May 25, 2011

TO: MEMBERS OF THE STATE BOARD OF HIGHER EDUCATION

Meetings of the State Board of Higher Education will be held on June 2-3, 2011.

On Thursday, June 2, the Board will convene in an executive session pursuant to ORS 192.660(2)(i) to review and evaluate the employment-related performance of the chief executive officer of any public body, a public officer, employee, or staff member who does not request an open hearing for the purpose of discussing personnel matters. Pursuant to ORS 192.660(4), representatives of the news media are allowed to attend, but the Board requires that the discussions and any reports received in the executive session be undisclosed. Pursuant to ORS 192.660(6), no final action will be taken or final decision made in the executive session.

On Friday, June 3, the Finance and Administration Committee will convene at 8 a.m.; agenda items include one action item (REDCO Site License Agreement) and three discussion items (MWESB policy change review, 2011-12 work plan, and 2011-2013 budget planning).

Immediately following the Committee meeting, the full Board will convene in open session. The Board will take action on two items (2012-13 tuition and fees, and Board election of officers) and four consent items (authorization for land transfer [Tri-Met/PSU], WOU mission statement, mission alignment, and REDCO Site License Agreement). Two items will be discussed: a presentation from the Coalition of Communities of Color and the Oregon University System equity action/work plan.

Additionally, Board Committee chairs, the Chancellor, the president of the Interinstitutional Faculty Senate, and the chair of the Oregon Student Association will provide informational reports to the Board.

Immediately following the Board meeting, the Board will again convene in executive session pursuant to ORS 192.660(2)(i) to review and evaluate the employment-related performance of the chief executive officer of any public body, a public officer, employee, or staff member who does not request an open hearing for the purpose of discussing personnel matters. Pursuant to ORS 192.660(4), representatives of the news media are allowed to attend, but the Board requires that the discussions and any reports received in the executive session be undisclosed. Pursuant to ORS 192.660(6), no final action will be taken or final decision made in the executive session.
These meetings will be held in accordance with the time, location, and schedule listed below:

**Thursday, June 2, 2011**
12:00-5:00 pm Executive Session (public is excluded), ASRC 515 (Boardroom)
6:00-9:00 pm Board reception/dinner (by invitation only)

**Friday, June 3, 2011; ASRC 515 (Boardroom), PSU**
8:00-9:30 am Finance & Administration Committee
9:30 am-1:30 pm Full Board Meeting
2:00-5:00 pm Executive Session (public is excluded)

The Academic and Student Recreation Center (ASRC) building is located at 1800 SW 6th Avenue. Telephone messages for Board members and institution officials attending the meetings may be called to (503) 725-5700. If special accommodations are required, please contact the Board’s Office at (541) 346-5749 at least 72 hours in advance.

Cordially,

Charles L. Triplett III
Board Secretary
Executive Session of the Board

June 2, 2011
12:00–5:00 p.m.

AGENDA

1. CALL TO ORDER/Roll CALL

2. DISCUSSION ITEMS

a. Presidential Evaluations

On Thursday, June 2, the Board will convene in an executive session pursuant to ORS 192.660(2)(i) to review and evaluate the employment-related performance of the chief executive officer of any public body, a public officer, employee, or staff member who does not request an open hearing for the purpose of discussing personnel matters. Pursuant to ORS 192.660(4), representatives of the news media are allowed to attend, but the Board requires that the discussions and any reports received in the executive session be undisclosed. Pursuant to ORS 192.660(6), no final action will be taken or final decision made in the executive session.

3. ADJOURNMENT
AGENDA

1. CALL TO ORDER/ROLL CALL

2. ACTION ITEMS
   
   a. Minutes (May 2011)................................................................. Appendix A
   
   b. OUS and REDCO Site License Agreement (Simonton) ...................... 1
      The OUS has made plans to undertake a solar photovoltaic power purchase agreement program for all of its campuses. This objective includes a potential installed capacity of approximately 55 megawatts. The initial steps for the overall plan are to expediently execute a power purchase agreement covering the power generation from five megawatts of photovoltaic systems; installed across each of the seven OUS campuses in two phases during 2011 and 2012.

3. DISCUSSION ITEMS
   
   a. OUS, Equity Purchasing and Contracting Policy and Procedures (Bounds).............. 11
      It is the policy of the Oregon University System (OUS) that all businesses, including small, minority and women-owned businesses, shall be given the maximum practicable opportunity to compete for and be awarded contracts by the institutions within OUS. The goal of this policy is to expand economic opportunities for historically underrepresented businesses by encouraging participation in OUS contracting and purchasing.
   
   b. 2011-12 Proposed Work Plan (Kenton/Lewis) ........................................ 19
      A proposed work plan for June 2011 through June 2012 is forwarded for consideration by the Finance and Administration Committee. The plan is segregated by major themes, priorities, and activities for the year and a month-by-month schedule of discussion topics is offered for the Committee’s consideration.
   
   c. Proposed Approach to 2011-2013 Budget Allocation and the Fiscal Year 2011-12 Operating Budget Allocations (Kenton/Lewis) .............................. 23
      The proposed approach for the allocation of the Oregon University System’s 2011-2013 budget and the OUS 2011-12 Annual Operating Budgets is summarized in this report for discussion.

4. ADJOURNMENT
AGENDA

1. CALL TO ORDER/ROLL CALL/WELCOME

2. REPORTS
   a. Board Committees ................................................................. 27
      i. Academic Strategies
      ii. Finance & Administration
      iii. Governance & Policy
   b. Interinstitutional Faculty Senate (IFS) President
   c. Oregon Student Association (OSA) Chair
   d. Chancellor’s Report

3. DISCUSSION ITEMS
   a. Coalition of Communities of Color (Curry-Stevens/Maher) ............... 31
      The Coalition of Communities of Color, in partnership with researchers at Portland State University, has spent the last two years documenting racial disparities and released (in May 2010) a comprehensive report on the status of racial disparities in Multnomah County across 27 different systems and institutions. Dr. Ann Curry-Stevens and Nichole Maher will present key findings to the Board, focusing on racial and ethnic educational disparities, and offering a set of policy recommendations to reduce these disparities.
   b. OUS Action/Work Plan for Equity Initiatives (Francesconi/Andrews) .......... 33
      To enhance diversity opportunities within the OUS the OSBHE adopted a policy on diversity in March 2009. The OUS Action/Work Plan for equity was developed under the guidance of the Academic Strategies Committee with support from the OUS Academic Strategies Division. Following its endorsement in the ASC on April 28, 2011, the plan is now being brought forward for discussion with the full Board.

4. CONSENT ITEMS
   a. Authorization for Land Transfer and Easement ..................................... 37
      The Portland-Milwaukie Light Rail expansion will connect with the existing MAX Green Line at the intersection of SW 5th and SW Lincoln Streets, near the PSU’s Art Building and Science and Education Center and will continue east along SW Lincoln Street past PSU’s University Place Hotel site. To accommodate the project, PSU is requesting to
voluntarily transfer two parcels of land on the PSU campus totaling 9,643 square feet to TriMet at no cost.

b. WOU, Approval of Preamble, Mission Statement, and Core Themes

Western Oregon University examined its Preamble and Mission and created Core Themes as part of the review process necessitated by the new Northwest Commission on Colleges and Universities (NWCCU) accreditation standards.

c. OUS, Mission Alignment/Metrics

Both in response to Senate Bill 442 and the goals of the Board, the Oregon University System institutions have defined their missions, student access, academic program array, and research. These efforts are conveyed in the enclosed matrices with accompanying metrics. Individual campuses and the System, as a whole, will use this information to ensure the Board’s goals are met and that resources are effectively managed.

d. OUS and REDCO Site License Agreement

The OUS has made plans to undertake a solar photovoltaic power purchase agreement program for all of its campuses. The plan’s objective is an installed capacity of approximately 55 megawatts. The initial steps for the overall plan are to expediently execute a power purchase agreement covering the power generation from five megawatts of photovoltaic systems; installed across each of the seven OUS campuses in two phases during 2011 and 2012.

5. **ACTION ITEMS**

a. OUS, 2011-12 Proposed Tuition and Fee Rate and Policy Changes, Amendment of OAR 580-040-0040; 2011-12 Academic Year Fee Book (Kenton/Lewis)

The Board will review and approve the proposed tuition and fee rates for 2011-12.

b. Election of Board Officers (Kelly)

6. **PUBLIC INPUT**

7. **BOARD COMMENTS**

8. **ADJOURNMENT**
Executive Session of the Board
June 3, 2011
2:00–5:00 p.m.

AGENDA

1. CALL TO ORDER/ROLL CALL

2. DISCUSSION ITEMS

   a. Presidential Evaluations

      On Thursday, June 3, 2011, the Board will convene in an executive session pursuant to ORS 192.660(2)(i) to review and evaluate the employment-related performance of the chief executive officer of any public body, a public officer, employee, or staff member who does not request an open hearing for the purpose of discussing personnel matters. Pursuant to ORS 192.660(4), representatives of the news media are allowed to attend, but the Board requires that the discussions and any reports received in the executive session be undisclosed. Pursuant to ORS 192.660(6), no final action will be taken or final decision made in the executive session.

3. ADJOURNMENT
Board Materials
June 3, 2011
Portland, Oregon
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APPENDICES

A—F&A Committee Minutes, May 2011
B—2011-12 Academic Year Fee Book (Draft)
C—Report of Comments Received During Public Comment Period
D—Supplemental Information from University of Oregon Related to Proposed Fees for the
  Expansion of Erb Memorial Union and the Renovation of the Student Recreation Fee
E—Letters of Support for the EMU and SRC Proposed Project
OUS and REDCO Site License Agreement

STATEMENT OF NEED
Climate change is a significant focal point and priority in higher education. Presidents, faculty, students, and administrators are all dedicated to coordinating efforts and committing their institutions to environmental stewardship.

The Oregon University System ("OUS") has made plans to undertake a solar photovoltaic power purchase agreement program for all of its campuses. This objective includes a potential installed capacity of approximately 55 megawatts. The initial steps for this overall plan are to expeditiously execute a power purchase agreement covering the power generation from five megawatts of photovoltaic systems; installed across each of the seven OUS campuses in two phases during 2011 and 2012.

The Solar Power Project is one of five renewable energy demonstration projects that include geothermal, wave, bio-fuel, and wind that OUS has developed that can best leverage each institution’s unique research talents, Oregon’s natural resources, and available funding opportunities to achieve the following:

- Reduce the System’s carbon footprint
- Retain the System’s national leadership position in sustainability
- Allow student and faculty researchers to develop and test new technologies
- Increase the competitiveness of the System’s renewable energy curriculum
- Increase the value of the research, prior to commercialization
- Improve the Oregon economy by creating both short- and long-term job opportunities in emerging renewable energy industries

This project represents the largest system in the state of Oregon and the largest university-based contract for solar energy in the nation, and will provide 3 percent of all of OUS’ electrical energy needs while meeting state and campus goals for clean energy use and carbon neutrality in Oregon.

For a state that has among the lowest power rates in the nation to be able to move to clean energy resources, which are often more expensive than prevailing rates in Oregon, shows a deep commitment to carbon neutrality and sustainable management of resources. If Oregon can achieve this type of movement, any state should be able to do so. This is an example of saving the planet on a limited budget. We are leveraging dollars in ways that no university system has done before and our efforts can be shown as a model for other states as we embark on creating a carbon neutral campus at OIT—the first of its kind anywhere.

STATEMENT OF PROPOSED SOLUTION
The Systemwide solar project began in 2008 with a solar feasibility study, performed by BacGen Solar, at each campus to determine which parcels of land and buildings were most suitable for
future development. A request for proposals (RFP) was then initiated in 2009 based on the solar capacity outlined in the study. Since no state funding was provided directly for this project, proposers were asked to submit public/private partnership models leveraging state and federal incentives to provide the lowest possible cost of power to each campus. The solar arrays were to be owned by the proposer and a lease or site license would allow the equipment to reside on OUS property.

Unfortunately, due to a rewrite of the administrative rules at the Oregon Department of Energy, the selected firm was unable to obtain the most important component of the funding model, the Oregon Business Energy Tax Credit (BETC), and the project was delayed.

However, OUS continued to pursue the project by hiring Oh Planning and Design, a women-owned architectural firm from Portland, to provide limited architectural and engineering services needed to secure the BETC certifications. As the certifications were secured, the economy continued to decline, thereby eliminating most Oregon companies as potential partners to participate in the tax credit program. Again the project was delayed as companies were sought with sufficient Oregon tax liability and the willingness to participate in the project during uncertain times.

After 14 months of searching, Renewable Energy Development Corporation (REDCO), a Utah-based renewable energy development firm, has presented a proposal to provide solar power to each OUS campus in two phases. The team also includes two Fortune 500 companies, MDU Resources and Wells Fargo Bank, as investors willing to utilize the state and federal tax incentives, allowing the power purchase rate to be at or below the current electrical utility rates. The terms of the deal are summarized in Table A. REDCO has also proposed to provide Renewable Energy Internships and assist in developing curriculum related to elements of the project.

In order to make the exciting results of the project more accessible to students, staff, and visitors, REDCO will install interactive kiosks on each campus that will be tied to the solar data stream from the inverter data at each campus. Kiosk users will be able to interact directly with the system, learn how it works, track its effectiveness, and analyze its environmental impact. The information will also be made available on each university’s website.

**BOARD AND LEGISLATIVE CONSIDERATIONS**

In accordance with Oregon Administrative Rule (“OAR”) 580-060-0050, the Chancellor’s Office, on behalf of Oregon Institute of Technology, Eastern Oregon University, and Oregon State University (“Universities”), requests authority from the Oregon State Board of Higher Education to execute a site license agreement to REDCO to use a portion of campus properties, as defined in Table B, to install, maintain, and operate three solar photovoltaic systems. The Universities will purchase electricity from the solar photovoltaic systems under a separate power purchase agreement. The purchase of electricity is exempt from a competitive process, regardless of value, in accordance with OAR 580-062-0020(7).
**Facility Information:**
- The land to be included in the site license totals approximately 27 acres (see attached maps in Table B for location of the property).

**Schedule:**
- Phase I of the project will be completed by December 31, 2011.
- Phase II is scheduled for completion in 2012.

