 12 credits in one term will pay for each additional credit at the campus published "each additional credit" tuition rate applicable to resident undergraduate or graduate students, depending upon the employee's or dependent's degree status. There is no tuition plateau for graduate students using the staff tuition benefit.~~
- ~~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 on furlough or lay-off status may be eligible for staff fees in accordance with provisions of a collective bargaining agreement.~~
- ~~8. 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. The University of Oregon maintains 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.~~
- ~~9. The benefit may be used at any Oregon four-year public institution.~~
- ~~10. Effective July 1, 2014, University of Oregon unclassified employees who are using this tuition discount for the undergraduate education of a dependent child will be entitled to a second, concurrent tuition discount for a dependent child to attend undergraduate programs at the University of Oregon. The terms, conditions, eligibility requirements, and discount available applicable to this additional tuition discount will be the same as the terms, conditions, eligibility requirements and discount available under the tuition discount program.~~

Reduced Tuition Benefit for Family Members of Employees

To improve the recruitment and retention of high quality faculty and staff, the staff fee privilege may be transferred to a qualified family member such as a spouse, domestic partner or dependent child, on a limited basis. Only one (two, if the staff member is unclassified) 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 single term.

To qualify for this benefit, both the family member and employee must meet the eligibility criteria below no later than two weeks prior to the first day of classes of the term of enrollment.

Rates: The rate for family members is 30% of resident undergraduate tuition assessed at the teaching institution, rounded to the nearest dollar. The staff fee rate will be charged at the “regular” (not differential) resident undergraduate tuition rate for family members enrolled in either undergraduate or graduate programs, up to twelve credits per term.

Fees: The family member to whom the benefit is transferred is responsible for all mandatory enrollment fees in addition to 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.

Employee Eligibility: The staff fee privilege may be transferred to a qualified family member of an employee 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 Information System records. The transfer of staff fee benefits is not available for retired employees. Eligibility of employees on furlough or lay-off status is subject to applicable collective bargaining agreements.

Family Member Eligibility: Qualified family members include the eligible employee’s 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.

Second Family Member Eligibility: Unclassified employees who meet the eligibility criteria and who are using the staff fee for the undergraduate education of a dependent child are entitled to a second, concurrent staff fee privilege for another dependent child to attend undergraduate programs only at the University of Oregon. The terms and conditions (i.e., rates, fees, eligibility requirements, credit limits, and excluded programs) are the same as under the Tuition Benefit for Employees and for Family Members.

Institutional Eligibility: The benefit may be used at any Oregon four-year public institution. Family members who use the staff fee for courses away from the employee’s home institution are subject to staff fee policies and procedures of the instructing institution.

Excluded UO Programs: See “Reduced Tuition Benefit for Employees” above.

12-Credit Limit and Tuition Plateaus: The maximum number of credits to which the staff fee may be applied is 12 credits per quarter or per semester. The family member enrolled for more than 12 credits in one term will pay for each additional credit at the campus published "each additional credit" tuition rate applicable to resident undergraduate or graduate students, depending upon the family member's student classification. There is no tuition plateau for a family member using the staff fee for graduate courses.

Auditing: No tuition shall be assessed to courses enrolled in by the Family Member 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 Reduced Tuition Benefit for Employees.

Reduced Tuition Benefit for Family Members and Domestic Partners of Employees

~~To improve the recruitment and retention of high quality faculty and staff, the staff fee policy is extended to qualified family members, eligible dependents, 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 a 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 in addition to 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 self support courses or to courses in excluded UO programs. 2016-17 excluded programs are:~~

- ~~1. Self support courses~~
- ~~2. Law Program~~
- ~~3. Law — Appropriate Dispute Resolution (CRES)~~
- ~~4. Law — Environmental and Natural Resources~~
- ~~5. Journalism Portland Program — Strategic Communication Masters~~
- ~~6. Journalism Portland Program — Multimedia Journalism~~
- ~~7. Oregon Executive MBA~~
- ~~8. Applied Information Management (AIM)~~
- ~~9. Clark Honors College — Differential Tuition Only~~

~~Excluded programs are determined at the discretion of the President and the notice of exclusion must be filed with Human Resources 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.~~
- ~~3. 3) The maximum number of transferrable credits is 12 credits per quarter or per semester per student. Only one (two, if the staff member is unclassified) 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 will pay for each additional credit at the campus published "each additional credit" tuition rate applicable to resident undergraduate or graduate students, depending upon the employee's or dependent's degree status. There is no tuition plateau for graduate students using the staff tuition benefit. The Presidents of each university may exclude certain programs from the policy.~~
- ~~5. The transfer of staff fee benefits is not available for retired employees.~~
- ~~6. 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.~~
- ~~7. Eligibility of employees on furlough or lay off status is subject to applicable collective bargaining agreements.~~
- ~~8. 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.~~
- ~~9. The benefit may be used at any Oregon four-year public institution.~~
- ~~10. Effective July 1, 2014, University of Oregon unclassified employees who are using this tuition discount for the undergraduate education of a dependent child will be entitled to a second, concurrent tuition discount for a dependent child to attend undergraduate programs at the University of Oregon. The terms, conditions, eligibility requirements, and discount available applicable to this additional tuition discount will be the same as the terms, conditions, eligibility requirements and discount available under the tuition discount program.~~

