Financial Aid at the University of Oregon

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Financial Aid Overview

- \$305m in financial aid
- 78% of first year students receive aid
- 23% of freshmen are Federal Pell Grant eligible.
- 42% of the graduating class have student debt
 - Average debt of borrowers: \$24,823



Cost of Attendance

- Resident Cost of Attendance: \$35,721
- Non-Resident Cost of Attendance: \$64,302

Resident Tuition and Fees: \$15,669

Non-Resident Tuition and Fees: \$43,302

Food and Housing: \$15,840 Books and Supplies: \$1,320

Resident Travel: \$432

Non-Resident Travel: \$1,380

Miscellaneous: \$2,460



Need Based Financial Aid

- Federal Pell Grant
- Federal SEOG
- Federal Work Study
- Federal Direct Loans
- Oregon Opportunity Grant
- PathwayOregon Award*
- Diversity Excellence Scholarship*

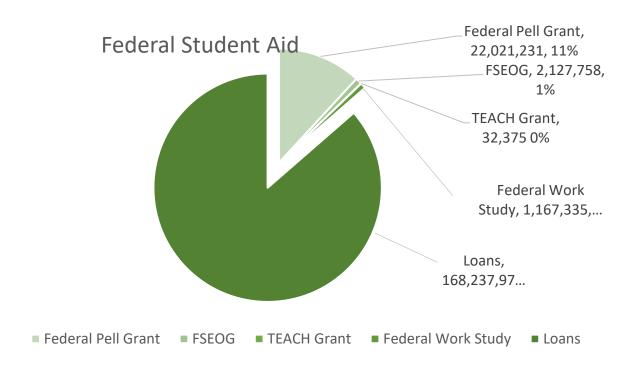


Merit Based Financial Aid

- Stamps Scholarship
- Presidential Scholarship
- Excellence Scholarship
- Summit Scholarship
- Apex Scholarship
- PathwayOregon Scholarship*
- Diversity Excellence Scholarship*



Federal Student Aid Snapshot, FY23



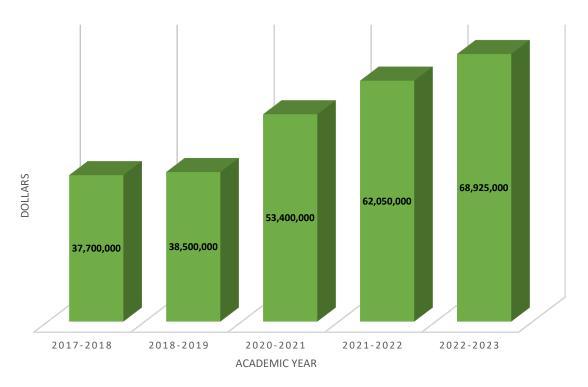


State Financial Aid Snapshot, FY23

- Oregon Opportunity Grants: \$11,517,840
 - FY23 grant range: \$2,352 to \$4,692
 - FY24 grant range: \$3,000 to \$7,524
- Foster Youth Tuition Waiver: \$20,670
- State Scholarships: \$1,872,618
- National Guard Tuition Assistance: \$329,508