**Financial Considerations:**
- The project will not require any capital outlay of funds and the purchase of solar generated electricity will be equal to or less than the current cost of power provided by each university’s utility company. The term of the site license and power purchase agreements is 20 years; however, each campus has the option to purchase the solar photovoltaic arrays for the fair market value at any time after year-six.

**Legal Considerations:**
- As a template, the Oregon Department of Justice (DOJ)-approved documents from the Oregon Department of Parks and Recreation are being used. Upon legal sufficiency approval by the DOJ and the Universities, the Chancellor or designee will execute the site license agreement.

**Summary of Site License Agreement:**
- Term of license: 20 years.
- A separate Solar Power Purchase Agreement will govern the terms of electricity purchases generated from the Licensee.
- Requires local Utility approval of interconnection.
- Operation and maintenance is the responsibility of Licensee.
- Construction labor requirements: Prevailing Wage.
- Performance/insurance requirements: Public Works Bond, Commercial General Liability, Property Insurance, and Automobile Liability.

**STAFF RECOMMENDATION TO THE COMMITTEE**
Staff recommend that the Finance and Administration Committee authorize the Chancellor, or designee, to execute a Site License Agreement to REDCO for the three parcels of land outlined in Table B, upon approval of each of the Universities and DOJ legal sufficiency review, and forward to the full Board for approval.

*(Committee and Board action required.)*
Table A

**OUS Solar Energy Implementation Project**

**Objective:** In light of budget concerns facing higher education in the state of Oregon and a powerful move towards environmental responsibility, we are proud to offer a turnkey, highly cost effective solar energy system on each campus within the Oregon University System. Recent studies now show that the majority of incoming freshmen are choosing their schools based in part on the institution’s reputation for being “green,” and nothing will say OIT is climate committed louder than its own solar energy facility.

**Timing:** The projects are being divided into two phases:

- **Phase 1:** A total of 4.9 MW of solar generation capacity divided into three separate solar arrays on each of the Oregon Institute of Technology, Eastern Oregon University and Oregon State University campuses, to be fully constructed prior to December 31, 2011.

- **Phase 2:** Working with personnel representing each of the remaining Universities, sites will be selected on each of the remaining campuses to incorporate solar generation systems during 2012. An expected 500kW will be installed.

The completion of both phases will mark the project as the largest solar energy system in the state of Oregon and the largest at any university system in the United States (the current record is held by Colorado State University system at 5.0 MW).

REDCO is pleased to provide this project summary for the implementation of a solar energy system.

**Oregon Institute of Technology**

<table>
<thead>
<tr>
<th>Estimated Annual System Output (kWh)</th>
<th>3,321,600</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Size (kilowattsDC)</td>
<td>2,500</td>
</tr>
</tbody>
</table>

**Eastern Oregon University**

<table>
<thead>
<tr>
<th>Estimated Annual System Output (kWh)</th>
<th>2,767,625</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Size (kilowattsDC)</td>
<td>2,000</td>
</tr>
</tbody>
</table>
Oregon State University

<table>
<thead>
<tr>
<th>Estimated Annual System Output (kWh)</th>
<th>563,800</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Size (kilowatts DC)</td>
<td>435</td>
</tr>
</tbody>
</table>

REDCO will provide OIT, EOU, and OSU with a turnkey solar energy system, managing all of the permitting, financing, incentive applications, engineering, construction, and commissioning for the project. REDCO’s team will include its construction partner, Oregon Electric Group (one of Oregon Business Magazine’s 100 Best Green Companies) and engineering partner McCalmont Engineering, among the most experienced solar engineers in the world, with over 2,000 successful solar installations.

In order to provide the lowest energy cost possible and the greatest energy cost savings, REDCO has also partnered with two Fortune 500 companies who will invest in the project utilizing available Federal solar energy tax incentives and the Oregon State BETC tax credit incentives procured for the project by OUS.

### Project Benefits

<table>
<thead>
<tr>
<th>Direct Energy Cost Savings During 20-Year PPA</th>
<th>PPA kWh Rate = Under the solar PPA, OIT, EOU, and OSU will pay the same $0.041/kWh to $0.048 for all of the power generated by the system that it currently pays, but there will be an extremely low, fixed annual escalator of 2.5%, for 20 years. Offering total predictability, in Year 20, OIT will only pay a known $0.067 cents/kWh, less than half of the most conservative projected utility grid rate of $0.142 cents per kWh. While EOU and OSU will pay $0.078 cents/kWh, versus the most conservative projected utility grid rate of $0.166 cents per kWh.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Power Rate = The historical annual escalator for the state of Oregon has averaged 6.46% over last 10 years, with projected cost increases being much higher based on current rate cases pending in Oregon and possible cap and trade legislation. Using the historical data, the utility grid rate is conservatively projected to be $0.142 to $0.166 cents per kWh by year 20.</td>
<td></td>
</tr>
<tr>
<td>Life of System Savings</td>
<td>Direct energy cost savings are projected to be very substantial over the 25 year warranted life of the system. Projected savings: OIT: $3,334,629 EOU: $3,253,296 OSU: $662,601 The solar panels (made in Oregon), carry a 25-year warranty but frequently produce for more than 40 years at 80% efficiency.</td>
</tr>
<tr>
<td><strong>Buy-Out Option</strong></td>
<td>Each campus will retain the right after the IRS compliance period (following Year 6) to purchase the system from REDCO at a mutually agreed upon fair market value, consistent with the applicable provisions of the Internal Revenue Code.</td>
</tr>
<tr>
<td>-------------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>RECs/Carbon Credit Ownership</strong></td>
<td>All RECs/Carbon Credits will be passed to the campuses for the solar power generated under the PPA, allowing the University to take a meaningful step toward fulfilling its carbon commitments.</td>
</tr>
</tbody>
</table>

### Renewable Energy Internships

In conjunction with this project, REDCO is pleased to offer a semester-long internship opportunity for well-qualified students during each of the initial five years of the project. This internship would afford the selected student the opportunity to gain highly relevant experience within the alternative energy industry. The student would participate in every step of renewable energy project development, including the financing, engineering, and installation phases.

The selected student will work closely in a “hands-on” fashion with both REDCO and Oregon Electric team members, as well as spending time with the REDCO senior management team in its corporate offices.

### Renewable Energy Project Development Curriculum

The REDCO team is willing and able to assist OIT, EOU, and OSU professors in developing a Renewable Energy Project Development Curriculum through any department or college, as appropriate and upon request. Each renewable energy project has elements of finance (tax equity, debt, equity), accounting (tax, GAAP), real estate (procurement, land use, environmental), engineering (electrical, structural, soils, etc.), corporate structuring, mergers and acquisitions, permitting (environmental, transmission, and interconnection), and numerous general business concepts.

### Solar Information Kiosks

In order to make the exciting results of this project more accessible to students, staff, and visitors, REDCO will install one to three interactive “green kiosks” on each campus. These kiosks would be directly tied to the solar inverter data stream and display real-time output data from the operating solar facility. Kiosk users will be able to interact directly with the system: learn how it works, track its effectiveness, and analyze its positive environmental impacts. REDCO will also make all of this information available to the University’s IT department so the data can also be shown on the University’s website.

The architecturally designed kiosks may be situated almost anywhere on campus, such as in the college union or library.
The Oregon public, both local to each campus and throughout the state, has a vested interest in its higher education system. These solar projects prove that OIT, EOU, OSU, and the University System are progressive, deeply climate conscious, and, perhaps most important given today’s economic challenges, extremely focused on cost savings wherever possible. These facilities will save significant levels of direct energy cost and help prove that the OUS and each of its campuses “walk the talk.”

**Project Financial Support**

REDCO is teaming with MDU Resources Group, Inc. and Wells Fargo Bank to finance this project. Both MDU Resources and Wells Fargo are listed among the Fortune 500 and MDU Resources is the parent company of our installation partner, Oregon Electric.

**Contract Documents**

The documents governing this transaction have been created by the Oregon University System in conjunction with the Oregon Department of Justice and were drafted with strong protections for each respective university. The agreement terms have already been accepted in principle in their draft form, ensuring that contracts are expediently executed and projects are successful for all parties.

**Interconnection/Utility Relations**

All of the OUS projects will be “net metered” under current Oregon law, working closely our local serving utilities. For OIT, we are working with Pacific Power & Light management to ensure that the planned net metering interconnection meets all applicable standards.
Table B

**EOU CAMPUS SOLAR FACILITY**

**IDENTIFIED AREA FOR SOLAR FACILITY:**
- 2.1 / 1.2 MW
- 330' x 1150'
- 379,500 sf
- 8.7 ac
OSU SOLAR FACILITY ‘PLOT’

Fish Disease Lab

IDENTIFIED AREA FOR SOLAR FACILITY
439.92 kW-DC
335' x 275'
92,125 sf
2.1 ac
OUS, Equity Purchasing and Contracting Policy and Procedures

INTRODUCTION
After discussion at the October 2010 Board meeting, the Board requested staff examine and update existing OUS contracting and purchasing policies and procedures as they relate to Minority-owned, Women-owned, and Emerging Small Businesses (MWESB), collectively referred to herein as Historically Underrepresented Businesses.

PROCESS
Staff assembled a workgroup consisting of campus representatives from UO, OSU, PSU, OIT, and the Chancellor’s Office across purchasing and capital construction departments. The workgroup discussed potential improvements to current practices and drafted a policy and accompanying procedures that reflect the Board’s goals to achieve annual improvement in the utilization of Historically Underrepresented Businesses. The policy requires specific annual reporting and targeted outreach. The policy also encourages the OUS institutions to develop outreach plans in accord with the priorities of their leadership and local communities. Staff has worked to facilitate processes Systemwide in order to develop uniform recordkeeping processes and provide support for outreach efforts.

The policy calls for annual reports provided by the OUS institutions and presented to the Board in order to provide consistent annual data across institutions and to serve as a forum to share successful outreach efforts. These reports will also be used as part of the institution’s presidential evaluation process, as may be more specifically defined within existing and future Board policies.

The development of this policy also included informal feedback from members of the business community and the Governor’s Office.

Following a review and comment period among the vice presidents for finance and administration and the presidents of the OUS institutions during the past month, staff will lead a discussion with the Committee regarding the Equity Purchasing and Contracting Policy. Staff expects to present the policy to the Board at its July meeting.

POLICY DRAFT

EQUITY CONTRACTING AND PURCHASING AND DATA REPORTING PROCEDURES

I. PURPOSE
It is the policy of the Oregon University System (OUS) that all businesses, including small, minority and women-owned businesses, shall be given the maximum practicable opportunity to compete for and be awarded contracts by the institutions within OUS. The goal of this policy is to expand economic opportunities for historically underrepresented businesses by encouraging participation in OUS contracting and purchasing.
ORS 351.070(2)(c) requires the Board to adopt policies and procedures that achieve results related to the participation of Minority, Women and Emerging Small Businesses (MWESBs), as defined by the State of Oregon, that equals or exceeds the standards in effect on July 17, 1995. The Board has further delegated its authority to the institutions under ORS 351.060(9) and the institutions have further delegated their authority for certain types of contracts and purchases to departments and employees pursuant to their specific institutional policies. OAR 580-061-0000(1)(f) provides that OUS employees should encourage participation by MWESBs. This requirement is further set out in OAR 580-061-0030. The Board’s Policy on Diversity, approved on March 6, 2009, provides that the Board is committed to vendor and contracting practices that encourage and promote participation by MWESBs and requires periodic reports to the Board by the Chancellor and the presidents of each institution on progress in vendor and contracting initiatives and practices.

This policy implements these requirements. It includes targeted outreach efforts aimed at increasing opportunities for a wide range of businesses, including certified MWESBs and minority and women-owned businesses that are not currently certified by the Oregon Business Development Department (OBDD) or have chosen an alternative agency for certification. No provision of this policy is intended to provide for or encourage and the policy should not be construed as providing for or encouraging the granting of any unlawful preferences in OUS contracting; the provisions of this policy shall be implemented in accordance with the requirements of state and federal law.

II. DEFINITIONS
All capitalized terms not defined in this policy have the definitions set out in OUS rules.

Certified MWESB: An MWESB certified by the Oregon Business Development Department

Historically Underrepresented Business: Certified and self-identified MWESBs and firms certified federally or by another state or entity with substantially similar procedures to the State of Oregon.

Management Plan: A plan to increase the diversity of a business’ workforce and to subcontract with or purchase from Historically Underrepresented Businesses. The Management Plan may include the business’ nondiscrimination practices, subcontracting strategy, workforce diversity plan, and outreach plan to increase participation by Historically Underrepresented Businesses. Institutions are also encouraged to consider past performance of businesses in regards to workforce diversity and subcontracting plans as part of the Management Plan evaluation. The Management Plan, except for any percentage goals to utilize Historically Underrepresented Businesses, shall become part of the Contract.

Outreach Plan: An institution’s plan to increase utilization of Historically Underrepresented Businesses
III. OUTREACH
Each institution shall develop an Outreach Plan. At the discretion of the institution, an Outreach Plan may include elements such as: vendor fairs, small group meetings between Historically Underrepresented Businesses and persons who solicit and enter into contracts for the institution, technical assistance for Historically Underrepresented Businesses, and dissemination of resources to institution employees with purchasing authority. The Outreach Plan may also include outreach to businesses owned by disabled veterans.

IV. CONSTRUCTION-RELATED SERVICES, PROFESSIONAL CONSULTANTS, AND CAPITAL CONSTRUCTION
A. Retainer Program for Construction Related Services

All contracts with a contract value greater than $50,000 that are awarded under the Retainer Program for Construction Related Services shall require a Solicitation Effort to at least two (2) Historically Underrepresented Businesses.

B. Retainer Program for Professional Consultants

All contracts with a contract value greater than $100,000 awarded under the Retainer Program for Professional Consultants shall require a Solicitation Effort to at least two (2) Historically Underrepresented Businesses professional consultants.

C. CM/GC and Design/Build Capital Construction Projects

All RFPs for capital construction projects and associated professional consultants utilizing CM/GC or Design/Build processes shall include a Management Plan by the proposer as part of the evaluation criteria. At least 10 percent of the total points allocated for evaluation shall be allocated to the Management Plan.

