

To: Michael Schill, President
From: Jamie Moffitt, Vice President for Finance & Administration and CFO, TFAB Co-Chair, and Kevin Marbury, Vice President for Student Life, TFAB Co-Chair
Date: February 20, 2020
Re: Recommendations of the FY2020 Tuition and Fee Advisory Board (TFAB)
Cc: Patrick Phillips, Senior Vice President and Provost

This year the Tuition and Fee Advisory Board (TFAB) included five students (one graduate student and four undergraduate students, including the ASUO President and ASUO State Affairs Commissioner), faculty, deans, vice presidents, vice provosts, and administrative staff engaged in budgeting, institutional research, and financial aid. A list of TFAB members is included at the end of this memo. We also had many other students and staff who regularly participated in TFAB meetings throughout the year.

The TFAB met eleven times, from October 2019 through February 2020. All meetings were open to the public. We consistently had guests join our discussions including several students and reporters from the *Daily Emerald*. A list of guests is included at the end of this memo.

Fall meetings focused on the TFAB charge, historical and comparative information, the university budget, mechanisms by which moneys are appropriated by the Legislative Assembly to the Higher Education Coordinating Commission (HECC) for allocation to public universities, the growth initiative, long-term Education and General (E&G) fund financial projections, cost drivers, and a plan for cost management. Winter meetings covered the president's charge to the TFAB to explore guaranteed tuition, the concept of guaranteed tuition, course fees, discussion of guaranteed tuition models, specific proposals for graduate tuition, housing rates and mandatory fees, as well as planning for and discussion of feedback from the student forum. The TFAB also spent time discussing the potential impact of guaranteed tuition on current and prospective students, recruitment efforts, and predicted enrollment for FY2021. The TFAB engaged in extensive discussions of various aspects of guaranteed tuition, including whether it should be optional or mandatory, the duration of the guarantee, the inclusion of mandatory fees and differential tuition, and how to transition current UO undergraduate students—particularly current juniors—into a new tuition system in a fair and equitable way.

In addition to eleven TFAB meetings, the TFAB and ASUO co-hosted a student forum on the tuition-setting process in mid-January, which was attended by about 75 people. The forum included a presentation on the concept of guaranteed tuition, including current thoughts on parameters for discussion by participants. Following the presentation, students participated in small group discussions, facilitated by TFAB members and senior staff. Questions and feedback from the small group discussions were discussed at subsequent TFAB meetings—student input on the concept of guaranteed tuition informed advisory board discussions throughout the winter meetings. A second student forum, which you will host, has been scheduled for Monday, February 24th.

The university's tuition website (<https://tuition.uoregon.edu/>) has been kept up to date throughout the TFAB deliberation process, with the meeting schedule and locations posted weeks in advance,

and meeting materials and documents uploaded after every TFAB meeting. The website provides information about tuition and fees, the tuition-setting process, state appropriations, cost drivers, the university's budget, and budget and tuition information for Pac-12 and Association of American Universities comparator schools. The website also provides the schedule of TFAB meetings, with links to agendas and all relevant documents and data that the TFAB considered during deliberations. Meeting notes from each TFAB session are also posted.

Guaranteed Tuition Analysis

In January 2020, you asked the TFAB to analyze the concept of guaranteed tuition and determine whether the group recommended the adoption of such a program or, alternatively, the continuation of a tuition structure that involved annual tuition increases for all students.

Pros and cons of guaranteed tuition

Over the seven TFAB meetings that were conducted during winter term, TFAB members discussed a number of the pros and cons of implementing a guaranteed tuition program, whereby tuition rates for new undergraduate students would be locked (that is, unchanged) for five years. The biggest advantage identified by TFAB members was the certainty such a program would provide to students and families about the cost of education at the University of Oregon. TFAB members discussed how guaranteed tuition would help incoming students and their families understand and plan for education costs. Furthermore, with a guaranteed program, the risk of significant, unexpected increases in tuition would be eliminated for students. Once students enroll at the University of Oregon under the guaranteed tuition program their tuition rates would be locked for five years – no matter what. Another advantage discussed by the TFAB was that students with scholarship packages would not see a decline in the value of those scholarships each year because their cost of attendance would no longer be subject to annual tuition increases.