Graduate Assistants

Graduate students appointed by the University of Oregon as Graduate Teaching Fellows (GTFs), including as graduate teaching assistants and graduate research assistants, are paid at established institutional salary rates and are exempt from the payment of tuition at the University of Oregon up to the first 16 credits per term subject to institutional policy. Appointment as a GTF may not be for less than .20 FTE for the term of appointment.

The tuition will be assessed to the employing account or department within the ~~university~~University, not to exceed the graduate resident, full-time student tuition per term. When a GTF is authorized to exceed 16 credits per term, the ~~university~~University shall charge the GTF the resident overload tuition for the excess credits that correspond to their major's tuition schedule. GTFs are exempt from payment of tuition and of fees for self-support courses that are required for the completion of the degree for up to 16 credit hours taken in any quarter to which the appointment applies.

GTFs are assessed mandatory enrollment fees, a portion of which is subsidized by the institution during fall, winter, and spring.

Students with academic-year GTF appointments may be eligible for a summer tuition waiver if they meet the criteria outlined on the Graduate School website.

Resident Oregon Senior Citizen Program

The Senior Citizen Program is designed for Oregon resident senior citizens, age 65 or older. Seniors may register to attend class as an auditor at no charge on a space-available basis, and with the permission of the offering department. Classes taken under this program do not offer credit and cannot be counted toward a degree. If credit is sought, tuition and fees, as well as 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.

Auditors

[A student enrolled in a combination of for-credit and audit courses will be assessed for the total hours under the tuition and fee schedule, inclusive of for-credit and audited courses, 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.](#)

[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 the ~~university~~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, a district earns a co-pay privilege to register any licensed educational professional employed by the district at the universityUniversity 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.

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.

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

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.

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.

A co-pay privilege may be used during any academic term (including summer session) at the universityUniversity to the extent that it has a teacher preparation program. The universityUniversity

may enter into “partnerships of trade” with any sister institution if they are willing to accept vouchers from other institutions.

The universityUniversity 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.

The co-pay privilege may also be redeemed by an administrator, counselor, or other licensed educator professional in a cooperating district.

Other Provisions

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.

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

The universityUniversity may create individual fee remission programs to address enrollment management and financial aid program needs.

- *Awards:* Awards may vary in amount but cannot exceed the total cost of education.

FEE POLICIES SPECIFIC TO SUMMER SESSION

Tuition rates may be assessed based on undergraduate and graduate course designation or student classification.

Course level designations are generally defined as follows:

- Course numbers assigned 499 and below are assigned undergraduate fee-tuition rates.
- Course numbers assigned 500 and higher are assigned graduate fee-tuition rates.

Semester rates for students attending the University of Oregon Law programs are modified for the Summer Session program.

Tuition may be assessed on a per-credit hour basis or aligned to the preceding academic year structure. Mandatory enrollment fees are assessed in the summer. The tuition reduction program for employees and Staff, qualifying family/dependents, and the graduate assistant fee privileges may be authorized during the Summer Session at the option of the University. WhenIf authorized, fees and study privilegesthese benefits shall conform to policies set forth in this Fee Book. Staff membersEmployees 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.

~~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.~~

The summer refund policy for course load reduction or withdrawal differs from the academic year policy; the policy can be found at
<http://brp.uoregon.edu/sites/brp/files/brp/fees/Fee%20Refund%20Schedule.pdf>.

REFUNDS, WAIVERS, AND ACCOUNTS RECEIVABLE POLICIES

Refund Policies

Refund policies for course load reduction or withdrawal are subject to universityUniversity policy and procedure. Refunds may be granted to students in accordance with the refund schedule at
<http://brp.uoregon.edu/sites/brp/files/brp/fees/Fee%20Refund%20Schedule.pdf>.

Military Duty Refund Policy

Any student service member or National Guard member 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, the instructor may either- grant credit for the course work completed and assign a grade or arrange for the student to take an incomplete. In either of these cases, no refund will be given. The student may use a combination of these options.

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 the University of Oregon's Office of Business Affairs to determine which fee charges are eligible, if any, for this waiver.

Institution Authority to Adjust Charges

The President or designee 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.

Revolving Charge Agreement

The University of Oregon has adopted a policy establishing a Revolving Charge Agreement. Transactions covered by the Plan may include (by way of description and not limitation) tuition, fees, housing charges and other obligations primarily involving students, including and fines and penalties, incurred by anyone.