D. Solicitation Effort

For purposes of this section, Solicitation Effort means:

1. Contacting at least two (2) Historically Underrepresented Businesses, if available, individually by appropriate means (letter, fax, e-mail or telephone) to alert them of the contracting opportunity; and
2. Providing the Historically Underrepresented Businesses the same amount of time to respond to the proposal as non-Historically Underrepresented Businesses; and
3. If the institution solicits bids without posting an RFP on the OUS website, posting the names of the contractors that the institution has chosen to submit bids on the OUS Business Opportunity Capital Construction Subcontracting Opportunities website so that Historically Underrepresented Businesses can contact them to provide their services as subcontractors or suppliers; OR
4. If a significant portion of the Contract will be subcontracted to other businesses, per the
determination of the institution, the inclusion of a Management Plan as part of the
evaluation criteria. The evaluation of the Management Plan must represent at least
10 percent of the total points allocated for evaluation.

V. PURCHASING OF GOODS OR SERVICES
All Informal Procurements with a contract value of more than $25,000 for purchase of goods or
services under a competitive process shall require a Solicitation Effort to at least one (1)
certified MWESB firm.

A. Solicitation Effort
   For the purposes of this section, Solicitation Effort means:
   1. Institutions shall contact one Certified MWESB, if available, by appropriate means
      (letter, fax, e-mail or telephone) to alert them of the contracting opportunity and
      provide them reasonable notice to respond.
   2. If no Certified MWESBs are available for the applicable solicitation, Self-identified
      MWESBs or firms certified by a state, the federal government or other entities, as
      available, may be used to satisfy the requirements of this section.

VI. RECORDS
Institutions shall keep a record of all Solicitation Efforts with its solicitation documents and in
accordance with the OUS records retention rules.

VII. EMERGENCY PROCUREMENTS AND OTHER EXEMPTED CONTRACTS
This policy is inapplicable to Emergency Procurements. This policy is inapplicable to any
contract exempted from competitive procurement under existing OUS policies or rules.
Notwithstanding the foregoing, institutions are still strongly encouraged to contact Historically
Underrepresented Businesses for Emergency Procurements or exempt contracts.

VIII. Annual Report
A. Each institution must submit an Annual Report on its equity contracting and purchasing
efforts to the OUS Chancellor’s Office by November 1. Reports will be presented to the
State Board of Higher Education annually.

B. The Annual Report shall include data on utilization of Historically Underrepresented
Businesses for capital construction projects and goods or services purchases for the most
recently completed fiscal year. The Annual Report will also compare utilization to the
previous year’s utilization. Institutions may choose to include comparisons to data from any
other previous fiscal year, as available.

   1. Utilization data shall be separated into the following categories:
      a) Certified Minority Business Enterprises;
      b) Certified Women Businesses Enterprises;
c) Certified Emerging Small Business Enterprises; and

d) Self-identified MWESBs and MWESBs certified by another state, the federal government, or some other certifying entity whose certification processes are substantially similar to the processes used by the OBDD.

2. The Annual Report must include utilization data from the contracts with firms within the categories listed in 1(a), (b), and (c). The Annual Report may include utilization data from contracts with firms within the category listed in 1(d). The Annual Report may also include utilization data from contracts with non-MWESB firms that subcontract with Historically Underrepresented Businesses.

3. The Annual Report shall include data on Historically Underrepresented firms that are subcontractors on capital construction projects. The OUS Chancellor’s Office shall set out the format for reporting this data.

4. The Annual Reports shall include the total number of Historically Underrepresented Businesses that did business with the institution during the most recently completed fiscal year.

5. All utilization data shall be reported as a percentage of total covered expenditures and as the total value of the covered contracts as set out below. The expenditure categories listed in Addendum 1 shall be excluded from the report.
### Required Data Fields for Annual Report

1. **Dollar Value**

<table>
<thead>
<tr>
<th></th>
<th>Capital Construction (including subcontracting)</th>
<th>Goods and Services</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Certified Minority Business Enterprises</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Certified Women Business Enterprises</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Certified ESBs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total of 1-3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Self-identified MWESBs and MWESBs certified by other than OBDD</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Total of 1-4</td>
<td></td>
<td></td>
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</tbody>
</table>

2. **Percentage of Total Expenditures**

<table>
<thead>
<tr>
<th></th>
<th>Capital Construction (including subcontracting)</th>
<th>Goods and Services</th>
<th>Total</th>
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<tr>
<td>Total of 1-4</td>
<td></td>
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</tbody>
</table>
3. Number of Historically Underrepresented Businesses doing business with institution

<table>
<thead>
<tr>
<th></th>
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<th>Goods and Services</th>
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<tr>
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</tbody>
</table>
ADDENDUM 1

Excluded Expenditure Categories

[To be completed.]
2011-12 Proposed Work Plan

The following is a proposed work plan for June 2011 to June 2012 for consideration by the Finance and Administration Committee. First, this work plan is segregated by major themes, priorities, and activities for the year. Next, a month-by-month schedule of discussion topics is offered for the Committee’s consideration.

MAJOR THEMES, PRIORITIES, OR ACTIVITIES FOR THE YEAR

- Governance changes and passage of SB 242
  - Development of performance compact
    - Different format for funding requests for both operating and capital
      - Impact of SB 909 and Governor’s Investment Board
      - New/revised tuition and fee policies
      - Impact on the RAM allocation model
    - Review of approval authority: Board, F&A Committee, Chancellor, Presidents
      - Approval of capital projects funded from non-State sources
      - F&A Charter update
    - Transition for risk management programs
    - Transition for legal services
    - Implementation of new tuition and fee process
    - Continued refinement of Internal Bank, including investment management, earnings distribution, amounts for need-based aid, debt policies, etc.
    - Review of CO staffing/funding/budget
  - Follow-up on audit comments
    - Review of control structure
    - Review of key personnel
    - Consideration of shared services
      - Grant post award accounting and reporting
      - Fixed assets
  - Collective bargaining processes and preparations
    - Classification/compensation
      - Consulting advice
      - Long-term plan to update classification and compensation structure for classified employees
  - IT Planning
    - Fifth site operations and hardware (capital) needs
    - Short-term – adjust to budget reductions
    - Long-term – planning
  - Internal audit peer review
  - Procurement policy update
    - MWESB
    - Green procurement/buy local
• Capital budgeting and planning
  o Performance metrics

PROPOSED DETAILED SCHEDULE

June 2011 (In-person meeting)
• F&A work plan for 2011-12
• MWESB Policy change review for Board approval in July
• 2011-12 budget planning
• Risk management transition planning (continued)
• Legal services transition planning (first discussion)

July 2011 (In-person meeting)
• Quarterly Internal Audit progress report
• 2011-12 budget allocation discussion
• Legal services – transition planning
• F&A Charter review and update discussion
• Tuition and aid policy discussion

August 2011
• No meeting planned

September 2011
• Risk management transition planning (cont.)
• Legal services transition planning (cont.)
• Finalize F&A Charter updates for Board approval in October
• Possible bond sale
• OSC final plans and approvals – assumes City Council approves in July

October 2011 (In-person meeting)
• Financial statement analysis
• 4th quarter 2010-11 Management report
• 4th quarter 2010-11 Investment Report
• Quarterly Internal Audit progress report
• Risk management transition planning (cont.)
• Legal Services transition planning (cont.)

November 2011
• 1st Quarter 2011-12 Management report
• 1st Quarter 2011-12 Investment report
• Risk management transition planning (cont.)
• Legal Services transition planning (cont.)
• Annual Athletics financial review
• CO Control Structure and Key Personnel

December 2011
• No meeting – Board retreat

January 2012 (In-person meeting?) Proposed Effective Date of SB 242
• Review policies for items to delegate to campuses
• Quarterly Internal Audit progress report
• 2012 Internal Audit plan discussion and approval
• Green procurement policy updates (first discussion)
• Moss-Adams annual report to the Committee
• PSU and WOU Control Structure and Key Personnel

February 2012
• 2nd Quarter Management Report
• 2nd Quarter Investment report
• Possible bond sale
• Continued discussion of campus delegation
• OSU and SOU Control Structure and Key Personnel

March 2012 (In-person meeting)
• Review legislative concepts for 2013-2015 session
• UO, OIT, and EOU Control Structure and Key Personnel

April 2012
• Planning for 2013-2015 budget — identification of priorities and themes
• Green procurement policy update review for Board approval in June
• Classification and Compensation Study update

May 2012
• Review preliminary tuition proposals from campuses for Board approval in June
• 3rd Quarter Management Report
• 3rd Quarter Investment Report
• Quarterly Internal Audit progress report
• Budget planning for 2013-2015
• Discussion of 2012-13 operating budget principles
June 2012 (In-person meeting)

- Operating budget request for 2013-2015 — prioritization
- Capital budget request for 2013-2015 — prioritization
- Approve operating budget allocations for 2012-13
- Board approval of tuition and fee rates for 2012-13
Proposed Approach to 2011-2013 Budget Allocation and the Fiscal Year 2011-12 Operating Budget Allocations

The proposed approach for the allocation of the Oregon University System’s 2011-2013 budget and the OUS 2011-12 Annual Operating Budgets is summarized in this report for discussion.

Although the OUS budget has yet to be finalized by the legislature, current discussions indicate that funding will be at the Governor’s Balanced Budget level, subject to a 3.5 percent holdback to ensure adequate ending balances for the state. In anticipation of a Legislative Budget Note on tuition increases, discussions were held with the Oregon Student Association. OSA is in agreement with the proposal noted below; however, exact wording may change in the final budget note adopted by the legislature.

In adopting the budget for the Department of Higher Education, the legislature intends that increases in the rates for tuition paid by resident undergraduate students at OIT, OSU, PSU, and UO not exceed an average of 8 percent for the two years of the biennium and may not exceed 9 percent in any given year. Increases in the rates for tuition paid by resident undergraduate students at all other institutions (EOU, SOU, and WOU) may not exceed an average of 6.5 percent for the two years of the biennium, and 7.5 percent in any given year. The Department shall report to the legislature by March 31, 2012, regarding increases in the rates for tuition paid by resident undergraduate students. If the State Board of Higher Education proposes to increase rates in excess of the legislatively-intended rates stated above, it shall report to the Emergency Board or Joint Committee on Ways and Means prior to approving such an increase.

BACKGROUND AND GUIDING PRINCIPLES FOR 2011-2013

The proposed allocation of the 2011-2013 General Fund budget to the seven campuses, the Statewide Public Services, and the Chancellor’s Office will be in accordance with legislative directives, Board policies, and agreed upon principles and processes as expressed in the following guiding principles:

Guiding Principles for the 2011-2013 Budget Allocation Process

1. Compliance with the OUS Board’s expectations and progress toward the Board’s priorities, including:
   a. Increasing the education level of Oregon’s adults;
   b. Providing high quality education;
   c. Providing research for an innovative and successful Oregon; and
   d. Contributing to the civic and economic success of communities throughout Oregon.

2. Compliance with legislative expectations and representations;

3. Focus on access to education and affordability for all qualified students, with incentives to improve retention, increase graduates, and improve student success;
4. Use of the Resource Allocation Model (RAM) to provide a basis of distributing General Fund support among campuses, including modifications to support recommendations made in the 2011-2013 Governor’s Balanced Budget (details discussed in the section on Distribution of General Funds below);

5. Acknowledge campus differences while striving to maintain the financial integrity of all campuses within OUS;

6. In accordance with the Governor’s Budget, reserve a portion of State General Fund for regional funding to meet campus’ financial sustainability requirements as well as achievement of campus-specific Board goals; and

7. If final appropriations are sufficient, reserve funds for initiatives to advance student success goals or to recognize specific campus achievements in student success.

The recommended annual distributions of state General Fund through the OUS RAM will be developed to comply with the operating budget bill for OUS to be passed by the 2011 Legislative Assembly. Due to fiscal pressures stemming from the 2001 recession, the fundable student FTE used in the RAM was frozen at 2002-03 levels for undergraduate funding and 2001-02 for most graduate programs. At that time, the Board adopted a guiding principle that, “additional students may be accepted and funded at individual campuses by tuition only, so long as the campuses provide assurances that quality will be maintained.” The 2007 Legislative Assembly instructed OUS via a budget note to “renormalize” the RAM by distributing General Fund through the RAM on the basis of actual fundable student FTE counts by the 2009-2011 biennium. Subsequent discussions over the next two biennia led to partially re-normalizing the RAM up to the most recent level of 57 percent. For the 2011-2013 allocations, cell values will be adjusted to accommodate full re-normalization so that all projected enrollment growth is funded at 100 percent.

2011-12 DISTRIBUTION OF STATE GENERAL FUND
As noted above, OUS uses the RAM to distribute the General Fund to campuses each year. The RAM has two primary components, Enrollment-driven allocations that fund fundable enrollments at each of the campuses (this has typically been 55-65 percent of the total funding); and Targeted Programs that fund regional support, engineering, research, institutes and programs, and central services (typically comprising 35-45 percent of the total funding available). To address recommendations in the 2011-2013 Governor’s Balanced Budget, several modifications will be made to the RAM. Each of these funding components will be discussed more specifically below.

Enrollment-Driven Allocations:
- One-time targeted programs from 2009-2011 will move to enrollment funding: Vet Med, DPSST, reapportionment, and tuition buydown.
- Cell Values will be prioritized to align funding allocation with the Governor’s priorities:
Graduate cell values will be adjusted to the greater of 1) Initial 2011-2013 Upper-division Undergraduate cell values or 2) 50 percent of Initial 2011-2013 cell values.

One-half of the savings from above step will be added to the Lower-and Upper-division Undergraduate cell values.

The other one-half of the savings will be added to targeted graduate cell values: Engineering and Engineering-related Technology; Education; Mathematics; Computer Sciences; Biological Sciences, Life Sciences, Science Technologies, Physical Sciences; Health Professions and related sciences; Veterinary Medicine; and Pharmacy.

After applying the above steps, final cell values that exceed the 2011-2013 Agency Requested Budget Current Service Level (CSL) cell value will be capped at the CSL cell value.

• RAM will be renormalized (both enrollment funding and enrollment-driven targeted programs and Vet. Med.).

• June 2011 enrollment projections for FY2012 and FY2013 will be used to distribute the initial 2011-2013 enrollment funding and funding for enrollment-driven targeted programs.

**Targeted Program Funding:**

- Since the Governor’s Balanced Budget represented an overall reduction from 2009-2011, all targeted programs will be reduced. Targeted programs that correspond with the Governor’s recommendations to 1) prioritize undergraduate education and graduate programs directly related to state workforce goals such as healthcare, engineering, and teacher education and 2) maintain research funding in areas related state economic development goals will be reduced by a smaller percentage than other targeted programs.