Roger Thompson, Vice President for Student Services and Enrollment Management, met with the TFAB several times to share his perspective on the impact that a guaranteed tuition program could have on student recruitment efforts. He explained that he believes a guaranteed tuition program would help with recruitment, particularly in light of tuition costs and aid packages at comparator schools, a number of which already offer or are considering offering guaranteed tuition. The TFAB discussed the fact that guaranteed tuition would help prospective students and families to budget with certainty around education costs, which should positively impact student retention as well.

The biggest disadvantage identified by the TFAB around guaranteed tuition is the financial risk to the institution if the university were to face a significant financial crisis. For example, if there were a big financial downturn and the legislature drastically cut state appropriations, in the short term the university would not be able to adjust tuition revenue as quickly to accommodate the loss. With a guaranteed tuition program, the university would be committed to keeping tuition rates locked for current students during their five-year guarantee periods. The only tuition rates that could be adjusted would be tuition rates for the incoming student cohort, which only make up a portion of the total student body. The institution would also need to be very careful to keep tuition rates for new students competitive. While the university would eventually be able to adjust tuition

rates to help address a budget gap, in the short term, E&G fund balances (which are already very low compared to other institutions across the country) would have to be used. The TFAB discussed ways to mitigate this risk, including considering an insurance charge on tuition, as well as the development of a reserve fund. The TFAB recommends that a reserve fund be established. While the final round of TFAB deliberations included discussion of a \$3 million reserve transfer in FY2021, the advisory group recognized that the budget parameters of such a reserve should be determined by the President and Board of Trustees.

Following these discussions, the TFAB developed a recommendation for undergraduate tuition rates for the coming academic year. This recommendation includes transitioning to a guaranteed tuition program for all new matriculated (admitted and enrolled) undergraduate students and putting in place a guaranteed set of smaller, annual tuition rate increases over the next four years for current students.

Structure of Proposed Guaranteed Tuition Program

The TFAB discussed the structure of a guaranteed tuition program and recommends that a program be implemented with the following operational parameters:

New incoming students (freshmen and transfer students)

New, incoming undergraduate students would be charged a set tuition rate (per student credit hour or SCH) that will be guaranteed for five cohort years. There will be separate rates for resident and non-resident students. This new program will enable students to know the expected cost of their education before they decide to attend the UO. Each new annual cohort of students will be assessed a new cohort rate. Rates will be guaranteed for five cohort years.

Current students

The TFAB does not recommend that current students be charged the FY2021 incoming cohort rates. Instead the recommendation is for the Board to pre-approve a set of modest and guaranteed annual increases for current students for the next four years. This proposed structure will both (1) provide current students with certainty about their remaining tuition costs, and (2) avoid some of the interclass equity issues that one larger final increase would have created (i.e., juniors having to pay the same final tuition rate increase as freshmen who would benefit from the final increase for more years). This proposed structure addresses a concern raised at the student forum held in January.

Other recommended operational parameters of the guaranteed tuition program include the following:

Operational Details	
Effective date	Fall 2020 (includes summer 2020 for new students)
Applies to	New (incoming), matriculated, admitted and enrolled undergraduate students; either on-campus or online