The policy shall:

- 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;
- Provide for an agreement to be signed by the obligor

Interest on Overdue Accounts

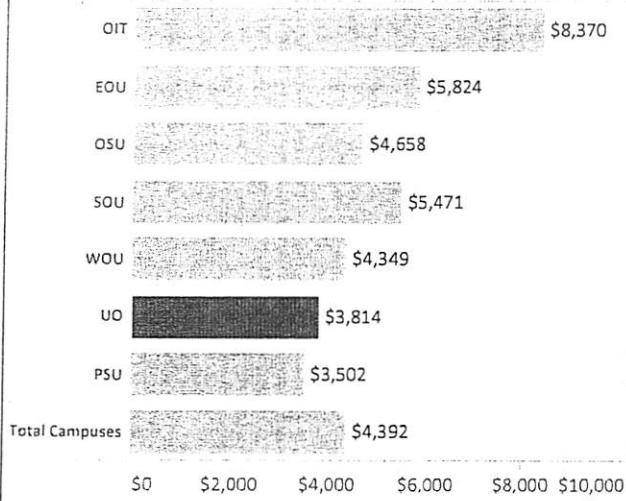
The University of Oregon charges simple interest on the total due amount not paid within the grace period. The annual rate is 9 percent. Periodic rate of interest is .75 percent per month, or fraction thereof, of the unpaid total due balance remaining on the account as of the tenth of the month.



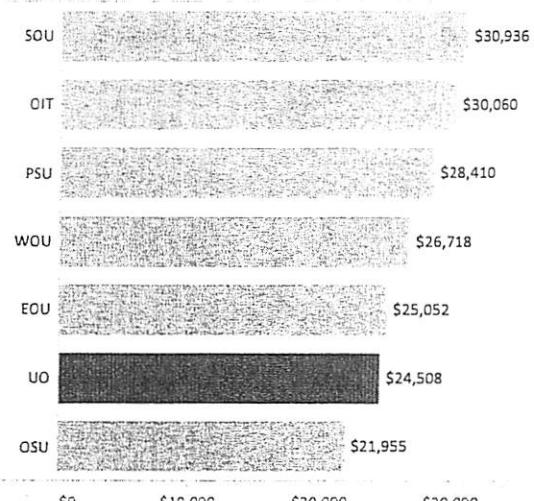
Supplemental Materials

UO Snapshot 2016

State Support in 2014-15 per Fundable Student FTE



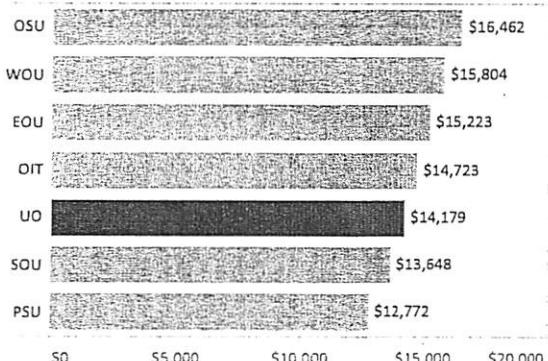
Average Debt at Graduation per Borrower, Class of 2014



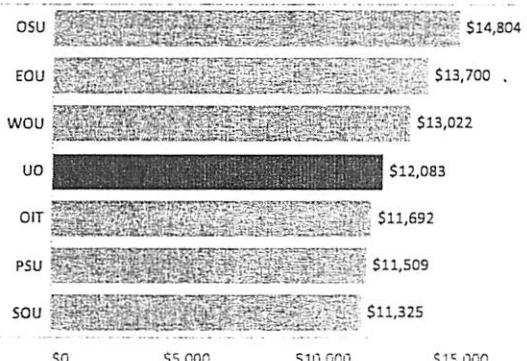
Source: OUS Budget Report Summaries.

Source: 2014-15 Common Data Set.

Average Net Price for First-Time Freshmen after Grants, 2013–14



Average Net Price for Low-Income Freshmen after Grants, 2013–14



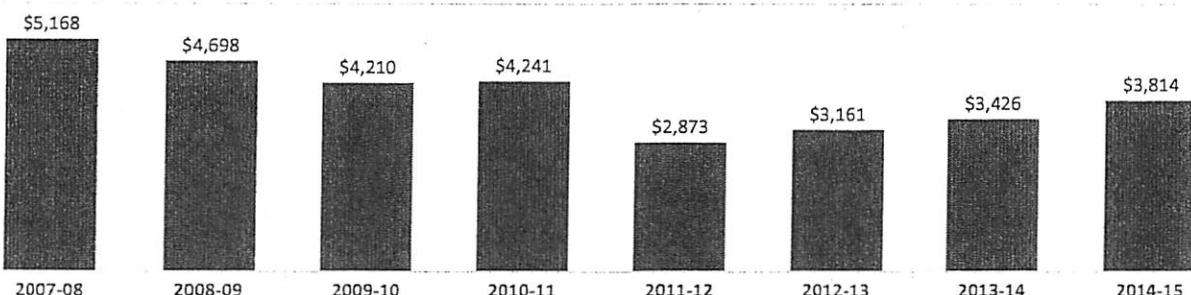
Average price for first-time, full-time, in-state students who receive any grant or aid.