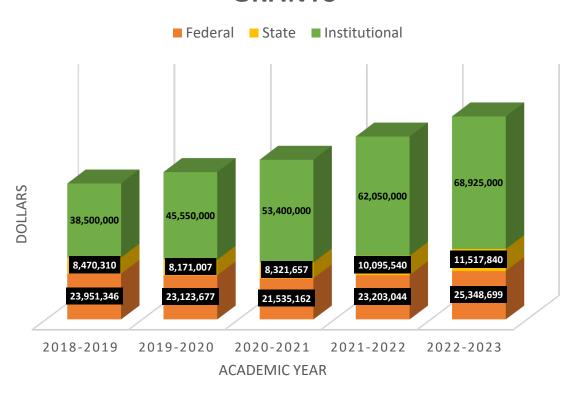


INSTITUTIONAL AID BUDGET

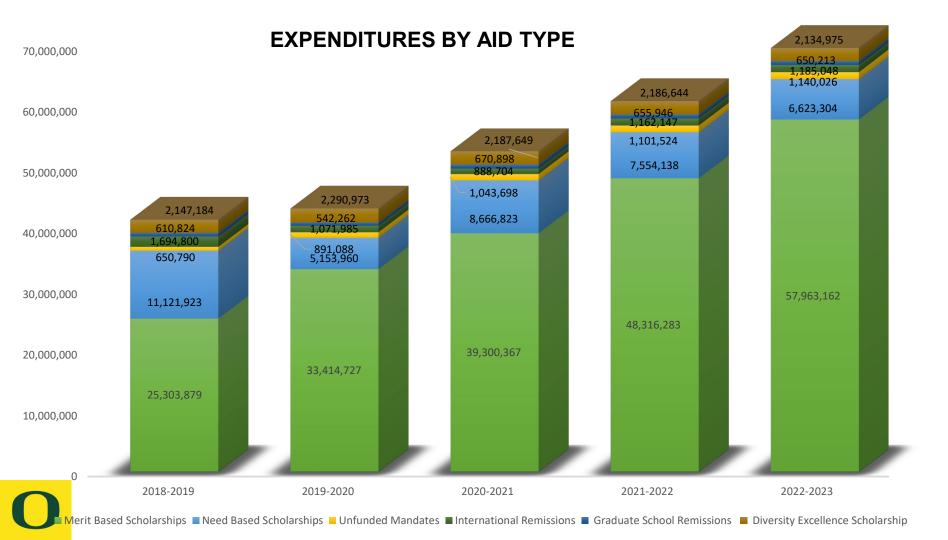




INSTITUTIONAL, FEDERAL, STATE GRANTS







UO Scholarship Eligibility and Amounts

Changes in 2019, 2021, 2023, 2024

	2016 Programs		2019 Programs		2021 Programs		2023 Programs		2024 Programs		
	Eligibility	Award	Eligibility	Award	Eligibility	Award	Eligibility	Award	Eligibility	Award	
Resident											
	3.80 GPA/1250										
Summit	SAT	\$6,000	3.80 GPA/1250 SAT	\$6,000	3.90 GPA	\$4,000	3.90 GPA	\$5,000	3.90 GPA	\$5,000	
	3.60 GPA/1220										
Apex	SAT	\$3,000	3.60 GPA/1220 SAT	\$3,000	3.70 GPA	\$2,000	3.70 GPA	\$2,000	3.70 GPA	\$2,000	
	3.40 GPA/	Tuition/		Tuition/	3.40 GPA/	Tuition/	3.40 GPA/	Tuition/	3.40 GPA/	Tuition/	
PathwayOregon	Pell eligible	Fees	3.40 GPA/Pell eligible	Fees	Pell eligible	Fees	Pell eligible	Fees	Pell eligible	Fees	
					<u> </u>				<u> </u>		
Non-Resident											
Excellence	None		3.90 GPA/1450 SAT	\$15,000	Non-Auto	\$15,000	3.90 GPA/1450 SAT	\$15,000	Non-Auto	\$20,000	
	3.80 GPA/										
Summit	1250 SAT	\$9,000	3.80 GPA/1250 SAT	\$10,000	3.90 GPA	\$10,000	3.80 GPA/1250 SAT	\$10,000	3.90 GPA	\$12,500	
	3.60 GPA/										
Apex	1220 SAT	\$4,000	3.60 GPA/1220 SAT	\$7,500	3.70 GPA	\$7,500	3.60 GPA/1220 SAT	\$7,500	3.70 GPA	\$10,000	

The implementation of test optional admissions in 2021 increased the number of scholarship eligible students and required a change in scholarship amounts.



Application Process

- Apply for Admission
- File the FAFSA / ORSAA
- File any Institutional Application



FAFSA Data

- Family Income taxed, untaxed
- Family Assets cash, savings, investments, business/farm (with exclusions)
- Number of Family Members
- Number of Family in College