**Other Special Allocations:**

- In accordance with the Governor’s Budget, a reserve will be established for regional funding to meet campus financial sustainability requirements as well as achievement of campus-specific board goals; and

- A reserve will be established for initiatives to advance student success goals or to recognize specific campus achievements in student success.

**Enrollment Projections:**

OUS expects overall FTE enrollment to increase by 4 percent in 2011-12 for a total FTE enrollment of 88,029. Fundable FTE enrollment is expected to increase by 1 percent to 66,869 in 2011-12 (see tables 1 and 2). Systemwide and campus enrollment projections are summarized in the following tables.
### Table 1
Projected Fundable FTE Enrollment for 2011-12
By Institution

<table>
<thead>
<tr>
<th>Institution</th>
<th>2010-11</th>
<th>Projected 2011-12</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>EOU</td>
<td>3,160</td>
<td>3,272</td>
<td>3.6%</td>
</tr>
<tr>
<td>OIT</td>
<td>2,379</td>
<td>2,234</td>
<td>-6.1%</td>
</tr>
<tr>
<td>OSU</td>
<td>18,138</td>
<td>18,121</td>
<td>-0.1%</td>
</tr>
<tr>
<td>CASC</td>
<td>408</td>
<td>435</td>
<td>6.6%</td>
</tr>
<tr>
<td>PSU</td>
<td>19,144</td>
<td>19,330</td>
<td>1.0%</td>
</tr>
<tr>
<td>SOU</td>
<td>3,439</td>
<td>3,643</td>
<td>5.9%</td>
</tr>
<tr>
<td>UO</td>
<td>15,231</td>
<td>15,219</td>
<td>-0.1%</td>
</tr>
<tr>
<td>WOU</td>
<td>4,295</td>
<td>4,605</td>
<td>7.2%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>66,194</strong></td>
<td><strong>66,869</strong></td>
<td><strong>1.0%</strong></td>
</tr>
</tbody>
</table>

### Table 2
Projected Fundable FTE Enrollment for 2011-12
By Student Level

<table>
<thead>
<tr>
<th>Level</th>
<th>2010-11</th>
<th>Projected 2011-12</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>UG</td>
<td>52,968</td>
<td>53,710</td>
<td>1.4%</td>
</tr>
<tr>
<td>Master</td>
<td>8,278</td>
<td>7,989</td>
<td>-3.5%</td>
</tr>
<tr>
<td>Doctoral</td>
<td>4,055</td>
<td>4,315</td>
<td>6.4%</td>
</tr>
<tr>
<td>Pharmacy</td>
<td>399</td>
<td>393</td>
<td>-1.5%</td>
</tr>
<tr>
<td>Vet Med</td>
<td>261</td>
<td>260</td>
<td>-0.4%</td>
</tr>
<tr>
<td>Law</td>
<td>233</td>
<td>202</td>
<td>-13.3%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>66,194</strong></td>
<td><strong>66,869</strong></td>
<td><strong>1.0%</strong></td>
</tr>
</tbody>
</table>
Full Board Meeting
Academic Strategies Committee
Committee Action Report
Convened March 31 and April 28, 2011

Actions Taken

• Approved UO, M.A./M.S. in Multimedia Journalism
• Approved UO, Master’s in Nonprofit Management
• Approved Mission Alignment/Metrics
• Endorsed OUS Action/Work Plan for Equity Initiatives
• Approved WOU Preamble, Mission Statement, and Core Themes for Consideration by Full Board

Discussion Only

• Teacher Education
• Faculty Satisfaction and Career Flexibility
• Oregon Audits Division, Faculty Workload

Work in Progress

• Teacher Education
• Research and Economic Development
• OUS Action Plan for Equity Initiatives
Finance & Administration Committee
Committee Action Report
Convened April 8 and May 6, 2011

Actions Taken

- Approved Other Funds Increase for OIT Geothermal Demonstration Project
- Approved Adjustment to 2011-2013 Capital Construction Budget Request for New OSU Classroom Building and Snell Hall Demolition
- Approved UO Request for Additional Other Funds Limitation for Allen Hall Expansion and Remodel
- Approved Additional Other Funds Limitation for UO ISC 2/Lewis Integrative Science Building Project
- Approved WOU Request for Additional/New Other Funds Limitation for Natural Sciences Laboratory Annex in Lieu of Complete Renovation of Todd Hall
- Approved Authorization to Contract with Stacy Witbeck and Mowat Construction for OHSU/OUS Life Sciences Collaborative Complex
- Accepted OUS Fiscal Status of Intercollegiate Athletics Report
- Accepted OUS Internal Audit Charter
- Accepted OUS Quarterly Management Report
- Accepted OUS Report on Investments
- Received OUS Internal Audit Division 2011 Goals and Quarterly Progress Report
- Approved Allocation of Additional Federal Stimulus Funds as Increased by HB5050
- Approved Authorization for Land Transfer to Trimet for Life Sciences Collaborative Complex
- Approved Adjustment to 2011-2013 Capital Budget Request to Include UO Erb Memorial Union and Student Recreation Center Renovation and Expansion

Discussion Only

- OUS Debt Management Strategy
- OUS Risk Management Transition/Consultant

Work in Progress

- 2011-12 Committee Work Plan
- Risk Management Transition Planning
- Legal Services Transition Planning
- 2011-2012 Budget Planning
- MWESB Policy Change
Governance & Policy Committee
Committee Action Report
Convened March 21, April 21, and May 19, 2011

Actions Taken
• Adopted Performance Evaluation Categories for OUS Presidents and Chancellor for Evaluations Conducted in 2011-12 and in Future Years

Discussion Only
• 2011-2013 Legislative Proposals
• University Governance Structures
• Roles of Institutional Boards

Guest Facilitators
• Dr. David Longanecker, President, Western Interstate Commission for Higher Education (April)
• Dr. Aims McGuinness, Senior Associate, National Center for Higher Education Management Systems (April)
• Dr. Pat Callan, President of the National Center for Public Policy and Higher Education (May)

Work in Progress
• Higher Education Finance
Coalition of Communities of Color

SUMMARY
The Coalition of Communities of Color has existed since 2001 and is comprised of culturally-specific community-based organizations representing the following communities: African American, Native American, Latino, Asian/Pacific Islander, Slavic, and African.

The Coalition of Communities of Color, in partnership with researchers at Portland State University, has spent the last two years documenting racial disparities and released (in May 2010) a comprehensive report on the status of racial disparities in Multnomah County across 27 different systems and institutions. The full report is available on the Coalition’s website at www.coalitioncommunitiescolor.org. The Coalition is currently working on six community-specific research reports.

The Coalition will present key findings of its research to the Oregon State Board of Higher Education, focusing on racial and ethnic educational disparities, and offer a set of policy recommendations to reduce these disparities.

PRESENTERS
Dr. Ann Curry-Stevens is the Principle Investigator on the Coalition of Communities of Color community-based participatory research project. She is on faculty in the Portland State University School of Social Work.

Nichole Maher is the co-chair of the Coalition of Communities of Color and Executive Director of the Native American Youth & Family Center.
### OUS Action/Work Plan for Equity Initiatives
As of May 19, 2011 based on input from ASC
*Items in yellow are 2011 priorities for ASC*

<table>
<thead>
<tr>
<th>Item/Activity</th>
<th>Responsible Person/Unit</th>
<th>Detail</th>
<th>Timeline</th>
<th>Status</th>
</tr>
</thead>
</table>
| Measures of equity accountability | • OUS Academic Strategies Division  
• ASC | 1. Vice Chancellor Andrews will collect campus diversity plans.  
2. Dr. Andrews will consult with ASC, provosts, and others to develop a set of proposed measureable outcomes of accountability.  
3. Dr. Andrews will look into various national diversity score cards  
4. Dr. Joe Holiday will work with registrars, enrollment managers, and other groups on the same. | Provosts will supply campus diversity plan by end of June. | Draft list of outcomes developed. They along with score card will be refined this summer by a summer intern. |
<table>
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</thead>
</table>
| Summit                        | • OUS Academic Strategies Division       | 1. Follow up to the summit held in 2009 with the purpose of exchanging best practice ideas/examples and to weigh in on proposed parameters of accountability to track progress for faculty, staff, and student diversity and inclusion.  
2. Drs. Rosemary Powers and Dalton Miller-Jones to provide additional info/advice. | Event to take place in November 2011.                                             |                                    |
| Faculty diversity             | • OUS Academic Strategies Division       | Develop a set of best practices for the recruitment and retention of faculty of color Possible ideas are to have a train the trainer session for OUS department chairs and/or faculty; provide some organized materials of best practices on this topic, work with existing campus personnel | Spring 2011 or Fall 2011 (prior to the start of the faculty recruitment season).  
Create a recruitment resource list for campuses by start of Fall quarter 2011. | Recruitment Resource list in progress                                      |
| Engagement of staff, campuses, and Board with external groups. | • OUS  
• Board  
• Campuses |                                                                                                             |                                                                         |                                    |
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</table>
| Add equity/diversity as an item that is visited with some frequency on the agendas of Presidents Council, Provosts’ Council, ICAR, Board, ASC, etc. | • Chancellor  
• OUS Academic Strategies Division  
• Jim Francesconi  
• Paul Kelly | | Immediately | Provost Council and ASC have added diversity as a regular item |
| Develop a resource list of individuals at OUS institutions that can serve as resources / speakers at other campuses. | • OUS Academic Strategies Division | Select the 2-3 initiatives that we wish to make progress on and put a focus on those | March 2011 | Completed, distributed to institutions, and posted on OUS website at [http://www.ous.edu/about/diversity](http://www.ous.edu/about/diversity) under Resources. |
| Prioritize System-level initiatives. | • OUS Academic Strategies Division | | April 2011 | Initiatives highlighted in yellow |
| Continue with making progress on campus diversity initiatives. | • Presidents  
• OUS Chancellor | Create an inventory of campus initiatives | Ongoing | Governance Committee work in progress |
| Include equity/diversity as a criteria for presidential and Chancellor evaluations. | • Governance Committee | | | |
| Inventory. | • OUS Academic Strategies Division | Create an inventory of campus initiatives | March-June | Campus diversity plans have been requested and will be analyzed at the end of June |
| Included equity/diversity with compact with campuses. | • OUS  
• Board  
• Campuses | | | |
<table>
<thead>
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<th>Timeline</th>
<th>Status</th>
</tr>
</thead>
</table>
| Review Board-, System- and campus-level practices related to equity/diversity (e.g., capital projects). | • All Board Committees  
• OUS  
• Campuses  
• Finance Committee | | | |
| Improve the Board's measureable commitment to equity/diversity. | • Board | | | |
| Diversity of Board. | • Board  
• Governor  
• Governance Committee | | | |
| Revise Board goals to include diversity. | • Board | | | |
| Create greater diversity of Chancellor Office staff. | • Chancellor  
• Vice Chancellors | | | |
Authorization for Land Transfer and Easement

BACKGROUND
At the April 2011 Finance and Administration Committee meeting, PSU presented an update on the OHSU/OUS Life Sciences Collaborative Complex (LSCC), a 263,000 square foot joint development by OHSU and OUS located on the Schnitzer Campus in Portland’s South Waterfront. The update outlined TriMet’s participation in the project, which includes a $10 million payment to OUS to provide certain construction services and construction management for the Portland-Milwaukie Light Rail expansion and integration of light rail stations with the LSCC. The light rail expansion is a key component to the LSCC project, providing match for $10 million in Article XI-G bonds and linking PSU’s existing campus to the LSCC and the South Waterfront.

TriMet Portland-Milwaukie Light Rail Expansion:
The Portland-Milwaukie Light Rail expansion will connect with the existing MAX Green Line at the intersection of SW 5th and SW Lincoln Streets near the PSU’s Art Building and Science and Education Center, and will continue east along SW Lincoln Street past PSU’s University Place Hotel site. To accommodate the project, PSU is requesting to voluntarily transfer two parcels of land on the PSU campus totaling 9,643 square feet to TriMet at no cost. Parcel 1 is comprised of 2,228 square feet of PSU’s Art Building surface parking lot. Parcel 2 consists of a 7,415 square foot sidewalk and parking strip adjacent to Lincoln Street at PSU’s University Place Hotel. The combined appraised value of the two parcels as of February 11, 2011, is $883,550.

In addition to the above voluntary land transfer, TriMet is requesting two temporary construction easements. The first easement is for 495 square feet along the north side of the Art Building surface parking lot. The second easement is for a 13,146 square foot vehicle parking strip that abuts the above parcel and the existing brick fence at University Place Hotel.

PSU has coordinated with the Department of Administrative Services (DAS) to publish the required Notice of Agency Surplus Real Property, which requires agencies interested in the property to provide notice to DAS by May 16, 2011. No responders other than TriMet are expected. To accommodate TriMet’s proposed Federal Transit Authority agreement, transfer of the land needs to take place in late May 2011. TriMet has agreed to reimburse PSU for fees associated with the voluntary land transfer and temporary easements.
Applicable Board Policies:
Board administrative rules governing easements and transfers of interest in Board-owned property are shown below:

580-060-0040
Easements
(1) All instruments granting or acquiring an easement must be executed by the Board President and Board Secretary.

(2) Institution President or designee has the authority to approve acquisition or grant of an easement reasonably related to the operation of the Institution if the consideration does not exceed $1,000,000.

(3) The Institution President or designee must obtain Chancellor, or designee approval for all other easement grants or acquisitions.

Stat. Auth.: ORS 351
Stats. Implemented:
Hist.: OSSHE 5-2008(Temp), f. & cert. ef. 2-19-08 thru 8-16-08; OSSHE 9-2008, f. & cert. ef. 7-21-08

580-060-0050
Transfers of Interests in Real Property
(1) Private Activity Limitations: If an Institution intends to execute any transfer of an interest in real property owned by the Board or the right to use Board real property, including a lease or license, and either (a) the term of the transfer exceeds 50 days in total or (b) the arrangement was not set at fair market value, then prior to the execution of that transfer of interest in real property, the Institution President or designee will confer with the OUS Controller's Division to determine compliance with bond restrictions.