Source: IPEDS

Average price for first-time, full-time, in-state students who have a family income between \$0 and \$30,000.

Source: IPEDS

State Support
State Support per Fundable Student FTE



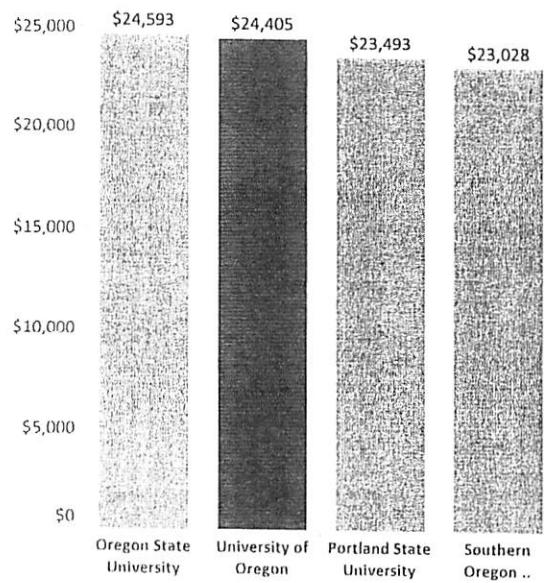
Source: OUS Budget Report Summaries.

Price of Attendance for the 2014-15 Academic Year among Oregon Publics

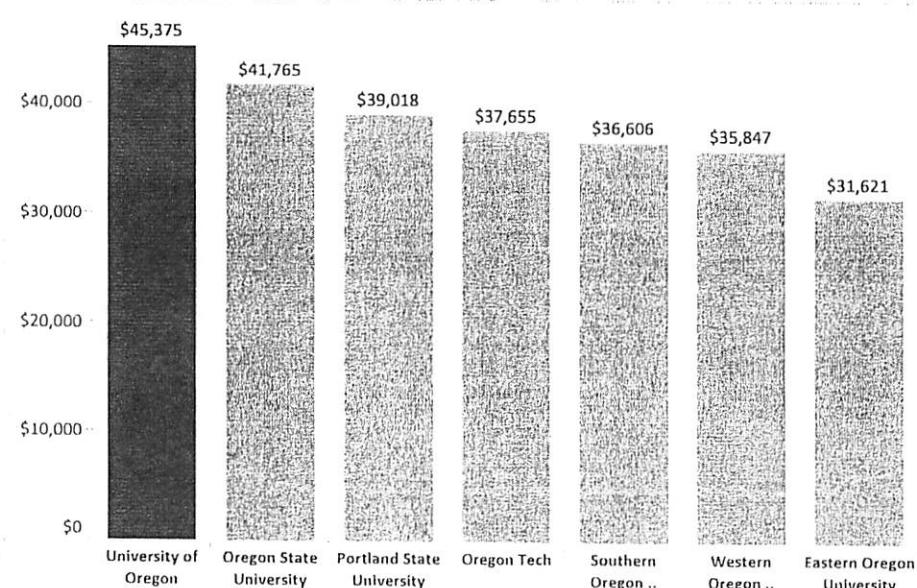
Institution	Resident Tuition and Fees	Nonresident Tuition and Fees	Room and Board	Books and Supplies	Other Expenses	Resident Total	Nonresident Total
Eastern Oregon University	\$7,440	\$17,509	\$9,642	\$1,425	\$3,045	\$21,552	\$31,621
Oregon State University	\$9,122	\$26,294	\$10,929	\$1,965	\$2,577	\$24,593	\$41,765
Oregon Tech	\$8,445	\$23,670	\$9,032	\$1,100	\$3,853	\$22,430	\$37,655
Portland State University	\$7,794	\$23,319	\$10,119	\$2,080	\$3,500	\$23,493	\$39,018
Southern Oregon University	\$7,701	\$21,279	\$11,682	\$960	\$2,685	\$23,028	\$36,606
University of Oregon	\$9,918	\$30,888	\$11,097	\$1,050	\$2,340	\$24,405	\$45,375
Western Oregon University	\$9,105	\$22,200	\$9,315	\$1,350	\$2,982	\$22,752	\$35,847

Source: IPEDS Student Charges (FY2015).