Financial Need

Cost of attendance – EFC = Need

• Resident example: 35,721 - 2,000 = 33,721

• Non-Resident example: 64,302 - 2,000 = 62,302



Resident Financial Aid Offer EFC=\$2,000

Federal Pell Grant: \$5,445

Oregon Opportunity Grant: \$7,008

PathwayOregon Award: \$3,216

Federal Work Study: \$2,000

Federal Direct Subsidized Loan: \$3,500

Federal Direct Unsubsidized Loan: \$2,000

Federal Direct PLUS Loan: \$12,552



Non-Resident Financial Aid Offer EFC=\$2,200

Scholarship: \$15,000

Federal Pell Grant: \$5,445

Federal Direct Subsidized Loan: \$3,500

Federal Direct Unsubsidized Loan: \$2,000

Federal Direct PLUS Loan: \$39,857



2024-2025 Changes

- FAFSA availability by December 31, 2023
 - Institutional receipt of data by the end of January 2024
- Fewer questions 108 to 46
- Contributors
 - FSA ID
 - · Who provides the most support?
- Future Act Direct Data Exchange IRS code amended to mandate disclosure of FTI directly from the IRS to ED with consent (required)
- Family size changed to align with individuals reported as dependents on the tax return
- Number in college no longer impacts SAI



2024-2025 Changes

- Business / Farm net worth
 - No longer limited to businesses with > 100 employees
 - · Family farm is included
- Calculation of a SAI instead of an EFC
 - Can be negative, up to -\$1,500
- No SAI proration
- Child support is an asset
- Emergency financial assistance is not OFA
- Enrollment intensity