(2) Authority to Execute Agreements: The Institution President or designee is authorized to execute documents transferring such interests for real property owned or controlled by the Board or real property for the use of the Institution if the term of the agreement and all extensions do not exceed ten years or the consideration for the transfer of an interest does not exceed $5 million over the term of the agreement. The Chancellor or designee may approve transfers of interest if the term of the agreement and all extensions do not exceed 15 years or the consideration for the transfer of an interest does not exceed $15 million over the term of the agreement. All other transfers of interests for real property will be approved by the Board.

(3)(a) Improvements to Board-Owned Property: The Institution President or designee will obtain prior approval of the Board for agreements permitting the construction on or renovation to Board-owned property if such improvements exceed $5 million during the term of the agreement. To obtain approval from the Board, the Institution must specify where funding for operations and maintenance will come from.

(b) If the Institution permits construction on or renovation to Board-owned property, the Institution must approve all plans and specifications prior to the commencement of work and obtain record drawings upon termination of the agreement or completion of the work, whichever first occurs.
Stat. Auth.: ORS 351
Stats. Implemented:
Hist.: OSSHE 5-2008(Temp), f. & cert. ef. 2-19-08 thru 8-16-08; OSSHE 9-2008, f. & cert. ef. 7-21-08

COMMITTEE RECOMMENDATION TO THE BOARD
Given the significant benefit to both PSU and the public interest that this light rail connectivity will bring, the Finance and Administration Committee recommends that the Board authorize PSU to enter into agreements with TriMet to perfect the transfer of interest in the described Board-owned real property and granting of construction easements.

(Board action required.)
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WOU, Approval of Preamble, Mission Statement, and Core Themes

BACKGROUND
Western Oregon University examined its Preamble and Mission and created Core Themes as part of the review process necessitated by the new Northwest Commission on Colleges and Universities (NWCCU) accreditation standards. WOU’s leadership committed to holding a series of Campus Conversations open to the campus with two meetings on 3 and 4 June 2010. Following those initial discussions, a University Advisory Council (UAC) was created to vet suggestions that came forward from the Conversations. The UAC is a representative body of administrators, unclassified and classified staff, and faculty. The UAC collated and made comment on suggestions that came forward from the Campus Conversations and made action recommendations to the president’s staff. The UAC worked cooperatively and collaboratively to lead additional Campus Conversations in September and December 2010, which lead to drafts of the Preamble, Mission, and Core Themes. Those were presented at another Conversation in January 2011 for final acceptance. A final Campus Conversation was held in February to share the draft NWCCU “Year One” report including these items.

WOU Preamble
Western Oregon University offers exemplary undergraduate and graduate programs in a supportive and rigorous learning environment. Oregon’s oldest public university, WOU works to ensure the success of students and the advancement of knowledge as a service to Oregon and the region. The University works in partnership with PK-12 schools, community colleges, higher education institutions, government, and local and global communities.

WOU Mission
Western Oregon University is a comprehensive public university, operating for the public good, which:
• Provides effective learning opportunities that prepare students for a fulfilling life in a global society;
• Supports an accessible and diverse campus community; and
• Improves continuously our educational, financial, and environmental sustainability.

Three Core Themes
• Effective Learning
• Supports Diversity
• Sustainable Institution

COMMITTEE RECOMMENDATION TO THE BOARD
The Academic Strategies Committee recommends that the Board approve Western Oregon University’s proposed preamble, mission statement, and core themes as presented.

(Board action required.)
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OUS, Mission Alignment/Metrics

BACKGROUND
The Oregon University System Board, on behalf of OUS, seeks to accomplish four goals to produce the highest level of educational outcomes for Oregonians:

1. Create in Oregon an educated citizenry to support responsible roles in a democratic society and provide a globally competitive workforce to drive the state’s economy, while ensuring access for all qualified Oregonians to quality postsecondary education;
2. Ensure high quality student learning leading to subsequent student success;
3. Create original knowledge and advance innovation; and
4. Contribute positively to the economic, civic, and cultural life of communities in all regions of Oregon.

Both in response to Senate Bill 442 and the goals of the Board, the Oregon University System institutions have defined their missions, student access, academic program array, and research. These efforts are conveyed in the following matrices with accompanying metrics. Individual campuses and the System, as a whole, will use this information to ensure the Board’s goals are met and that resources are effectively managed. The matrices and metrics are designed to first and foremost be used as tools at the campus-level for decision-making related to program development and/or discontinuation.

OVERALL APPROACH FOR DEFINING METRICS
Institutional profiles are defined by three mission alignment matrices:

- Student Access (addressing Goal #1 above). Referencing both physical presence as well as areas of the State from which an institution draws a significant number of students.
- Academic Programs (addressing Goal #2 above). Undergraduate programs only.
- Innovation/Research (addressing Goal #3 above). Reflective of strengths in graduate education and research.

Contributions to the economic, civic, and cultural life in communities (Goal #4) are reflected in all the matrices in that student access, academic programs, and innovation/research are all components that contribute to economic and social vibrancy.

The data in each of these matrices, along with the distinct mission of each institution (also included at the end of this document), provide a picture of the contributions each institution makes to OUS.

INSTITUTIONAL MISSION INTENSITIES AND DEFINING METRICS
Each matrix lists mission aspects in the row categories and the institutions across the columns. The numerical entries in the cells represent the intensity of the commitment each institution has to the mission aspect in that row. A value of 1 implies primary mission intensity for that institution – a commitment to a leadership responsibility in providing coverage for that aspect.
A value of 2 indicates secondary mission intensity – substantial involvement by the institution but not a commitment to leadership of the area. A value of 3 indicates some involvement by that institution in that mission aspect. A blank cell indicates that the institution is not materially involved in that mission aspect. It is important to note that these are institution-declared mission intensities and the numbers should not be misinterpreted to stand for a ranking of programs or a measure of program quality but, rather, the numbers represent a commitment on the part of the university to offer this set of mission aligned programs, but with varying intensity.

Each component of the institution’s mission is multi-faceted and is presented here in terse form. It is also the case that quantitative metrics alone do not capture all the essential relationships among various dimensions of an institution and should be factored in when assessing an institution’s mission.

Each matrix is followed by lists of Systemwide and of Institution-Specific metrics, from which each institution has selected the most valid indicators of fulfilling the mission aspects for which the institution declares primary mission intensity. Note: OHSU is listed in the matrices to demonstrate their contributions to the network of public higher education in the state; however, no metrics are listed for OHSU given their autonomy from OUS.
ALIGNMENT DIMENSION #1: STUDENT ACCESS MISSION INTENSITY

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- **Systemwide Metrics**
  - Enrollment (Unduplicated Headcount): Total and Resident
  - Enrollment from primary geographic areas as percentage of Total Enrollment (Note: Need this to link to the Table 1)
  - Underrepresented Enrollment as percentage of Total Undergraduate Enrollment
  - State Appropriation per Fundable Resident Student FTE (Note: Resident enrollment needs to be linked to State funding to get the full picture)

- **EOU Institution-Specific**
  - Distance Education Enrollment as percentage of Total Enrollment
  - Distance Education Enrollment Oregon County by County as a percentage of Total Enrollment
  - Number of Programs—majors, minors, certificates—available at a distance as a percentage of total number of programs offered
  - New Undergraduate Enrollment: Total, percentage of Resident
  - First-Year Retention Rate for Undergraduate Students (including interinstitutional transfers)
  - Percentage of newly admitted freshmen entering with HS Dual Credit courses
  - Percentage of newly admitted transfers who came from Oregon Community Colleges

- **OIT Institution-Specific**
  - Distance Education Enrollment as percentage of Total Enrollment
  - New Undergraduate Enrollment: Total, percentage of Resident
  - First-Year Retention Rate for Undergraduate Students (including interinstitutional transfers)
• OSU Institution-Specific
  o Enrollment as percentage of Total Enrollment for Nonresident U.S. students, international students, graduate students
  o Distance Education Enrollment as percentage of Total Enrollment
  o First-Year Retention Rate for Undergraduate Students

• PSU Institution-Specific
  o Oregon resident enrollment from Portland Metropolitan Area (PMA)
  o Oregon resident enrollment from outside PMA
  o International student enrollment
  o Domestic Nonresident enrollment
  o Ethnicity
  o Programs offered outside PMA (includes online)
  o Enrollment and degrees awarded by these programs

• SOU Institution-Specific
  o Number of Transfer Students from the Six County Southern Oregon Region
  o Number of Articulation Agreements with Institutions in Oregon
  o Number of First Generation/Low Income students served in Oregon/Southern Oregon

• UO Institution-Specific
  o Average HS GPA and SAT/ACT for New Freshman
  o Percentage of Entering Class (undergraduate and graduate) from Underrepresented Groups and International
  o First- to Second-year Retention
  o Six-year Graduation Rate of undergraduates
  o Percentage of Unmet Financial Need of Resident undergraduates filled from University resources

• WOU Institution-Specific
  o Enrollment as percentage of Total Enrollment for any of the following: First Generation/Low Income students
  o First-year Retention Rate for Undergraduate Students
  o New Undergraduate Enrollment: Total, percentage Resident, percentage Underrepresented, etc.
  o Distance Education Enrollment as percentage of Total Enrollment
### ALIGNMENT DIMENSION #2: ACADEMIC PROGRAM MISSION INTENSITY

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- **Systemwide Metrics**
  - Degrees Awarded: Total, Bachelors, Advanced
  - Degrees Awarded in State-designated Workforce Shortage Areas

- **EOU Institution-Specific Metrics**
  - Degrees Awarded in Education Areas Important to the Institution's Geographic Region (Note: These may be different from State-designated Workforce Shortage Areas)
  - Enrollment of students in the State-designated Workforce Shortage areas expressed as a percentage of Total Enrollment
  - Enrollment of students in program areas leading to programs offered in partnership with other OUS partners and Oregon Community College partners
  - Percentage of Graduates Employed or Enrolled One Year After Graduation

- **OIT Institution-Specific Metrics**
  - Degrees Awarded in Education Areas Important to the Institution’s Geographic Region (Note: These may be different from State-designated Workforce Shortage Areas). Include enrollment of students in the state-designated shortage areas (either by...
Labor Department or Complete College America) expressed as a percentage of Total Enrollment
  o Programmatic Accreditation by DOE-recognized professional accreditation agencies
  o Percentage of Graduates Employed or Enrolled One Year After Graduation

• **OSU Institution-Specific Metrics**
  o Licensure or Certification Pass Rates in Selected Education Areas
  o Programmatic Accreditation by DOE-recognized professional accreditation agencies
  o Six-Year Graduation Rates for Undergraduate Students

• **PSU Institution-Specific Metrics**
  o Enrollment by Declared Major
  o Degrees granted by Major and Level
  o Enrollment in Community-Based Learning
  o Faculty Headcount and FTE by Tenure Status, by Program

• **SOU Institution-Specific Metrics**
  o Degrees Awarded in Education Areas Important to the Southern Oregon Region
    (Business, Education, Environmental Studies, Applied Psychology, Arts)
  o Licensure or Certification Pass rates

• **UO Institution-Specific Metrics**
  o Student/Faculty Ratio
  o Percentage of Students that Study Abroad
  o Percentage of Students involved in Internships, Leadership Programming and Service Learning

• **WOU Institution-Specific Metrics**
  o Degrees Awarded in Education Areas Important to the Institution’s Geographic Region
    (Note: These may be different from State-designated Workforce Shortage Areas)
  o Percentage of Graduates Employed or Enrolled One Year After Graduation
  o Six-Year Graduation Rates for Undergraduate Students
  o Examination of resources dedicated to the Art Programs
### ALIGNMENT DIMENSION #3: INNOVATION/RESEARCH MISSION INTENSITY

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- **Systemwide Metrics**
  - Total Annual Sponsored Grant and Contract Expenditures
  - Graduate Degrees Awarded as percentage of Total Degrees

- **EOU Institution-Specific Metrics**
  - High-Achieving High-School Graduates (GPA>3.75) as percentage of Total First-Year Class
  - Acceptance Rate of Students to selected Professional/Medical/Graduate Programs
  - Number of Graduating Baccalaureate students presenting Senior Research Symposia as a percentage of Overall Baccalaureate Graduates

- **OIT Institution-Specific Metrics**
  - High Achieving High-School Graduates (GPA>3.75) as percentage of Total First-Year Class
  - Number of Patents, Licenses, and Start-ups per Faculty FTE
  - Cumulative Economic Impact per State Appropriation Dollar
  - 

- **OSU Institution-Specific Metrics**
  - Annual Sponsored Grants and Contracts Expenditures per Faculty FTE
  - Number of Patents, Invention Disclosures, and Start-ups, and Licensing Revenue
• High-Achieving High School Graduates (GPA>3.75) as percentage of Total Enrollment

• **PSU Institution-Specific Metrics**
  - Number of Patents/Licenses/Start-ups
  - Number of Partnerships, by agency or organization type
  - Number of state or federal agencies currently supporting Sponsored Research
  - Carnegie Research Classification

• **SOU Institution-Specific Metrics**
  - Number of Students/Clients Served in Community-based Learning and Research Partnerships
  - Number of Clients served through Educational Outreach Collaborations

• **UO Institution-Specific Metrics**
  - Faculty Salaries as percentage of AAU Peers Median
  - Major Faculty Awards (Fulbright, Guggenheim, National Academies...)
  - Average GRE for new graduate students
  - Graduate enrollment
  - Financial Support provided to graduate students
  - Research Expenditures
  - Dollar Return from Patents and Licensing

• **WOU Institution-Specific Metrics**
  - Annual Sponsored Grants and Contracts Expenditures per Faculty FTE
  - Regionally/Nationally Recognized Programs
INSTITIONAL MISSION STATEMENTS

Eastern Oregon University

EOU guides student inquiry through integrated, high-quality liberal arts and professional programs that lead to responsible and reflective action in a diverse and interconnected world.

As an educational, cultural, and scholarly center, EOU connects the rural regions of Oregon to a wider world. Our beautiful setting and small size enhance the personal attention our students receive, while partnerships with colleges, universities, agencies, and communities add to the educational possibilities of our region and state.