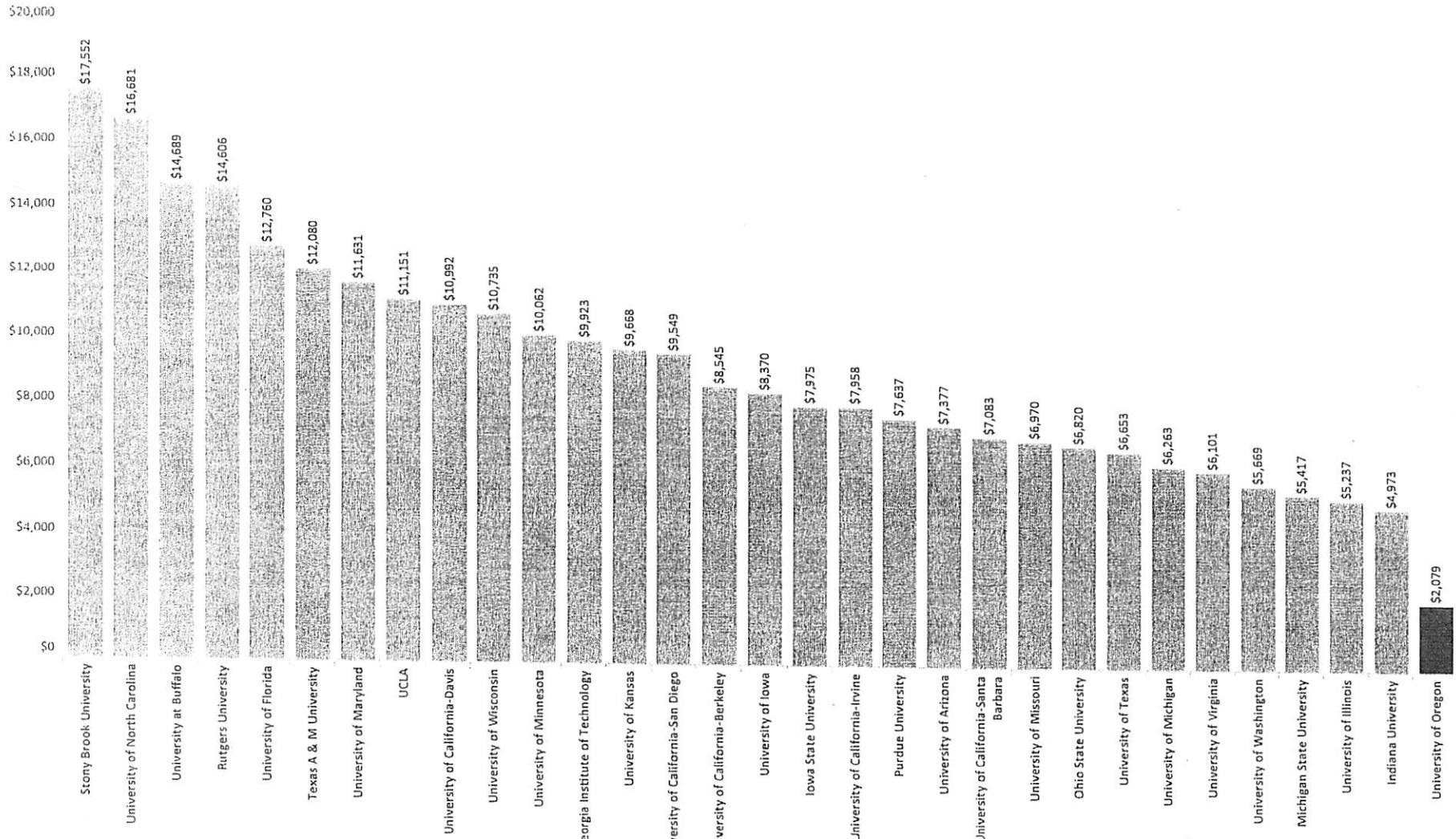
Total Price of Attendance for Residents



Total Price of Attendance for Nonresidents



State Appropriations per Student FTE among AAU Publics (FY2014)



Note: Penn State University, University of Colorado, and University of Pittsburgh are excluded from the table because Pennsylvania and Colorado have alternative funding mechanisms.
Source: IPEDS Finance (FY2014) and Enrollment (FY2014).