Optional or Mandatory	Mandatory
Includes	Undergraduate tuition; administratively controlled mandatory fees; summer tuition rates; differential tuition (both Honors College and Lundquist College of Business); international student fee. Does not include the incidental fee that is managed by ASUO.
Cohort Terms	Summer, fall, winter, spring <ul style="list-style-type: none"> • New students: pay new guaranteed cohort rate • Continuing students – pay smaller pre-approved annual increases each year
Duration of Guarantee-new students (first-time and transfer)	5 cohort years: each group of new students are assessed a new cohort rate
Duration of Guarantee-continuing students (students enrolled prior to summer 2020)	4 years: continuing students are assessed a guaranteed, set rate of modest annual increases for four years.
Rate for enrollment beyond guarantee-new students enrolled after 2020	For each year students continue taking classes beyond their cohort guarantee, they would pay the rate of the cohort behind them (e.g., the rate in the sixth year would be one cohort behind; the rate in seventh year would be two cohorts behind, etc.)
Rate for enrollment beyond guarantee-continuing student enrolled beyond 2024	For each year students continue taking classes beyond their cohort guarantee, they would pay the rate of the cohort behind them (e.g., the rate in fifth year would be one cohort behind; the rate in sixth year would be two cohorts behind, etc.)
Time in Exchange or Study Abroad Programs	Counted as part of 4 or 5-year guarantee period
Time serving with U.S. Military or other U.S. National Defense Services if called to active duty	Exempt from 4 or 5-year guarantee period
Ability to Appeal for additional terms	Yes

Proposed Guaranteed Tuition Rates

The TFAB recommends the following guaranteed tuition rates for undergraduates for the coming academic year. Please see information later in this memo about TFAB discussions and analysis supporting these recommendations:

- **Continuing students**
 - o Resident: 3% annual increase per year, guaranteed for up to four years. For the upcoming academic year, this translates into a \$6.96 per student credit hour (SCH) increase (3.00%), from \$232 per SCH to \$238.96 per SCH. This increases tuition on a full-time annual basis to \$10,753 (a \$313 increase) effective for fall 2020.

- o Non-resident: 3% annual increase per year, guaranteed for up to four years. This translates to a \$22.89 per student credit hour (SCH) increase (3.00%), from \$763 per SCH to \$785.89 per SCH. This increases tuition on a full-time annual basis to \$35,365 (a \$1,030 increase) effective for fall 2020.

When developing the recommendations for current students, the TFAB discussed several very important issues. The first was the desire to provide some certainty around tuition costs for existing students. The second was a desire to try and keep the annual proposed tuition rates below the 5 and 10-year average rates of increase that the UO has seen over the past decade. The final proposal was also based on the belief that these transitional rates for current students would be easier to communicate if they were consistent across all students, and for each of the next four years.

- ***New students***

- o Resident: The guaranteed resident tuition rate will be set at \$256.94 per credit hour (10.75% above FY2020 rate). This tuition rate is guaranteed for five years, and will not increase during that time. Annual full-time tuition for new resident undergraduates will be locked at \$11,562 per year for five cohort years.
- o Non-resident: The guaranteed non-resident tuition rate will be set at \$820.23 per SCH (7.50% above FY2020 rate). This tuition rate is guaranteed for five years and will not increase during that time. Annual full-time tuition for new non-resident undergraduates will be \$36,910—guaranteed for five cohort years.

This tuition proposal, after setting aside 10% of new revenue for fee remissions, which is standard UO practice, is expected to generate approximately \$16.5 million of incremental revenue. This figure assumes projected enrollment at targeted levels and includes an approximation of revenue generated by summer tuition.

The rates above were selected for undergraduate resident and non-resident tuition for new and existing students taking into account the current budget deficit while also trying to keep tuition increases as low as possible for current and new UO students.

Attached to this memo are charts showing how the guaranteed tuition rates for new students compare to the rates that they would have paid if the institution continued to increase tuition annually for all students. For purposes of this analysis, the following information is helpful context:

- ***Resident students***

- o 10-year average tuition rate increases: 5.4%
- o 5-year average tuition rate increases: 5.0%
- o Assumed average annual tuition rate increases in the charts: 4.5%

- **Non-resident students**

- 10-year average tuition rate increases: 4.3%
- 5-year average tuition rate increases: 3.3%
- Assumed average annual tuition rate increases in the charts: 3.25%

Below is a summary of the financial terms being proposed for the new guaranteed tuition program:

Financial Details	
Guaranteed Tuition Rates for New Undergraduates – Locked for Five years	Resident: \$256.94 per SCH (10.75% above FY2020 Rates) Non-resident: \$820.23 per SCH (7.50% above FY2020 Rates)
Tuition Rate - Continuing Students	A guaranteed rate of smaller annual increases Resident and non-resident: 3% annually
Summer Rate-Residents	15% discount – guaranteed by cohort
Summer Rate-Non-Residents	35% discount – guaranteed by cohort
Administratively Controlled Mandatory Fees	Included in the guaranteed program – see proposed rates on pages 12-13
Honors College Differential	Included in the guaranteed program – see proposed rates on pages 13-14
Lundquist College of Business Differential	Included in the guarantee program – see proposed rates on page 14
Emergency Reserve	Recommended. Board and President responsible for structure and size.
Matriculation Fee	Follow normal practice: rate set based on resident tuition rate increase. See details below

Budget / Financial Information

In the current fiscal year, FY2020, the Education and General (E&G) fund, which covers the majority of the operations of the academic and non-auxiliary administrative functions of the university, is projected to be in deficit, with projected revenues unable to cover projected expenditures by approximately **\$10.3 million**. The TFAB took the projected current deficit into account when analyzing the financial position of the institution for next year, FY2021. The TFAB also considered the anticipated FY2021 cost drivers (below), as well as projected enrollment, state appropriations, and ongoing implementation of the spring 2019 \$11.6 million budget cut.

The TFAB analysis of the university’s financial position was discussed in the context of historical UO tuition increases and comparisons to tuition and fee costs and structures at peer public institutions.

For FY2021, the following major cost increases are projected in the E&G fund:

Cost Driver	Estimated FY2021 Cost Increase
Faculty, Staff, and Graduate Employee Salaries and Wages	\$11.6 million
Medical Insurance Costs	\$2.5 million
Retirement Costs	(\$0.5 million)
Institutional Expenses	\$0.5 million*
Strategic Investments	\$2.0 million
Minimum Wage Increase	\$1.9 million
Total Projected Cost Increases	\$18 million*

*Institutional expenses were originally projected to increase by \$1.5 million in FY2021, but savings identified in the power station budget reduced projected E&G fund utility costs by \$1.0 million.

The total projected cost driver increases for FY2021 are lower than last year (\$24.1 million) mainly due to the fact that the university is not subject to Public Employees Retirement System (PERS) increases this coming year. The \$18 million projected increase represents a 3.2% increase on the overall E&G budget.

FY2020 Budget Assumptions

The TFAB discussed the significant E&G fund budget gap facing the institution. Specifically the following budget factors were taken into account when discussing options and potential actions around tuition and fees.

Budget gap

- Existing FY2020 budget gap (as of Q1) \$10.3 million
- FY2021 cost drivers \$18.0 million
- Total gap in funding \$28.3 million

Budget gap offsets

- Projected FY21 increase in state appropriation \$3.2 million
- Year 2 implementation of spring 2019 cuts \$6.0 million
- Value of budget gap offsets \$9.2 million

Before exploring specific tuition scenarios, TFAB reviewed and discussed the average rate of historical tuition increases over the past decade. Specific data reviewed included:

- Resident Students
 - Average annual tuition increase over the last 10 years: 5.4%
 - Average annual tuition increase over the last 5 years: 5.0%

- Non-resident Students
 - Average annual tuition increase over the last 10 years: 4.3%
 - Average annual tuition increase over the last 5 years: 3.3%

With these budget assumptions and historical information in mind, the TFAB examined a range of guaranteed tuition scenarios to assess how students and the institution would be impacted. They included the following scenarios:

Tuition Rates				Remaining budget gap to be covered	Transfer to reserve fund (to be decided by the Board of Trustees)	New budget gap after transfer to reserve
Continuing students guaranteed annual increase, for the next 4 years (% & \$ increase per student credit hour)		New students increased rate that is guaranteed for 5 years (% & \$ increase per student credit hour)				
Resident	Non-Res	Resident	Non-Res			
3.0% (\$6.96/SCH)	3.0% (\$22.89/SCH)	10.75% (\$24.94/SCH)	7.50% (\$57.23/SCH)	\$2.6 million	\$1.0 million	\$3.6 million
3.0% (\$6.96/SCH)	3.0% (\$22.89/SCH)	10.25% (\$23.78/SCH)	7.75% (\$59.13/SCH)	\$2.5 million	\$1.0 million	\$3.5 million
3.25% (\$7.54/SCH)	3.25% (\$24.80/SCH)	9.90% (\$22.97/SCH)	7.75% (\$59.13/SCH)	\$2.0 million	\$1.0 million	\$3.0 million
3.25% (\$7.54/SCH)	3.25% (\$24.80/SCH)	11.75% (\$27.26/SCH)	7.50% (\$57.23/SCH)	\$1.7 million	\$1.0 million	\$2.7 million
3.25% (\$7.54/SCH)	3.25% (\$24.80/SCH)	10.75% (\$24.94/SCH)	7.50% (\$57.23/SCH)	\$2.0 million	\$1.0 million	\$ 3.0 million
3.5% (\$8.12/SCH)	3.5% (\$26.71/SCH)	9.90% (\$22.97/SCH)	7.75% (\$59.13/SCH)	\$1.5 million	\$1.0 million	\$ 2.5 million
4.0% (\$9.28/SCH)	3.62% (\$27.62/SCH)	10.0% (\$23.20/SCH)	9.0% (\$68.67/SCH)	\$202,830	\$1.0 million	(\$797,170)
4.0% (\$9.28/SCH)	3.62% (\$27.62/SCH)	9.90% (\$22.97/SCH)	7.75% (\$59.13/SCH)	(\$943,603)	\$1.0 million	(\$1.9 million)
3.25% (\$7.54/SCH)	3.25% (\$24.80/SCH)	10.75% (\$24.94/SCH)	7.50% (\$57.23/SCH)	\$2.0 million	\$3.0 million	\$ 5.0 million
3.0% (\$6.96/SCH)	3.0% (\$22.89/SCH)	10.75% (\$24.94/SCH)	7.50% (\$57.23/SCH)	\$2.6 million	\$3.0 million	\$5.6 million

Understanding the context of the existing budget gap and offsets—including \$6 million still being implemented from the spring 2019 \$11.6 million university-wide budget cut--the TFAB discussed a number of key issues around tuition rates and fees. These included:

- (1) The increasing burden on students of the cost of higher education
- (2) Balancing educational affordability and quality
- (3) The feasibility of campus growth
- (4) The appropriate level of funding gap
- (5) Whether guaranteed tuition would help current students and attract prospective students

Student burden: TFAB members spent a great deal of time discussing the increasing costs of higher education and the burden this places on students and their families. Understanding that inflation affects costs in the economy and that employee salaries, wages and benefits represent the bulk of the university budget, the TFAB discussed the fact that university costs typically go up between 3.0% and 5.0% per year, depending upon changes to PERS rates. Over the last five years, the institution has been forced to implement multiple rounds of budget cuts (resulting in faculty and staff position losses) and tuition increases that have averaged 5.0% for residents and 3.3% for non-residents.

The negative impact that rising tuition costs have had on students and their families was made clear by TFAB student members and guests as well as by students at the January student tuition forum. The TFAB discussed the general lack of understanding among students about increasing costs and the need for more education about the university's budget challenges. TFAB members also expressed concern about the financial demands being placed on students and the very real challenges that result from unexpected annual tuition and fee increases, even if they are unavoidable from a financial point of view. The TFAB discussed the significant burden on students who are not on the PathwayOregon program or receiving financial aid. Many of these students do not expect or plan for annual increases in tuition and fees, and some of them are priced out and forced to leave the UO. This concern for students was an important factor in the TFAB discussion about potential benefits of guaranteed tuition rates. The proposed program would shield both prospective and current students from unexpected, significant future tuition increases.