	Expected Family Contribution																															
Cost of Attendance													2901	3001																		
	To	То	То	To	То	To	То	To	То	То	To	To	То	То	То	То	To	To	To	То	То	To	То	To	То	То	То	То	To	То	To	To
	0	100	200	300	400	500	600	700	800	900	1000	1100	1200	1300	1400	1500	1600	1700	1800	1900	2000	2100	2200	2300	2400	2500	2600	2700	2800	2900	3000	3100
3800 - 3899	3850	3800	3700	3600	3500	3400	3300	3200	3100	3000	2900	2800	2700	2600	2500	2400	2300	2200	2100	2000	1900	1800	1700	1600	1500	1400	1300	1200	1100	1000	900	800
3900 - 3999	3950	3900	3800	3700	3600	3500	3400	3300	3200	3100	3000	2900	2800	2700	2600	2500	2400	2300	2200	2100	2000	1900	1800	1700	1600	1500	1400	1300	1200	1100	1000	900
4000 - 4099	4050	4000	3900	3800	3700	3600	3500	3400	3300	3200	3100	3000	2900	2800	2700	2600	2500	2400	2300	2200	2100	2000	1900	1800	1700	1600	1500	1400	1300	1200	1100	1000
4100 - 4199	4150	4100	4000	3900	3800	3700	3600	3500	3400	3300	3200	3100	3000	2900	2800	2700	2600	2500	2400	2300	2200	2100	2000	1900	1800	1700	1600	1500	1400	1300	1200	1100
4200 - 4299	4250	4200	4100	4000	3900	3800	3700	3600	3500	3400	3300	3200	3100	3000	2900	2800	2700	2600	2500	2400	2300	2200	2100	2000	1900	1800	1700	1600	1500	1400	1300	1200
4300 - 4399	4350	4300	4200	4100	4000	3900	3800	3700	3600	3500	3400	3300	3200	3100	3000	2900	2800	2700	2600	2500	2400	2300	2200	2100	2000	1900	1800	1700	1600	1500	1400	1300
4400 - 4499	4450	4400	4300	4200	4100	4000	3900	3800	3700	3600	3500	3400	3300	3200	3100	3000	2900	2800	2700	2600	2500	2400	2300	2200	2100	2000	1900	1800	1700	1600	1500	1400
4500 - 4599	4550	4500	4400	4300	4200	4100	4000	3900	3800	3700	3600	3500	3400	3300	3200	3100	3000	2900	2800	2700	2600	2500	2400	2300	2200	2100	2000	1900	1800	1700	1600	1500
4600 - 4699	4650	4600	4500	4400	4300	4200	4100	4000	3900	3800	3700	3600	3500	3400	3300	3200	3100	3000	2900	2800	2700	2600	2500	2400	2300	2200	2100	2000	1900	1800	1700	1600
4700 - 4799	4750	4700	4600	4500	4400	4300	4200	4100	4000	3900	3800	3700	3600	3500	3400	3300	3200	3100	3000	2900	2800	2700	2600	2500	2400	2300	2200	2100	2000	1900	1800	1700
4800 - 4899	4850	4800	4700	4600	4500	4400	4300	4200	4100	4000	3900	3800	3700	3600	3500	3400	3300	3200	3100	3000	2900	2800	2700	2600	2500	2400	2300	2200	2100	2000	1900	1800
4900 - 4999	4950	4900	4800	4700	4600	4500	4400	4300	4200	4100	4000	3900	3800	3700	3600	3500	3400	3300	3200	3100	3000	2900	2800	2700	2600	2500	2400	2300	2200	2100	2000	1900
5000 - 5099	5050	5000	4900	4800	4700	4600	4500	4400	4300	4200	4100	4000	3900	3800	3700	3600	3500	3400	3300	3200	3100	3000	2900	2800	2700	2600	2500	2400	2300	2200	2100	2000
5100 - 5199	5150	5100	5000	4900	4800	4700	4600	4500	4400	4300	4200	4100	4000	3900	3800	3700	3600	3500	3400	3300	3200	3100	3000	2900	2800	2700	2600	2500	2400	2300	2200	2100
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5400 - 5499	5450	5400	5300	5200	5100	5000	4900	4800	4700	4600	4500	4400	4300	4200	4100	4000	3900	3800	3700	3600	3500	3400	3300	3200	3100	3000	2900	2800	2700	2600	2500	2400
5500 - 5599	5550	5500	5400	5300	5200	5100	5000	4900	4800	4700	4600	4500	4400	4300	4200	4100	4000	3900	3800	3700	3600	3500	3400	3300	3200	3100	3000	2900	2800	2700	2600	2500
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5800 - 5899	5850	5800	5700	5600	5500	5400	5300	5200	5100	5000	4900	4800	4700	4600	4500	4400	4300	4200	4100	4000	3900	3800	3700	3600	3500	3400	3300	3200	3100	3000	2900	2800
5900 - 5999	5950	5900	5800	5700	5600	5500	5400	5300	5200	5100	5000	4900	4800	4700	4600	4500	4400	4300	4200	4100	4000	3900	3800	3700	3600	3500	3400	3300	3200	3100	3000	2900
6000 - 6099	6050	6000	5900	5800	5700	5600	5500	5400	5300	5200	5100	5000	4900	4800	4700	4600	4500	4400	4300	4200	4100	4000	3900	3800	3700	3600	3500	3400	3300	3200	3100	3000
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6400 - 6499	6450	6400	6300	6200	6100	6000	5900	5800	5700	5600	5500	5400	5300	5200	5100	5000	4900	4800	4700	4600	4500	4400	4300	4200	4100	4000	3900	3800	3700	3600	3500	3400
6500 - 6599	6550	6500	6400	6300	6200	6100	6000	5900	5800	5700	5600	5500	5400	5300	5200	5100	5000	4900	4800	4700	4600	4500	4400	4300	4200	4100	4000	3900	3800	3700	3600	3500
6600 - 6699	6650	6600	6500	6400	6300	6200	6100	6000	5900	5800	5700	5600	5500	5400	5300	5200	5100	5000	4900	4800	4700	4600	4500	4400	4300	4200	4100	4000	3900	3800	3700	3600
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6800 - 6899	6850	6800	6700	6600	6500	6400	6300	6200	6100	6000	5900	5800	5700	5600	5500	5400	5300	5200	5100	5000	4900	4800	4700	4600	4500	4400	4300	4200	4100	4000	3900	3800
6900 - 6999	6950	6900	6800	6700	6600	6500	6400	6300	6200	6100	6000	5900	5800	5700	5600	5500	5400	5300	5200	5100	5000	4900	4800	4700	4600	4500	4400	4300	4200	4100	4000	3900
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2024-2025 Changes

- Pell calculations changed
 - Max Pell
 - SAI <= \$0
 - Parent is not required to file a tax return
 - Single parent with AGI > \$0 and <= 225% of the poverty guideline for family size and state of residence
 - Not a single parent with AGI > \$0 and <= 175% of the poverty guideline for family size and state of residence
 - Calculated Pell
 - Max Pell (\$7,850) SAI = Pell award
 - Minimum Pell
 - Single parent with AGI <= 325% of the poverty guideline for family size and state of residence
 - Not a single parent with AGI <= 275% of the poverty guideline for family size and state of residence



Fundraising

- During our last campaign, we raised \$119M for scholarships and student support.
- This exceeded our goal by over 60%.
- \$13.1M in endowed funds
- \$100M gift for Children's Behavioral Health



Questions?

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