State Appropriations per Student FTE among AAU Publics (FY2014)

	FY14 State Appropriations	FY14 12-month FTE Enrollment	Appropriations per Student FTE
Stony Brook University	\$408,953,548	23,299	\$17,552
University of North Carolina	\$482,727,867	28,938	\$16,681
University at Buffalo	\$422,042,546	28,732	\$14,689
Rutgers University	\$684,235,000	46,845	\$14,606
University of Florida	\$605,890,000	47,483	\$12,760
Texas A & M University	\$630,839,784	52,223	\$12,080
University of Maryland	\$425,898,117	36,616	\$11,631
UCLA	\$468,085,000	41,977	\$11,151
University of California-Davis	\$359,928,000	32,746	\$10,992
University of Wisconsin	\$411,605,269	38,344	\$10,735
University of Minnesota	\$543,517,342	54,015	\$10,062
Georgia Institute of Technology	\$222,083,429	22,381	\$9,923
University of Kansas	\$241,886,852	25,019	\$9,668
University of California-San Diego	\$297,893,000	31,195	\$9,549
University of California-Berkeley	\$330,583,000	38,689	\$8,545
University of Iowa	\$233,695,000	27,920	\$8,370
Iowa State University	\$248,633,453	31,177	\$7,975
University of California-Irvine	\$246,560,000	30,983	\$7,958
Purdue University	\$299,725,746	39,246	\$7,637
University of Arizona	\$287,493,000	38,970	\$7,377
University of California-Santa Barb..	\$163,845,000	23,131	\$7,083
University of Missouri	\$215,532,438	30,924	\$6,970
Ohio State University	\$419,233,915	61,470	\$6,820
University of Texas	\$313,996,089	47,197	\$6,653
University of Michigan	\$279,233,000	44,581	\$6,263
University of Virginia	\$145,711,683	23,883	\$6,101
University of Washington	\$262,145,954	46,238	\$5,669
Michigan State University	\$249,597,800	46,076	\$5,417
University of Illinois	\$259,506,295	49,552	\$5,237
Indiana University	\$205,652,914	41,358	\$4,973
University of Oregon	\$49,430,860	23,771	\$2,079

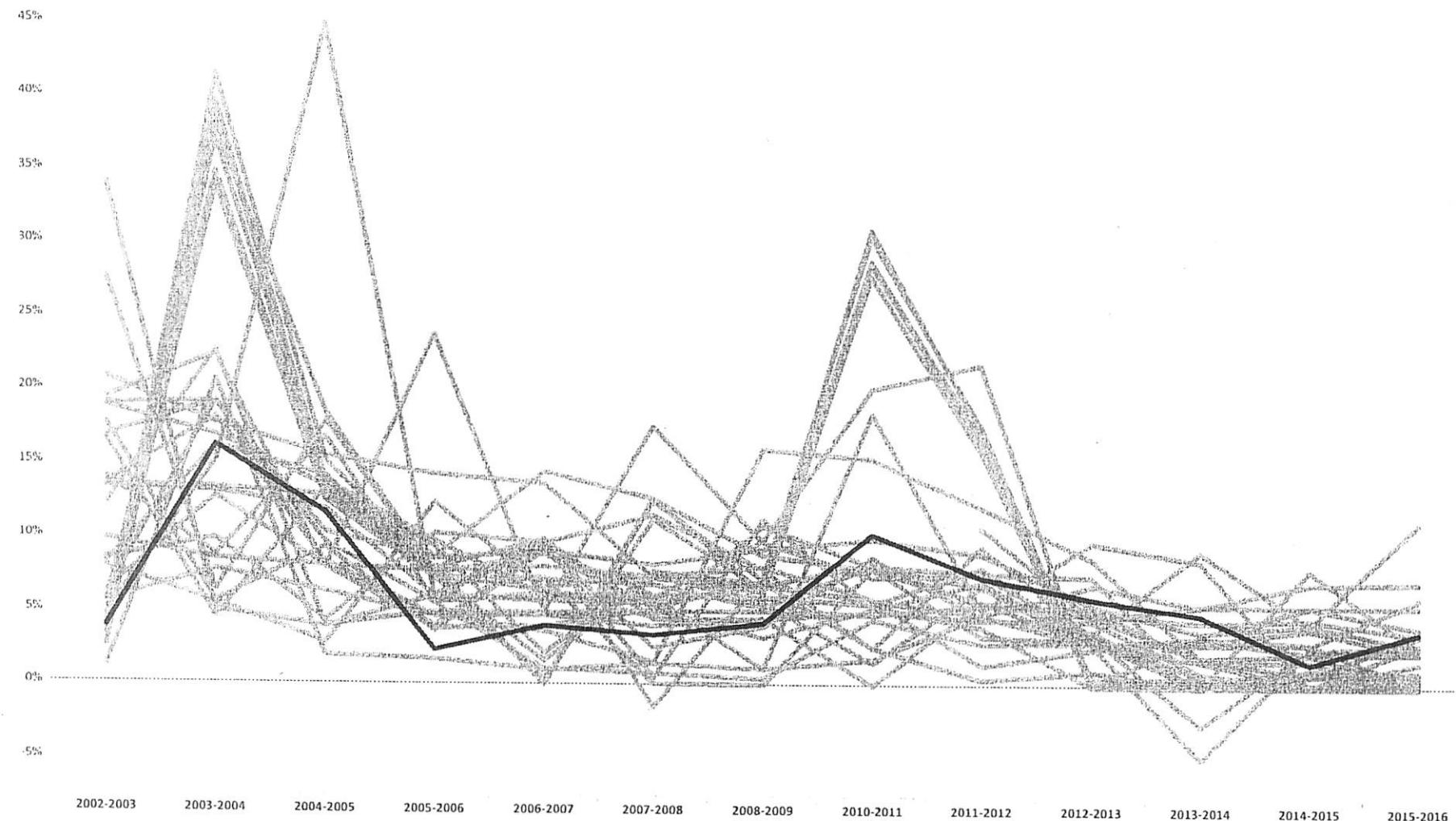
Note: Penn State University, University of Colorado, and University of Pittsburgh are excluded from the table because Pennsylvania and Colorado have alternative funding mechanisms.