EOU Institutional Core Themes & Associated Goals

**Theme 1:** EOU has high quality liberal arts and professional programs that prepare students for the world beyond college.
- **Goal 1:** Foster and assess student learning
- **Goal 2:** Ensure faculty and staff success

**Theme 2:** EOU is a regional University with a deep sense of commitment to students where they are.
- **Goal 3:** Serve students where they are
- **Goal 4:** Make excellence inclusive
- **Goal 5:** Adopt and enhance appropriate educational technologies

**Theme 3:** EOU is the educational, cultural and economic engine of eastern Oregon.
- **Goal 6:** Foster Partnerships
- **Goal 7:** Ensure a fiscally and environmentally sustainable university environment
- **Goal 8:** Provide programs and resources to respond to high demand regional needs

**Theme 4:** EOU provides personal, student-centered experience in both the curricular and co-curricular programs.
- **Goal 9:** Ensure access and success for all students
- **Goal 10:** Provide opportunities for students and faculty to engage with their community
Oregon Institute of Technology

Oregon Institute of Technology, a member of the Oregon University System, offers innovative and rigorous applied degree programs in the areas of engineering, engineering technologies, health technologies, management, and the arts and sciences. To foster student and graduate success, the university provides an intimate, hands-on learning environment, focusing on application of theory to practice. Oregon Tech offers statewide educational opportunities for the emerging needs of Oregon’s citizens and provides information and technical expertise to state, national, and international constituents.

Mission Core Themes
- Applied degree programs
- Student and graduate success
- Statewide educational opportunities
- Public service

Oregon State University

As a land grant institution committed to teaching, research, and outreach and engagement, Oregon State University promotes economic, social, cultural and environmental progress for the people of Oregon, the nation and the world. This mission is achieved by producing graduates competitive in the global economy, supporting a continuous search for new knowledge and solutions, and maintaining a rigorous focus on academic excellence, particularly in the three Signature Areas: Advancing the Science of Sustainable Earth Ecosystems; Improving Human Health and Wellness; and Promoting Economic Growth and Social Progress.

Portland State University

The mission of Portland State University is to enhance the intellectual, social, cultural and economic qualities of urban life by providing access throughout the life span to a quality liberal education for undergraduates and an appropriate array of professional and graduate programs especially relevant to metropolitan areas. The University conducts research and community service that support a high quality educational environment and reflect issues important to the region. It actively promotes the development of a network of educational institutions to serve the community.
Southern Oregon University

*Southern Oregon University is an inclusive campus community dedicated to student success, intellectual growth, and responsible global citizenship.*

- A challenging and practical liberal arts education centered on student learning, accessibility, and civic engagement;
- Academic programs, partnerships, public service, outreach, sustainable practices, and economic development activities that address regional needs such as health and human services, business, and education; and
- Outstanding programs that draw on and enrich our unique arts community and bioregion.

University of Oregon

*The University of Oregon is a comprehensive research university that serves its students and the people of Oregon, the nation, and the world through the creation and transfer of knowledge in the liberal arts, the natural and social sciences, and the professions. It is the Association of American Universities flagship institution of the Oregon University System.*

The University is a community of scholars dedicated to the highest standards of academic inquiry, learning, and service. Recognizing that knowledge is the fundamental wealth of civilization, the University strives to enrich the public that sustains it through

- a commitment to undergraduate education, with a goal of helping the individual learn to question critically, think logically, communicate clearly, act creatively, and live ethically
- a commitment to graduate education to develop creators and innovators who will generate new knowledge and shape experience for the benefit of humanity
- a recognition that research, both basic and applied, is essential to the intellectual health of the University, as well as to the enrichment of the lives of Oregonians, by energizing the state’s economic, cultural, and political structure
- the establishment of a framework for lifelong learning that leads to productive careers and to the enduring joy of inquiry
• the integration of teaching, research, and service as mutually enriching enterprises that together accomplish the University’s mission and support its spirit of community

• the acceptance of the challenge of an evolving social, political, and technological environment by welcoming and guiding change rather than reacting to it

• a dedication to the principles of equality of opportunity and freedom from unfair discrimination for all members of the University community and an acceptance of true diversity as an affirmation of individual identity within a welcoming community

• a commitment to international awareness and understanding, and to the development of a faculty and student body that are capable of participating effectively in a global society

• the conviction that freedom of thought and expression is the bedrock principle on which University activity is based

• the cultivation of an attitude toward citizenship that fosters a caring, supportive atmosphere on campus and the wise exercise of civic responsibilities and individual judgment throughout life

• a continuing commitment to affordable public higher education

Western Oregon University
Western Oregon University offers exemplary undergraduate and graduate programs in a supportive and rigorous learning environment. Oregon’s oldest public university, WOU works to ensure the success of students and the advancement of knowledge as a service to Oregon and the region. The University works in partnership with PK-12 schools, community colleges, higher education institutions, government, and local and global communities.

Western Oregon University is a comprehensive public university, operating for the public good, which:

• Provides effective learning opportunities that prepare students for a fulfilling life in a global society;
• Supports an accessible and diverse campus community; and,
• Improves continuously the educational, financial, and environmental sustainability.

Mission Core Themes
• Effective learning
• Supports diversity
• Sustainable institution
OUS, 2011-12 Proposed Tuition and Fee Rate and Policy Changes, Amendment of OAR 580-040-0040; 2011-12 Academic Year Fee Book

BACKGROUND
The 2010-11 Academic Year Fee Book draft includes proposed tuition and fee changes for the next academic year. The proposed tuition and fee rates have been reviewed by staff to ensure compliance with the Resource Fee and Differential Tuition Policy adopted by the Board in January 2008 relating to the transition of resource fees into tuition and with proposals for new differential tuition rates. Per the policy, all universal and programmatic resource fees were to be rolled into tuition no later than Fall term 2011. Institutions achieved this one year ahead of the targeted completion date, effective with the 2010-11 academic year.

SUMMARY OF CHANGES
The following narrative summarizes proposed tuition and fee changes for 2011-12, focusing on resident tuition and fees. Campuses were asked to submit additional information for any new differential tuition rates in accordance with the Differential Tuition Policy (Appendix B, page 31). Changes to existing differential rates are noted if proposed differential rates exceed proposed base rate increases.

EOU – Eastern Oregon University proposes an increase of 5.5 percent in the per-credit hour rate for resident and nonresident undergraduate tuition and is removing the tuition plateau for credits in excess of 10. Removal of the plateau results in incremental increases depending upon credit level – for example 5.8 percent at the 12 credit hour level, 6.8 percent at the 15 credit hour level. Graduate per credit hour tuition increases by 4.0 percent; the Master of Arts in Teaching (MAT) tuition increases 2.9 percent. EOU is instituting a separate tuition rate for international students beginning Academic Year (AY) 2011-12 that is three times the resident rate for each classification – undergraduate, graduate, and MAT. International students admitted prior to Fall 2011 are exempted from international tuition rates.

Incidental fees are $5 per term higher due to increased costs and Health Service Fees are increasing $11 per term based on the student health insurance premium increase.

OIT – Oregon Institute of Technology proposes increasing resident undergraduate tuition by 9 percent and resident graduate tuition by 9.1 percent

OIT is proposing a change to the Part-Time Fee Policy (Appendix B, page 17), adjusting the maximum credit level from 8 credits to 6 credits that nonresident students are assessed resident tuition rates. OIT also has submitted fee schedules which reflect this change. The intent is to gradually phase out this policy for OIT with minimal impact to current students.

Incidental fees will increase a maximum of $15 (7.9 percent) per term depending on credit level. No increases were proposed for existing differential programs. The Health Service Fee, which includes a component for basic health insurance, is increasing $19 per term.
OSU – Oregon State University is proposing to increase resident undergraduate tuition by 8.1 percent and resident graduate tuition by 4.4 percent. Due to high demand and high cost, OSU has added new undergraduate differential rates for Forestry and Design & Human Environment, and a new graduate differential rate for the Professional Science Masters (PSM) program. Incremental increases for these new differentials are 3.1 to 3.9 percent for undergraduate programs and 7.2 to 10.8 percent for PSM.

As approved by ASOSU Congress, OSU is raising Incidental fees $52.78 per term primarily due to new and expanded student services. Health Service Fees are increasing by 0.8 percent.

The OSU-Cascades Campus is proposing to increase resident undergraduate tuition by 5.8 percent and resident graduate tuition by 4.4 percent. Incidental Fees for the Cascades Campus will increase by $5 to account for additional student programs.

PSU – Portland State University is proposing to increase its resident undergraduate tuition rate by 9 percent and resident graduate tuition up to 6 percent. Undergraduate Fine and Performing Arts differential rates would increase an incremental 3.4 percent and graduate Engineering and Computer Science differential rates would increase an incremental 1.1 to 1.2 percent.

Health Service Fees are proposed to increase $40 (21.1 percent). The change is due to increases in health insurance premiums and increased costs for operations as well as new services. Incidental Fees are increasing with approval from the Student Fee Committee by 1 percent. The Matriculation Fee for undergraduate students will increase $15 (5 percent) from 2010-11. The increase is proposed to cover increased recruiting, orientation, and matriculation expenses and aligns with similar fees for OSU and UO.

SOU – Southern Oregon University proposes tuition increases for resident undergraduate of 6.8 percent. Resident undergraduate rates were brought in line with Summer 2011 rates. SOU proposes to simplify their tuition structure by 1) eliminating their optional Part-Time Fee Policy (0 percent increase to per credit hour rate, but increases for nonresident enrollment at the 1-8 credit hour level) and 2) utilizing a consistent per credit hour rate at the graduate level instead of the previous structure that assessed a single per credit hour rate for 1-9 credits hours and another rate for 10 or more credit hours. Resident graduate tuition increases 0 percent for 1-9 credit hours with incrementally higher increases for 10 or more credit hours, while nonresident graduates have higher increases at the 1-8 credit hour levels.

Commensurate with Student Fee Committee recommendation, SOU will increase Incidental Fees $7 per term. This increase is to support student initiatives and the addition of a mental health and drug and alcohol counseling services. Health Service Fees are increasing $13 (7.9 percent) per term to account for increases in insurance premiums.

SOU is eliminating the differential rate for their Masters Mental Health Counseling and elected to charge students in that program the base tuition and fee rates. SOU is adding a new differential rate for their Masters in Education program but, due to market considerations of
pricing and demand, the tuition per credit hour for this program will be lower than SOU’s base graduate rates.

**UO** – The University of Oregon is proposing up to a 9 percent increase to resident undergraduate tuition and a 6.9 percent increase to resident graduate tuition. The UO is proposing to implement a new graduate differential tuition schedule for the Strategic Communication Master’s program in the School of Journalism and Communication that would be an incremental increase of 3.1 percent. Journalism students were previously charged programmatic resource fees. Graduate differential programs with incremental increases: MBA–3.1 percent; Law, LLM, and Conflict and Resolution– 2.1 percent.

The UO is decreasing Incidental Fees by 6.8 percent while increasing Health Service Fees and Recreation Center fees by $3.75 (2.7 percent) and $2 (4.6 percent), respectively.

The UO is proposing an increase to their Matriculation fee of $27 (9 percent).

The UO is also proposing two new mandatory fees, to support the expansion of the Erb Memorial Student Union Building (EMU) and the renovation of Student Recreation Center (SRC). The fees as proposed are: Student Union Fee - $18, Recreation Center Expansion Fee - $12. These would represent early fee contributions to the projects – fees assessed to students who would not have use of the facility improvements. Planning information discussed at the May 6, 2011, meeting of the Finance and Administration Committee indicated a three-year collection period that would begin with a Fall 2011 $30 assessment (EMU and SRC combined), increasing to $60 Fall 2012, and to $100 Fall 2014. Project completion and availability for student use is scheduled for Fall 2014 for the SRC and Fall 2015 for the EMU. The UO is in the process of developing options to provide value to students who will pay the early fee, such as discounted memberships post-graduation. The UO has provided additional information (following the draft fee book) in the form of project scope research and a history of early fee collections for prior student facility projects.

**WOU** – Western Oregon University is eliminating schedules for the non-Promise, resident undergraduate students. All resident WOU students will now fall under one of the Western Promise Fee Schedules. For the new cohort of Promise 2011, WOU proposes to increase rates 5.1 percent over 2010 rates. Graduate resident tuition will increase by 4.4 percent.

With student approval, WOU is proposing to increase its Incidental Fee by $14 for AY 2011-12. Health Service Fees are increasing by 11.3 percent, which include a 3.6 percent increase to campus health services and a 19.5 percent increase due to student health insurance premium increases. Per Student Senate support and a student referendum vote, WOU is proposing a $7 increase to the Recreation Center Building Fee.

WOU proposes a $32 (15.6 percent) increase to its one-time Matriculation Fee for all new and transfer students. The proposed increase is to account for increased expenses in providing existing and new expanded services for SOAR and New Student Week.
2010-11 TUITION AND FEE

The following tables illustrate proposed changes in rates at the 6, 9, 12, and 15 credit hour levels. The attached 2011-12 Academic Year Fee Book draft contains tuition and fee proposals submitted by each OUS institution. The tuition and fee proposals submitted by each institution are carefully reviewed by Chancellor’s Office staff to ensure that the proposals conform to Board policy, meet legislative expectations, and comply with related statutes.

UNDERGRADUATE TUITION AND FEE CHANGES OVER PRIOR YEAR
Tables 1 through 4, below, compare undergraduate tuition and fees for the 2011-12 academic year with 2010-11 rates at 6, 9, 12, and 15 credit hours for resident and nonresident students.