Balancing affordability and educational quality: The TFAB spent time discussing the need to find a balance between serving the educational needs of the students—providing a high quality education for an affordable price—with the very real financial constraints of the university budget. The group discussed how important it is to set up a tuition structure that ensures that the institution will have appropriate faculty and student support services staffing. In recent years the negative impact of budget and personnel cuts has been felt by students, faculty, and staff on campus.

Campus growth: The TFAB discussed the various factors impacting enrollment at the university. While the enrollment team was successful hitting its enrollment targets this past fall and recruited a much larger domestic non-resident freshmen class than in prior years, the university continues to face challenges due to international student enrollment trends. Specifically, total enrollment of international students has dropped by approximately 1,500 students which has had a very significant negative impact on the E&G fund budget. The TFAB discussed the enrollment targets for next year, as well as the fact that given the demographics of current international students, the university is projecting that international student enrollment will continue to drop as larger classes that graduate are replaced with smaller entering classes.

Funding gap: During TFAB discussions it was acknowledged that the current funding gap creates risks for the university. However, it was also discussed that the projection tool used by the TFAB only captures the major revenue and cost drivers for the E&G fund for FY2021. For this reason, TFAB members discussed that there was a need to balance keeping tuition rates as low as possible for new and continuing students with the reality that some projected “funding gap” may remain and have to be closed in FY2021 / FY2022.

Summer Tuition

The normal practice at the UO is to offer summer tuition to students at a discount from regular academic year rates. The current discount levels are 15% for resident tuition and 35% for non-resident tuition. The TFAB recommends that the institution maintain this practice, but apply these discount levels to each cohort’s guaranteed tuition rate. This will effectively wrap the cost of summer tuition into the five-year guarantee program. The TFAB also recommends that summer tuition rates for continuing students remain discounted with the discount applying to their previous regular academic year’s tuition rate.

SUMMER TUITION RATES FOR UNDERGRADUATES				
	New Undergraduates		Continuing Students	
	<i>(first-time enrollment occurs</i>		<i>(first-time enrollment occurred prior to Summer 2020)</i>	
	Resident	Nonresident	Resident	Nonresident
Summer 2020	Students charged a 15% discount on the 2020-21 cohort resident rate	Students charged a 35% discount on the 2020-21 cohort nonresident rate	Students charged a 15% discount on 2019-20 regular academic year resident rates for students starting prior to Summer 2020	Students charged a 35% discount on 2019-20 regular academic year nonresident rates for students starting prior to Summer 2020

International Student Fee

The TFAB recommends no increase to the current international fee. They also recommend that the international fee be included in the guarantee for new, incoming students, thus locking the rate for five cohort years.

Graduate Tuition

The deans were asked to provide their recommendations for graduate tuition rates for FY2021. Those rates were reviewed and discussed by the TFAB. With the exception of programs in the College of Business and the School of Law, proposed graduate tuition increases range from 0% to 3.1%.

The TFAB held separate sessions with the deans of the Lundquist College of Business and the School of Law to discuss their proposed tuition rates for FY2021.

The Lundquist College of Business (LCB) proposed resident tuition increases of between 0% and 20% in its graduate programs, with the highest increase being a result of restructuring changes to the Sports Product Management program. The Sports Product Management program is being restructured to make the total cost of the program the same for all students – whether resident, non-resident, on-campus, or online. TFAB members were generally supportive of the graduate tuition proposals in the Lundquist College of Business, particularly as most programs saw no increases.

The law school is proposing a 7% increase for resident and non-resident students in its Juris Doctorate (JD) program, a 5.0% increase for the Master of Laws (LLM) program, and a 3.5% increase in the cost of the Conflict and Dispute Resolution (CRES) Master's program. Increases were discussed with law students, faculty, and staff before the proposal was brought to the TFAB. TFAB members were generally supportive of the increases, which are helping to support key diversity and student success initiatives in the law school. Success initiatives include providing each graduating JD student with free access to a bar review course (which can cost up to \$4,000 if individually purchased, and the cost of which is not eligible for financial aid), which greatly assists those students with bar passage and employment success after graduation. The dean also shared tuition rates of comparative law schools. The analysis indicated that the proposed tuition rate increase would still keep the UO law school rates in line with other peer schools.

