**Tuition and Fee Advisory Board of the University of Oregon**

**Meeting Summary | November 18, 2022**

The 2022–2023 Tuition and Fee Advisory Board (TFAB) of the University of Oregon met in room 107 (Miller) of the Erb Memorial Union at 8:15 a.m. on Thursday, November 18, 2022. A remote option was available by request; four participants attended the meeting remotely. Below is a summary of the meeting; documents discussed during the session are available [online](https://tuition.uoregon.edu/updates).

**Attending**: Krista Borg (remote), Jim Brooks, Deborah Butler (guest), Robin Clement, Renée Dorjahn, Brian Fox, Luda Isakharov, Heather Kingsley, Stuart Laing (guest, remote), Lauryn Lilly, Jamie Moffitt (co-chair), JP Monroe, Brad Morin (remote), Cass Moseley, Jim Murez (guest), Erick Njue, Grant Schoonover, Sam Schwartz (guest), Kathie Stanley (remote), Kris Winter (co-chair), Harry Wonham, Ben Young.

**Staff**: Debbie Sharp (Office of the senior VPFA)

**Introductions**.Co-chair Kris Winter, interim vice president for student life, welcomed the group and invited people to introduce themselves.

**Primer on financial aid**. Jim Brooks, senior associate vice president student services and enrollment management, provided an overview of financial aid at the university, covering topics such as the cost of attendance, need-based and merit-based financial aid, state financial aid, and ways that resident and non-resident students can access financial aid.

The group discussed levels of student debt held by resident and non-resident students; changes planned for the FAFSA (Free Application for Federal Student Aid) process in coming years; how the EFC (Expected Family Contribution) impacts financial aid; tuition remissions; and the PathwayOregon program, which provides full tuition and fees for academically-qualified Pell-eligible undergraduate resident students.

**Cost drivers analysis**. Brian Fox, associate vice president for budget, financial analysis, and data analytics, shared updated cost driver data with the group. He explained the projected FY24 cost increases for faculty, staff, and graduate employee salary and wages, medical costs, retirement costs, Oregon Paid Leave, blended OPE (Other Payroll Expenses), institutional expenses, and strategic investments.

The group talked about Oregon Paid Leave—a new tax/benefit that will be implemented in FY24, how blended OPE works, the need to negotiate with the federal government about any blended benefit rates that are applied to federal grants, and how the Ballmer Institute is funded.

**Cost management plan**. Co-chair Jamie Moffitt, senior vice president for finance and administration and CFO, shared a document detailing how the governing board and university administration are managing costs on an ongoing basis. She noted a commitment to keeping costs as low as possible, sharing ways the Board of Trustees (BOT) and university leadership regularly review annual projected expenditures, quarterly financial projections, benchmarking information, long-term financial scenarios, and large university cost drivers such as PEBB and PERS.

**Long-term projections**. Fox provided an overview of the UO’s long-term projections for the Education and General Fund, explaining that the analysis includes a range of scenarios the university could face in the next five years. He noted that the scenarios are intended to illustrate the projected impact of different variables, such as tuition rates for entering undergraduate cohorts, state appropriation levels, enrollment levels, and inflation. The group also received a memo on E&G fund long-term projections that was presented to the BOT in May 2022.

The group clarified actual and projected numbers for each scenario and discussed the university’s relatively low fund balance in terms of weeks of operating expenses when compared to other large public research universities.

**Adjournment**. The meeting adjourned at 9:44 a.m.