<table>
<thead>
<tr>
<th>Proposed Rate Increases for Resident Undergraduate Base Tuition</th>
<th>At representative credit hour levels</th>
</tr>
</thead>
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<tr>
<td></td>
<td>6</td>
</tr>
<tr>
<td>EOU</td>
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<td>OIT</td>
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</tr>
<tr>
<td>OSU</td>
<td>8.1%</td>
</tr>
<tr>
<td>OSU-CC</td>
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</tr>
<tr>
<td>PSU</td>
<td>9.0%</td>
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<tr>
<td>SOU</td>
<td>6.8%</td>
</tr>
<tr>
<td>UO</td>
<td>9.0%</td>
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<tr>
<td>WOU</td>
<td>5.1%</td>
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<tr>
<td>Average</td>
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</table>

* EOU is removing tuition plateau for credits in excess of 10
### Table 1

**2011-12 Base Tuition and Fees Per Term**

**Undergraduate - 6 Credit Hours**

<table>
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<tr>
<th></th>
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<td>$750.00</td>
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#### Mandatory and Resource Fees

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<th>Cascades</th>
<th>PSU</th>
<th>SOU</th>
<th>UO</th>
<th>WOU</th>
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<td>33.00</td>
<td>33.00</td>
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<td>33.00</td>
<td>33.00</td>
<td>33.00</td>
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<td>127.00</td>
<td>205.00</td>
<td>178.00</td>
<td>160.00</td>
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<td>202.00</td>
<td>135.76</td>
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<td>Recreation Center</td>
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<td>205.00</td>
<td>178.00</td>
<td>160.00</td>
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<td>Student Union Fee</td>
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<tr>
<td>Rec Center Expansion</td>
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### Total Tuition and Fees

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<th>Cascades</th>
<th>PSU</th>
<th>SOU</th>
<th>UO</th>
<th>WOU</th>
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### Percentage Increase over Prior Year

<table>
<thead>
<tr>
<th></th>
<th>EOU</th>
<th>OIT</th>
<th>OSU</th>
<th>Cascades</th>
<th>PSU</th>
<th>SOU</th>
<th>UO</th>
<th>WOU</th>
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</thead>
<tbody>
<tr>
<td>Residents</td>
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<td>9.0%</td>
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<tr>
<td>Nonresidents</td>
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<td></td>
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#### Mandatory Fees

<table>
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<tr>
<th></th>
<th>EOU</th>
<th>OIT</th>
<th>OSU</th>
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<td>0.0%</td>
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<tr>
<td>Incidental</td>
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<td>Student Union Fee</td>
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</tr>
<tr>
<td>Rec Center Expansion</td>
<td>New</td>
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<tr>
<td>Total Tuition and Fees</td>
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<td>9.6%</td>
<td>5.8%</td>
<td>7.8%</td>
<td>6.2%</td>
</tr>
</tbody>
</table>

### Endnotes:


[2] Commensurate with student recommendations, OIT increased incidental fees 7.9%.

[3] Commensurate with student recommendations, OSU-Cononlis increased all incidental fees by $52.78.

[4] Commensurate with student recommendations, OSU - Cascades increased all incidental fees $5.00.

[5] Commensurate with approval by Student Fee Committee - PSU increased student incidental fees $2.00.

[6] SOU eliminated their optional Part-time policy which assessed nonresidents taking fewer than 9 hours at resident rates. The effect of the changes for Non-Resident Undergraduate students results in an unusually higher increase for 8 credits and below but no increase for 8 credits and above. Resident Undergraduate rates were brought in-line with Summer rates.

[7] UO added two new mandatory fees beginning 2011-12. These include: 1) the Student Union Fee which will be implemented over a 3 year period and supports the renovation of the Erb Memorial Union Building and 2) the Rec Center Expansion Fee for the 2014 renovation of the UO Recreation Center. UO student government also approved a 6.8% decrease in Incidental Fees with student representatives supporting a $2 increase in Rec Center Fees.
### Table 2

#### 2011-12 Base Tuition and Fees Per Term

**Undergraduate - 9 Credit Hours**

<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td>Residents</td>
<td>$1,120.50</td>
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<td>$1,557.00</td>
<td>$1,476.00</td>
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<td>Nonresidents</td>
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</table>

#### Mandatory and Resource Fees

| Building                         | 39.00   | 39.00   | 39.00   | 39.00       | 39.00   | 39.00   | 39.00   | 39.00   |
| Incidental                       | 245.00  | 185.00  | 309.71  | 125.00      | 174.00  | 307.00  | 178.00  | 144.50  |
| Health                           | 191.00  | 202.00  | 135.76  |             | 230.00  | 178.00  |         | 178.00  |
| Recreation Center                | 41.00   |         |         |             |         |         | 45.25   | 42.00   |
| Student Union Fee                |         |         |         |             |         |         | 18.00   |         |
| Rec Center Expansion             |         |         |         |             |         |         | 12.00   |         |
| **Total Fees**                   | $475.00 | $436.00 | $484.47 | $164.00     | $484.00 | $524.00 | $436.75 | $478.00 |

#### Total Tuition and Fees

| Residents                        | $1,595.50 | $1,711.30 | $2,041.47 | $1,640.00 | $1,715.20 | $1,649.00 | $1,945.75 | $1,770.00 |
| Nonresidents                     | $1,595.50 | $4,576.00 | $5,470.47 | $5,150.00 | $4,759.00 | $4,304.00 | $5,719.75 | $4,150.00 |
| International                    | $3,836.50 |         |         |             |         |         |         |         |

#### Percentage Increase over Prior Year

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<td>5.1%</td>
</tr>
<tr>
<td>Nonresidents</td>
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<td>4.5%</td>
<td>6.0%</td>
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</tr>
<tr>
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</table>

#### Percentage Increase over Prior Year

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<td>5.5%</td>
<td>9.1%</td>
<td>5.9%</td>
<td>8.1%</td>
<td>5.9%</td>
</tr>
<tr>
<td>Nonresidents</td>
<td>4.9%</td>
<td>8.9%</td>
<td>5.2%</td>
<td>4.5%</td>
<td>6.4%</td>
<td>0.5%</td>
<td>7.4%</td>
<td>5.0%</td>
</tr>
<tr>
<td>International</td>
<td>New</td>
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</tr>
</tbody>
</table>

#### Endnotes:

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*Percent change in Incidental fees may vary by credit level as some institutions utilize graduated, step based algorithms to determine fee charges.*
### Table 3

#### 2011-12 Base Tuition and Fees Per Term

**Undergraduate - 12 Credit Hours**

<table>
<thead>
<tr>
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<td>$2,076.00</td>
<td>$1,968.00</td>
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<td>$1,500.00</td>
<td>$2,013.00</td>
<td>$1,721.00</td>
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<td>Nonresidents</td>
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<td>$6,648.00</td>
<td>$5,700.00</td>
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</table>

#### Mandatory and Resource Fees

<table>
<thead>
<tr>
<th></th>
<th>Building</th>
<th>Incidental</th>
<th>Health</th>
<th>Recreation Center</th>
<th>Student Union Fee</th>
<th>Rec Center Expansion</th>
<th>Total Fees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residents</td>
<td>45.00</td>
<td>245.00</td>
<td>191.00</td>
<td>41.00</td>
<td>18.00</td>
<td>12.00</td>
<td>$481.00</td>
</tr>
<tr>
<td>Nonresidents</td>
<td>45.00</td>
<td>257.00</td>
<td>202.00</td>
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<td></td>
<td></td>
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<td>45.00</td>
<td>324.71</td>
<td>135.76</td>
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#### Total Tuition and Fees

<table>
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<tr>
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<td>$2,204.40</td>
<td>$4,963.00</td>
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<tr>
<td>Nonresidents</td>
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<td>$6,024.00</td>
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<tr>
<td>International</td>
<td>$4,963.00</td>
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#### Percentage Increase over Prior Year

<table>
<thead>
<tr>
<th>Tuition &amp; Rolled-in Resource Fees</th>
<th>EOU</th>
<th>OIT</th>
<th>OSU</th>
<th>Cascades</th>
<th>PSU</th>
<th>SOU</th>
<th>UO</th>
<th>WOU</th>
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</thead>
<tbody>
<tr>
<td>Residents</td>
<td>5.8%</td>
<td>9.0%</td>
<td>8.1%</td>
<td>5.8%</td>
<td>9.0%</td>
<td>6.8%</td>
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<tr>
<td>Nonresidents</td>
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<td>9.0%</td>
<td>4.5%</td>
<td>4.5%</td>
<td>6.0%</td>
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<td>4.6%</td>
</tr>
<tr>
<td>International</td>
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</tr>
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</table>

#### Mandatory Fees

<table>
<thead>
<tr>
<th></th>
<th>Building</th>
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<th>Health</th>
<th>Recreation Center</th>
<th>Student Union Fee</th>
<th>Rec Center Expansion</th>
<th>Total Fees</th>
</tr>
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<tr>
<td>Residents</td>
<td>0.0%</td>
<td>2.1%</td>
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<tr>
<td>Nonresidents</td>
<td>0.0%</td>
<td>6.2%</td>
<td>10.4%</td>
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<td>0.0%</td>
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<td>New</td>
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<tr>
<td>International</td>
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<td>4.5%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
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#### Total Tuition and Fees

<table>
<thead>
<tr>
<th></th>
<th>Residents</th>
<th>Nonresidents</th>
<th>International</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residents</td>
<td>5.2%</td>
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<td>8.8%</td>
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<tr>
<td>Nonresidents</td>
<td>5.2%</td>
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</tr>
<tr>
<td>International</td>
<td>5.2%</td>
<td>8.9%</td>
<td></td>
</tr>
</tbody>
</table>

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**Endnotes:**


[2] Commensurate with student recommendations, OIT increased incidental fees 7.9%.

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### Table 4
2011-12 Base Tuition and Fees Per Term
Undergraduate - 15 Credit Hours

<table>
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<tr>
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<tbody>
<tr>
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<td>$2,076.00</td>
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<td>$1,875.00</td>
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### Mandatory and Resource Fees

<table>
<thead>
<tr>
<th>Mandatory Fees</th>
<th>Building</th>
<th>Incidental</th>
<th>Health</th>
<th>Recreation Center</th>
<th>Student Union Fee</th>
<th>Rec Center Expansion</th>
<th>Total Fees</th>
<th>Total Tuition and Fees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residents</td>
<td>45.00</td>
<td>245.00</td>
<td>191.00</td>
<td>41.00</td>
<td>18.00</td>
<td>12.00</td>
<td>$481.00</td>
<td>$2,348.50</td>
</tr>
<tr>
<td>Nonresidents</td>
<td>45.00</td>
<td>257.00</td>
<td>202.00</td>
<td>45.00</td>
<td>18.00</td>
<td></td>
<td>$504.00</td>
<td>$2,629.50</td>
</tr>
<tr>
<td>International</td>
<td>45.00</td>
<td>324.71</td>
<td>135.76</td>
<td>45.00</td>
<td>18.00</td>
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<tr>
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<td>$1,875.00</td>
<td>$2,517.00</td>
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<tr>
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### Percentage Increase over Prior Year

<table>
<thead>
<tr>
<th>Tuition &amp; Rolled-in Resource Fees</th>
<th>EOU</th>
<th>OIT</th>
<th>OSU</th>
<th>Cascades</th>
<th>PSU</th>
<th>SOU</th>
<th>UO</th>
<th>WOU</th>
</tr>
</thead>
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<tr>
<td>Residents</td>
<td>6.8%</td>
<td>9.0%</td>
<td>8.1%</td>
<td>5.8%</td>
<td>9.0%</td>
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<td>Nonresidents</td>
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<td>9.0%</td>
<td>4.5%</td>
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### Mandatory Fees

<table>
<thead>
<tr>
<th>Mandatory Fees</th>
<th>Building</th>
<th>Incidental</th>
<th>Health</th>
<th>Recreation Center</th>
<th>Student Union Fee</th>
<th>Rec Center Expansion</th>
<th>Total Fees</th>
<th>Total Tuition and Fees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residents</td>
<td>0.0%</td>
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<td>6.1%</td>
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<td>$2,348.50</td>
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<tr>
<td>Nonresidents</td>
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<td>0.0%</td>
<td>0.0%</td>
<td>$504.00</td>
<td>$2,629.50</td>
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<td>$536.00</td>
</tr>
<tr>
<td>Nonresidents</td>
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<td>7.9%</td>
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<td>0.0%</td>
<td>0.0%</td>
<td>$442.75</td>
<td>$442.75</td>
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</table>

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GRADUATE TUITION AND FEE CHANGES OVER PRIOR YEAR
Tables 5 through 8, below, compare graduate tuition and fees for the 2011-12 academic year with 2010-11 resident and nonresident rates at 6, 9, 12, and 15 credit hours.

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<tr>
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<th></th>
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<td>$2,418.00</td>
<td>$2,418.00</td>
<td>$2,004.00</td>
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<td>$2,880.00</td>
<td>$1,842.00</td>
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<tr>
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<td>$1,560.00</td>
<td>$1,944.00</td>
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<td>$3,888.00</td>
<td>$3,132.00</td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

Mandatory and Resource Fees

| Building                         | $33.00 | $33.00 | $38.00 | $38.00 | $33.00 | $33.00 | $37.00 | $33.00 |
| Incidental                       | $245.00 | $164.00 | $306.71 | $125.00 | $159.00 | $205.00 | $178.00 | $160.00 |
| Health                           | $191.00 | $202.00 | $135.76 |          | $230.00 | $178.00 | $144.50 | $178.00 |
| Recreation Center                | $41.00 | $45.25 | $42.00 |          |        |        |       |       |
| Student Union Fee                |        |        |        |          | $18.00 |        |       |       |
| Rec Center Expansion             |        |        |        |          |        | $12.00 |       |       |
| Total Fees                       | $469.00 | $399.00 | $480.47 | $163.00 | $463.00 | $416.00 | $434.75 | $413.00 |

Total Tuition and Fees

| Residents                        | $2,029.00 | $2,343.00 | $2,898.47 | $2,581.00 | $2,467.00 | $2,516.00 | $3,314.75 | $2,255.00 |
| Nonresidents                     | $2,029.00 | $2,343.00 | $4,368.47 | $4,051.00 | $3,595.00 | $3,116.00 | $4,736.75 | $3,443.00 |
| International                    | $5,149.00 |          |          |            |        |        |       |       |

Percentage Increase over Prior Year

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Residents</td>
<td>4.0%</td>
<td>9.1%</td>
<td>4.4%</td>
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<td>0.0%</td>
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<tr>
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</tr>
</tbody>
</table>

Mandatory Fees

| Building                         | 0.0%   | 0.0%   | 0.0%   | 0.0%       | 0.0%   | 0.0%   | 0.0%  | 0.0%  |
| Incidental                       | 2.1%   | 7.9%   | 20.8%  | 4.2%       | 1.3%   | 1.5%   | -6.8% | 4.6%  |
| Health                           | 6.1%   | 10.4%  | 0.8%   | 0.0%       | 21.1%  | 7.9%   | 2.7%  | 11.3% |
| Recreation Center                | 0.0%   | 0.0%   | 0.0%   | 0.0%       | 0.0%   | 0.0%   | 4.6%  | 20.0% |
| Student Union Fee                | New    |        |        |            |        |        |       |       |
| Rec Center Expansion             | New    |        |        |            |        |        |       |       |