The TFAB recommends that the graduate and law recommendations be adopted. The graduate tuition increases are detailed on pages 16-17.

Fee Increases for Existing Mandatory Fees

The TFAB reviewed all of the proposals for mandatory fees, with the exception of the Incidental Fee (which runs through the ASUO's process).

Mandatory fee proposals for FY2021 were as follows:

- Building Fee: no increase
- Health Service Fee: no increase
- Rec Center Bond Fee: no increase
- Rec Center Fee: \$10.75 increase per from \$64.50 to \$75.25 (16.7%)
- EMU Fee: \$7 increase per term from \$70.00 to \$77.00 (10.00%)
- Technology Fee: no increase
- Total average increase of all administratively-controlled mandatory fees: 3.5%

The only significant mandatory fee increases proposed were the Rec Center Fee and the EMU Fee. This is in direct response to budget deficits in both units associated with the declining numbers of fee-paying students. The revenue issues for both units were created by both the decrease in overall campus enrollment over the last few years as well as the recent decision to reduce fees for off-campus students. In the summer there are many students taking online classes who are no longer assessed EMU or Rec Center fees. For this reason, both units have been using significant reserves to cover necessary recurring budget expenditures.

TFAB members were supportive of the increases, understanding the underlying budgetary pressures and appreciating that it is unsustainable for the Rec Center and EMU to continue covering the deficits with reserve funds. The total weighted annual increase to all administratively controlled mandatory fees is 3.5%.

The TFAB is recommending that all administratively controlled mandatory fees be included in the guaranteed tuition program. For this reason, we are proposing three separate sets of fee rates for FY2021. They are the following:

- **Graduate students:** who are not included in the tuition and fee guaranteed program would continue to pay rates that increase annually based on budget proposals. For next year, their total administratively-controlled mandatory fee assessments would increase 3.5%.
- **Undergraduate students–new (incoming):** The TFAB recommends that all administratively-controlled mandatory fee assessments would be wrapped into the guaranteed tuition program. This means that new (incoming) students would pay a rate that is unchanged for five years.

- **Undergraduate students—continuing:** The TFAB recommends that administratively-controlled fees for current (continuing) students follow the same pre-approved annual increases as tuition, increasing by 3% per year (averaged across all fees) for up to four years.

The detailed table for proposed FY2021 mandatory fees (per term) is as follows:

Administratively Controlled Mandatory Fees	All Graduate Students			Continuing Undergraduates		New, Incoming Undergraduate Students (2020 Cohort) - Locked Fees	
	FY2020 Fee	FY2021 Fee	% Increase	FY2021 Fee	% Increase	FY2021	% Increase
Building Fee	\$ 45.00	\$ 45.00	0.0%	\$ 45.00	0.0%	\$ 45.00	0.0%
Health Center Fee	\$ 233.25	\$ 233.25	0.0%	\$ 233.25	0.0%	\$ 233.25	0.0%
Rec Center Bond Fee	\$ 38.00	\$ 38.00	0.0%	\$ 38.00	0.0%	\$ 38.00	0.0%
Rec Center Fee	\$ 64.50	\$ 75.25	16.7%	\$ 72.56	12.5%	\$ 82.88	28.5%
EMU Fee	\$ 70.00	\$ 77.00	10.0%	\$ 77.00	10.0%	\$ 78.54	12.2%
Tech Fee	\$ 50.00	\$ 50.00	0.0%	\$ 50.00	0.0%	\$ 50.00	0.0%
Total	\$ 500.75	\$ 518.50	3.5%	\$ 515.81	3.0%	\$ 527.67	5.4%

The TFAB has two additional recommendations related to administratively-controlled fees. They are the following:

1. There are currently two separate Student Rec Center fees: (1) the Student Rec Center bond fee, and (2) the Student Rec Center fee. This is confusing to students. It is recommended that these two fees be combined into one fee for FY2021 called the Student Rec Center Fee.
2. All existing administratively-controlled fees attach to the first SCH assessed per student per term, with the exception of the \$45 building fee which has a pro-rata schedule. This is administratively more complicated to manage. It is recommended that this fee convert to the same fee structure (full fee attached to first SCH assessed per term) as all of the other mandatory fees.

