

Policy and Management Roles of the State, Board, System Office, and Institutions

Affordability, Tuition, and Financial Aid

| State | Board | System Office | Institution |
|--|---|---|---|
| <ol style="list-style-type: none"> 1. Legislature provides General Fund allocation to fund the Oregon Opportunity Grant. 2. Legislature approves expenditure levels for OUS tuition-generated revenue. 3. Legislature establishes Building Fee limits. 4. Legislation requires broad public input and campus disclosure of intended fee changes (ORS 351.072). <li style="background-color: #e0e0e0;">5. Legislature reflects degree of legislative intent on tuition-related issues through budget notes (e.g., fee remission restrictions). | <ol style="list-style-type: none"> 1. Board approves instruction fee (tuition) rates proposed by institutions. 2. Board approves changes in institution tuition structure (e.g., tuition plateau; time-of-day discounts). 3. Board approves resource fees proposed by institutions. 4. Board approves incidental and health service fee rates, upon recommendation from institution president, following initiation by campus student incidental fee committee. 5. Board sets building fee, pursuant to Legislative limits. 6. Board approves residence hall room and board rates proposed by institutions. 7. Board establishes residency policy for fee-paying status of students as Oregon resident or nonresident. <li style="background-color: #e0e0e0;">8. Board policy requires a System review of institution tuition and fee proposals with respect to affordability, predictability, and access, with consideration given to their impact on other sectors of public education... <i>[to be further developed]</i> | <ol style="list-style-type: none"> 1. System office reviews fiscal, enrollment impact, and legal standing issues in institution proposals for tuition/fee rates and fee remission programs; makes recommendations to the Board. Key variables reviewed: <ul style="list-style-type: none"> • Rates of increase compared to peers/Western states (predictability); • Loan indebtedness (affordability); • Effect on income distribution of enrollment (affordability); • Effect on student diversity (access); • Anticipated impact on Oregon community colleges (P-16 partnerships). 2. System office staffs the Interinstitutional Residency Committee, which hears appeals on disputed residency classification decisions. 3. System office coordinates an advisory Interinstitutional Fee Committee, which provides analysis and policy support for the Administrative and Academic Councils. 4. In accordance with 1997 SB 919, System office establishes broad affordability indicators; regularly reports them as part of <i>OUS Performance Indicators and Links to Oregon Benchmarks</i>. Indicators include: <ul style="list-style-type: none"> • Percent of Oregon undergraduates receiving Pell grants; • Percent of total cost of attendance covered by grants for needy students; • Average debt burden of recent graduates. | <ol style="list-style-type: none"> <li style="background-color: #e0e0e0;">1. Institution proposes instruction fees, and develops institution-based changes in tuition structure for System review and Board approval. 2. Institution proposes program/resource fees for Board approval. 3. President approves incidental fees, upon recommendation from student incidental fee committee, and recommends Board approval. 4. Institution proposes residence hall room and board rates for Board approval. 5. Institution establishes fees for continuing education/self-support courses, including instruction and resource fee assessments for those courses. 6. Institution establishes course fees and levies fines. <li style="background-color: #e0e0e0;">7. Institution develops and implements institution-funded fee remission programs. 8. Institution administers state and federal financial aid to students. <li style="background-color: #e0e0e0;">9. Institution monitors affordability using such indicators as: <ul style="list-style-type: none"> • <i>[to be added]</i> • • |

NOTE: Shaded text indicates areas in need of focused discussion, clarification, and/or development.