Total Tuition and Fees

| Residents                        | 3.9%   | 9.0%   | 5.7%   | 4.3%       | 6.8%   | 0.6%   | 6.7%  | 5.1%  |
| Nonresidents                     | 3.9%   | 9.0%   | 5.3%   | 4.5%       | 6.6%   | 24.6%  | 6.9%  | 5.0%  |
| International                    | New    |        |        |            |        |        |       |       |

Endnotes:

[2] Commensurate with student recommendations, OIT increased incidental fees 7.9%.
[3] Commensurate with student recommendations, OSU-Corvallis increased all incidental fees by $52.78.
[4] Commensurate with student recommendations, OSU - Cascades increased all incidental fees $5.00.
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*Percent change in Incidental fees may vary by credit level as some institutions utilize graduated, step based algorithms to determine fee charges.
## Table 6
### 2011-12 Base Tuition and Fees Per Term
#### Graduate - 9 Credit Hours

<table>
<thead>
<tr>
<th>Tuition &amp; Rolled-in Resource Fees</th>
<th>OSU</th>
<th>EOU(^{[1]})</th>
<th>OIT(^{[2]})</th>
<th>OSU(^{[3]})</th>
<th>Cascades(^{[4]})</th>
<th>PSU(^{[5]})</th>
<th>SOU(^{[6]})</th>
<th>UO(^{[7]})</th>
<th>WOU(^{[8]})</th>
</tr>
</thead>
<tbody>
<tr>
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<td>$2,340.00</td>
<td>$2,916.00</td>
<td>$3,627.00</td>
<td>$3,627.00</td>
<td>$3,006.00</td>
<td>$3,150.00</td>
<td>$4,320.00</td>
<td>$4,545.00</td>
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<tr>
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<td>$5,832.00</td>
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<td>$4,698.00</td>
<td>$4,050.00</td>
<td>$6,453.00</td>
<td>$4,545.00</td>
<td>$2,763.00</td>
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<td>International</td>
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**Mandatory and Resource Fees**

<table>
<thead>
<tr>
<th></th>
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<th>Incidental</th>
<th>Health</th>
<th>Recreation Center</th>
<th>Student Union Fee</th>
<th>Rec Center Expansion</th>
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</thead>
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<tr>
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<td>324.71</td>
<td>220.00</td>
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<td>135.76</td>
<td>230.00</td>
<td>178.00</td>
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</tbody>
</table>

**Total Fees**

|                             | $475.00  | $436.00    | $505.47 | $185.00           | $536.00            | $524.00           | $442.75    | $542.00    |

**Total Tuition and Fees**

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### Percentage Increase over Prior Year

<table>
<thead>
<tr>
<th>Tuition &amp; Rolled-in Resource Fees</th>
<th>OSU</th>
<th>EOU</th>
<th>OIT</th>
<th>OSU</th>
<th>Cascades</th>
<th>PSU</th>
<th>SOU</th>
<th>UO</th>
<th>WOU</th>
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</thead>
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<td>6.0%</td>
<td>0.0%</td>
<td>-19.0%</td>
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<td>4.4%</td>
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<tr>
<td>Nonresidents</td>
<td>4.0%</td>
<td>9.1%</td>
<td>4.5%</td>
<td>4.5%</td>
<td>6.1%</td>
<td>-0.0%</td>
<td>4.6%</td>
<td>20.0%</td>
<td>4.6%</td>
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<tr>
<td>International</td>
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<td></td>
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</tbody>
</table>

### Endnotes:


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*Percent change in incidental fees may vary by credit level as some institutions utilize graduated, step based algorithms to determine fee charges.*
### 2011-12 Base Tuition and Fees Per Term

#### Graduate - 12 Credit Hours

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</table>

#### Mandatory and Resource Fees

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<td>45.00</td>
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<tr>
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<td>307.00</td>
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#### Total Tuition and Fees

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<td>Residents</td>
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### Percentage Increase over Prior Year

<table>
<thead>
<tr>
<th>Tuition &amp; Rolled-in Resource Fees</th>
<th>EOU</th>
<th>OIT</th>
<th>OSU</th>
<th>Cascades</th>
<th>PSU</th>
<th>SOU</th>
<th>UO</th>
<th>WOU</th>
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</thead>
<tbody>
<tr>
<td>Residents</td>
<td>4.1%</td>
<td>9.1%</td>
<td>4.4%</td>
<td>4.4%</td>
<td>6.0%</td>
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<td>6.9%</td>
<td>4.4%</td>
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<tr>
<td>Nonresidents</td>
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<td>4.5%</td>
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### Mandatory Fees

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</thead>
<tbody>
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<tr>
<td>Incidental</td>
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</tr>
<tr>
<td>Rec Center Expansion</td>
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<tr>
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<td></td>
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</tr>
</tbody>
</table>

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## Table 8
### 2011-12 Base Tuition and Fees Per Term

**Graduate - 15 Credit Hours**

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### Mandatory and Resource Fees

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<td></td>
</tr>
<tr>
<td>Incidental</td>
<td>$245.00</td>
<td>$257.00</td>
<td>$324.71</td>
<td>$140.00</td>
<td>$220.00</td>
<td>$307.00</td>
<td>$178.00</td>
</tr>
<tr>
<td>Health</td>
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<td>$202.00</td>
<td>$135.76</td>
<td>$230.00</td>
<td>$178.00</td>
<td>$144.50</td>
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<td>Recreation Center</td>
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<td>$18.00</td>
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<td>$536.00</td>
<td>$530.00</td>
<td>$442.75</td>
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### Total Tuition and Fees

<p>| | | | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Residents</td>
<td>$4,381.00</td>
<td>$5,364.00</td>
<td>$4,132.47</td>
<td>$5,186.00</td>
<td>$5,780.00</td>
<td>$4,762.75</td>
<td>$5,147.00</td>
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<td>Nonresidents</td>
<td>$4,381.00</td>
<td>$9,144.00</td>
<td>$6,337.47</td>
<td>$8,333.00</td>
<td>$7,280.00</td>
<td>$6,895.75</td>
<td>$8,117.00</td>
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<tr>
<td>International</td>
<td>$12,181.00</td>
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</table>

### Percentage Increase over Prior Year

<table>
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<tr>
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</thead>
<tbody>
<tr>
<td>Residents</td>
<td>4.6%</td>
<td>9.1%</td>
<td>4.4%</td>
<td>4.4%</td>
<td>6.0%</td>
<td>32.6%</td>
<td>6.9%</td>
<td>4.4%</td>
</tr>
<tr>
<td>Nonresidents</td>
<td>4.6%</td>
<td>9.1%</td>
<td>4.5%</td>
<td>4.5%</td>
<td>6.1%</td>
<td>1.5%</td>
<td>7.0%</td>
<td>4.6%</td>
</tr>
<tr>
<td>International</td>
<td>New</td>
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### Mandatory Fees

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<tr>
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</thead>
<tbody>
<tr>
<td>Building</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Incidental</td>
<td>2.1%</td>
<td>6.2%</td>
<td>19.4%</td>
<td>3.7%</td>
<td>0.9%</td>
<td>2.3%</td>
<td>-8.6%</td>
</tr>
<tr>
<td>Health</td>
<td>6.1%</td>
<td>10.4%</td>
<td>0.8%</td>
<td>0.0%</td>
<td>21.1%</td>
<td>7.9%</td>
<td>2.7%</td>
</tr>
<tr>
<td>Recreation Center</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>4.6%</td>
</tr>
<tr>
<td>Student Union Fee</td>
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<td></td>
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</tr>
<tr>
<td>Rec Center Expansion</td>
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</tr>
</tbody>
</table>

### Total Tuition and Fees

<p>| | | | | | | | |</p>
<table>
<thead>
<tr>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Residents</td>
<td>4.5%</td>
<td>8.9%</td>
<td>5.3%</td>
<td>4.3%</td>
<td>6.3%</td>
<td>29.3%</td>
<td>6.8%</td>
</tr>
<tr>
<td>Nonresidents</td>
<td>4.5%</td>
<td>9.0%</td>
<td>5.1%</td>
<td>4.5%</td>
<td>6.2%</td>
<td>1.7%</td>
<td>6.9%</td>
</tr>
<tr>
<td>International</td>
<td>New</td>
<td></td>
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<td></td>
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<td></td>
</tr>
</tbody>
</table>

### Endnotes:


[2] Commensurate with student recommendations, OIT increased incidental fees 7.9%.

[3] Commensurate with student recommendations, OSU-Corvallis increased all incidental fees by $52.78.

[4] Commensurate with student recommendations, OSU - Cascades increased all incidental fees $5.00.

[5] Commensurate with approval by Student Fee Committee - PSU increased student incidental fees $2.00.

[6] SOU simplified their tuition structure for 2011-12 by moving from a stepped based tuition structure to a standard rate per credit hour for all Graduate students. The effect of the changes for Resident Graduate students results in a range of higher increases for 10 credits and above but no increase for 9 credits and below. Implementing the standard rate per credit hour for Non-Resident Graduate students results in an unusually higher increase for 8 credits and below, decreases for 9 - 14 credits and then increasing incrementally for 15 or more credit hours.

[7] UO added two new mandatory fees beginning 2011-12. These include: 1) the Student Union Fee which will be implemented over a 3 year period and supports the renovation of the Erb Memorial Union Building and 2) the Rec Center Expansion Fee for the 2014 renovation of the UO Recreation Center. UO student government also approved a 6.8% decrease in Incidental Fees with student representatives supporting a $2 increase in Rec Center Fees.

[8] WOU student health insurance premium increased by 19.5%. Health insurance is 51.7% of the total Health Fee. Western opened the Student Recreation Center in Spring Term 2011 and increased the Recreation Center and Incidental fees concurrent with that opening. Comparison data for these two categories is based on the 2010-2011 Winter/Spring Term Rates for WOU. Commensurate with student recommendations, WOU increased incidental fees $14/term and approved a Rec Center Fee increase of $7/term.

*Percent change in Incidental fees may vary by credit level as some institutions utilize graduated, step based algorithms to determine fee charges.*
RESIDENCE HALL AND FOOD SERVICE FEE CHANGES OVER PRIOR YEAR

Table 9, shown below, provides a cross-section of 2011-12 room and board rates. Residence halls are self-supporting auxiliary enterprises that furnish essential services to students and authorized persons attending educational activities supported by the institution. In addition to living quarters and meal service, residence halls provide counseling, advising, and social and recreational programs that augment the instructional programs. Rates are established to cover the cost of the service, including the proportionate share of the debt service associated with the residence hall and food service activities at the respective institutions.

Table 9
2011-12 Academic Year Room and Board Comparisons

<table>
<thead>
<tr>
<th>Sample Academic Housing Rates per Term</th>
<th>2011-12</th>
<th>2010-11</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EOU</strong> Academic Year - Alikut Suites (includes meal Plan A)</td>
<td>$8,100</td>
<td>$7,825</td>
<td>3.5%</td>
</tr>
<tr>
<td><strong>OIT</strong> Academic Year - Multiple A (includes meal Plan B)</td>
<td>$7,770</td>
<td>$7,770</td>
<td>0.0%</td>
</tr>
<tr>
<td><strong>OSU</strong> Academic Year - Callahan Multiple (includes Premium meals)</td>
<td>9,738</td>
<td>$9,420</td>
<td>3.4%</td>
</tr>
<tr>
<td><strong>PSU</strong> Academic Year - Ondine FYE Multiple (unlimited meals)</td>
<td>$8,094</td>
<td>$7,995</td>
<td>1.2%</td>
</tr>
<tr>
<td><strong>SOU</strong> Academic Year - Cascade Multiple (includes Medium meals)</td>
<td>$9,084</td>
<td>$8,556</td>
<td>6.2%</td>
</tr>
<tr>
<td><strong>UO</strong> Academic Year - Multiple (Double includes Standard meals)</td>
<td>$9,501</td>
<td>$9,137</td>
<td>4.0%</td>
</tr>
<tr>
<td><strong>WOU</strong> Academic Year - Heritage Multiple (includes meal Plan #2)</td>
<td>$8,020</td>
<td>$7,770</td>
<td>3.2%</td>
</tr>
</tbody>
</table>

Note: Room and Board rates represent a sample of available options for comparison purposes. See Housing section for more selections.
OPPORTUNITY FOR PUBLIC COMMENT

Two public hearings were held on the proposed 2011-12 Academic Year Fee Book: Thursday, May 12, in the Memorial Union Board Room on the Oregon State University campus and Friday, May 13, in the Alsea River Room of the Erb Memorial Union on the University of Oregon campus. Previously, these public hearings were held in administrative buildings but, in seeking greater convenience, this year’s hearings were offered in student unions. Communications about the Fee Book calendar, hearings, and draft documents go to customary interested parties: Student Body presidents, Budget Directors, Housing Directors, Registrars, Vice Presidents for Student Affairs, and the Oregon Student Association.

A new opportunity for public input was made available this year by providing a dedicated email address on the OUS website along with the draft fee book. No oral or written testimony was received at the public hearing but 18 responses from students were submitted via email. A full report of all testimony follows the Draft Fee Book but the following table summarizes the student responses by campus:

<table>
<thead>
<tr>
<th>Campus</th>
<th>In Support of Proposed Rates</th>
<th>Urging “keep tuition low/affordable” or Opposed to Specific Proposed Rates</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>EOU</td>
<td>1</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>OIT</td>
<td>0</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>OSU</td>
<td>0</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>PSU</td>
<td>1</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>SOU</td>
<td>2</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>UO</td>
<td>14</td>
<td></td>
<td>14</td>
</tr>
<tr>
<td>WOU</td>
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<td></td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td>1</td>
<td>17</td>
<td>18</td>
</tr>
</tbody>
</table>

STAFF RECOMMENDATIONS TO THE BOARD

1. Staff recommends that the Board:
   Approve the early fee collection as proposed by the University of Oregon for the expansion of the Erb Memorial Student Union Building (EMU) and the renovation of the Student Recreation Center (SRC).

2. Staff recommends that the Board adopt OAR 580-040-0040 by permanent rule as follows:

   **OAR 580-040-0040 Academic Year Fee Book**

   Through this action, the document entitled “Academic Year Fee Book” dated June 3, 2011, is hereby amended by reference as a permanent rule. All prior adoptions of academic year fee documents are hereby repealed except as to rights and obligations previously acquired
or incurred there under. The Chancellor or designated staff is permitted to make revisions as needed to comport with any subsequent legislative actions and is authorized to make minor adjustments to the final document, if necessary.

(Board action required.)