Source: IPEDS Finance (FY2014) and Enrollment (FY2014).

PROGRAM DESCRIPTION
Full-time Undergraduate

RESIDENT STATUS
Resident

Year-over-year Increases in Tuition and Fees for Resident Full-time Undergraduate among Public AAUs
University of Oregon is in Green.



Source: AAUDE Tuition and Fees.

Board of Trustees of the University of Oregon

Resolution: Authorization of 2016 General Revenue Bonds

WHEREAS, ORS 352.087(1)(b) authorizes the University of Oregon (the "University") to borrow money for the needs of the University in such amounts, at such times, and upon such terms as may be determined by the University acting through its Board of Trustees (the "Board"); and

WHEREAS, ORS 352.408(1) authorizes the University to issue revenue bonds for any lawful purpose of the University in accordance with ORS chapter 287A, and to issue refunding bonds under ORS 287A.360 to ORS 287A.380 of the same character and tenor as the revenue bonds replaced; and

WHEREAS, Section 3.1 of the University Treasury Management Policy provides that the University may use debt or other financing agreements to meet its strategic objectives and, pursuant to Section 3.2 of the Treasury Management Policy, the Board, or its designated Committee, must authorize debt transactions, financing agreements, hedging instruments, and other derivatives when the par or notional amount is greater than \$5,000,000; and

WHEREAS, Section 3.4.2 of the University Treasury Management Policy authorizes the Treasurer to enter into financing transactions for the purpose of mitigating the risk of existing obligations and/or reducing the overall cost of debt; and

WHEREAS, the University has previously issued and has outstanding its General Revenue Bonds, 2015A in the aggregate principal amount of \$50,000,000 (the "2015 Bonds"), and the University now desires to authorize the issuance of one or more series of general revenue bonds on a parity with or subordinate to the pledge securing the payment of the principal of an interest on the 2015 Bonds in an aggregate principal amount not to exceed \$60,000,000; and

WHEREAS, ORS 352.087(1)(t) authorizes the University to delegate any and all powers and duties, subject to the limitations expressly set forth in law;

WHEREAS, the Board has considered the impact of the general revenue bonds and general revenue refunding bonds authorized by this resolution on the University's ability to achieve its mission and strategic objectives, the cost of issuing and paying the bonds, and how the bonds will affect the University's ability to meet its existing obligations, and has determined that it is in the best interests of the University to approve the issuance of the bonds as set forth in this resolution, and to delegate the powers of the Board related to the bonds to the Treasurer of the University, and her designee, to approve the sale of the bonds and certain terms of the bonds; and

WHEREAS, the Finance and Facilities Committee has referred this matter to the full Board as a seconded motion, recommending adoption;

NOW, THEREFORE, the Board of Trustees of the University of Oregon hereby adopts this resolution as follows:

1. Appointment of Authorized Representative. The Board hereby authorizes the Treasurer of the University, and her designee, each acting individually and on behalf of the University and not in his

or her personal capacity (the "Authorized Representative"), to act as the authorized representative for and on behalf of the University in connection with the issuance and sale of general revenue bonds (the "New Money Revenue Bonds") and general revenue refunding bonds (the "Refunding Revenue Bonds" and, together with the New Money Revenue Bonds, the "Revenue Bonds") to carry out the purposes and intent of this resolution. The signature of the Authorized Representative or his or her designee shall be sufficient to bind the University with respect to any Revenue Bonds, certificate, agreement or instrument related thereto, and shall be sufficient to evidence the Authorized Representative's approval of the terms thereof.

(a) Revenue Bonds Authorized.

(i) New Money Revenue Bonds. The Board hereby authorizes the issuance of not more than Sixty Million Dollars (\$60,000,000) in aggregate principal amount of New Money Revenue Bonds under ORS 352.087(1)(b) and/or ORS 352.408 for University purposes, to fund debt service reserves, if any, and to finance other costs related to issuing a series of New Money Revenue Bonds, including but not limited to capitalizing interest.

(ii) Refunding Revenue Bonds. The Board further hereby authorizes the issuance of Refunding Revenue Bonds under ORS 352.087(1)(b) and/or ORS 351.408 to defease, prepay or refund short-term or interim financing incurred under Section 3.4.1 of the University Treasury Management Policy, to defease, prepay or refund any or all of the payments to be made by the University in connection with bonds issued by the State of Oregon for the benefit of the University, to pay costs of issuance, and to pay defeasance, prepayment and refunding costs.

2. Special Obligations of the University. The Revenue Bonds shall be special obligations of the University that are payable solely from legally available revenues of the University that the University pledges to pay the Revenue Bonds.

3. Bond Sale Authorized. The Authorized Representative is hereby authorized, on behalf of the Board and without further action by the Board, to take any of the following actions that may be required if needed in connection with the issuance and sale of Revenue Bonds authorized herein:

(a) Issue the Revenue Bonds in one or more series and at different times; provided that any series of Revenue Bonds under this resolution shall be issued on or before June 30, 2017.

(b) Pledge all or any portion of the legally available revenues of the University to pay and secure the payment of the principal of and interest on each series of Revenue Bonds, and determine the lien status of each pledge.

(c) Apply the proceeds of any series of New Money Revenue Bonds to pay or reimburse costs of the University, to fund debt service reserves, if any, and to pay other costs related to issuing a series of Revenue Bonds, including but not limited to capitalizing interest.

(d) Determine whether to pay or refinance short-term or interim financing or to defease, refund or prepay University obligations including any or all of the payments to be made by the University in connection with bonds issued by the State of Oregon for the benefit of the University.

(e) Apply the proceeds of any series of Refunding Revenue Bonds to pay or refinance short-term or interim financing, to defease, refund or prepay University obligations including any or all of the payments to be made by the University in connection with bonds issued by the State of Oregon for the benefit of the University, to pay costs of issuance, and to pay defeasance, prepayment and refunding costs.

(f) Participate in the preparation of, authorize the distribution of, and deem final the preliminary and final official statements and any other disclosure documents for any series of Revenue Bonds.

(g) Establish the final principal amount, maturity schedule, interest payment dates, interest rates, denominations and all other terms for each series of Revenue Bonds; provided, that the true interest cost of any New Money Revenue Bonds shall not exceed eight percent per annum, and the final maturity date for any New Money Revenue Bond shall be on or before October 1, 2046.

(h) Select one or more underwriters or lenders and negotiate the sale of that series of Revenue Bonds to those underwriters or lenders, and execute and deliver one or more bond purchase agreements.

(i) Undertake to provide continuing disclosure for any series of Revenue Bonds in accordance with Rule 15c2-12 of the United States Securities and Exchange Commission.

(j) Apply for rating(s) for any series of Revenue Bonds.

(k) Draft and approve the terms of, and execute and deliver, one or more bond declarations which pledge all or a portion of the legally available revenues of the University to particular series of Revenue Bonds, make covenants for the benefit of owners of the Revenue Bonds, describe the terms of the Revenue Bonds that are issued under that bond declaration, and describe the terms under which future obligations may be issued on a parity with those Revenue Bonds.

(l) Appoint and enter into agreements with paying agents, escrow agents, bond trustees, verification agents, and other professionals and service providers.

(m) Issue any series of Revenue Bonds as taxable bonds, including as taxable bonds that are eligible for federal interest subsidies or tax credits.

(n) Issue any series of Revenue Bonds as governmental and/or 501(c)(3) tax-exempt bonds, hold public hearings, take actions and enter into covenants to maintain the tax status of that series of Revenue Bonds under the Internal Revenue Code of 1986, as amended (the "Code").

(o) Provide for the Revenue Bonds to be held in certificated or uncertificated form.

(p) Execute and deliver any agreements or certificates and take any other action in connection with the Revenue Bonds that an Authorized Representative finds will be advantageous to sell and issue the Revenue Bonds and carry out this resolution.

4. Ratification and Approval of Actions. The Board hereby ratifies and approves all prior actions taken on behalf of the Board or University related to such Revenue Bonds. The Board hereby

authorizes, empowers, and directs the Authorized Representative to take further actions as may be necessary or desirable related to such Revenue Bonds, including, without limitation, the execution and delivery of agreements necessary or desirable to carry out such actions or arrangements, and to take such other actions as are necessary or desirable for the purposes and intent of this resolution. **Notwithstanding the above, the Treasurer shall obtain approval from the chair of the Board and the chair of the Finance and Facilities Committee prior to executing final agreements necessary to issue such Revenue Bonds.**

5. **Effective Date.** This resolution shall take effect immediately upon adoption by the Board.

Trustee	Yes	No
Ballmer		
Bragdon		
Chapa		
Colas		
Curry		
Ford		
Gary		
Gonyea		
Kari		
Lillis		
Paustian		
Ralph		
Wilcox		
Willcox		

Date: _____

Recorded: _____