The Incidental Fee proposal is developed by ASUO and does not run through the TFAB review. ASUO leadership has shared that they are proposing that the Incidental Fee increase \$12.50 per term from \$259.25 per term to \$271.75 per term (4.8%).

Honors College Differential Tuition

With the exception of the last few years, the practice at the UO has been to increase Clark Honors College Differential Tuition by the same rate as that proposed for undergraduate, resident tuition. The Honors College Differential Tuition is used by the college to support its operating budget which is primarily invested in faculty and staff. Like other budgets on campus, the costs in this budget increase each year in line with the general E&G fund cost drivers (e.g., salary costs, health care costs, retirement costs, etc.). The TFAB is recommending that the rates for the Honors College Differential Tuition be wrapped into the guaranteed tuition program and that the structure of the

rates follow that which is being proposed for resident, undergraduate tuition. This would result in the following charges:

- Continuing Students: \$927 per term (3% increase from FY2020). Continuing students would be guaranteed annual increases in the Honors College Differential Tuition of 3% per year for 4 years.
- New, Incoming Students: \$996.75 per term (10.75% increase from FY2020). This rate would be guaranteed not to change for five cohort years.

Business School Differential Tuition

The Lundquist College of Business is proposing an increase to the differential tuition charged to undergraduate students who take business classes. The current rate is \$20 per course and the proposal for FY2021 is to raise this to \$25 per course. The dean of the business school shared with the TFAB all of the investments that had been made with the existing differential tuition revenue, as well as the planned investments related to this increase. TFAB members asked many clarifying questions, but did not identify significant concerns related to this proposal. The TFAB is recommending that the proposed rate of \$25 per course for business school differential tuition be included in the guaranteed program for both new and current students and that this rate be locked for all students for the length of their guarantee.

Matriculation Fee

The practice at the UO is to have the matriculation fee increase at the same rate as resident tuition. As students only pay this fee once, it does not make sense to wrap it into the guaranteed tuition program. However, the new guaranteed tuition rate for residents is predicated on an assumption that if the institution had continued with a tuition program of annual tuition increases, resident tuition increases would have averaged 4.5% per year. Therefore, the recommendation is to increase the matriculation fee by 4.5%, from \$430 to \$449.35.

Other Costs of Education Reviewed

The TFAB reviewed major changes to proposed course fees, as well as projections on housing costs for FY2021. The group discussed a few specific course fees for which concerns existed and this feedback will be incorporated into the Special Fees, Fines and Penalties process for consideration.

University Housing presented its proposed room and board rates for FY2021 to the TFAB. Housing is proposing moderate increases to housing rates, with average rates going up less than 4%. These increases are to cover labor and maintenance cost increases. TFAB members discussed the

proposals and were generally supportive of the increases, particularly as the Residence Hall Association (student residence halls advisory group) was consulted about the budget and proposed room and board increases. Discussions by the TFAB focused on meal plan options and student interest in more low-cost meal plan options in addition to the current Carson Hall program. Specific feedback was noted around asking Housing to consider whether they could have a low-cost meal plan that is predominately focused on Carson Hall, but provides students with the opportunity to have a few meals per week at other dining venues on campus. University Housing's efforts to keep some room and board packages under \$10,000 per year were appreciated, particularly as these packages represent some of the most affordable housing options in the Pac-12 conference.

Tuition and Fee Policy Book

The TFAB reviewed draft proposed changes to the Tuition and Fee Policy book, including new language related to the new guaranteed tuition program, and had an opportunity to provide suggested edits and comments.

2020-21 ACADEMIC YEAR GRADUATE TUITION INCREASE PROPOSALS

Note: All rates are expressed according to the academic year.

	ACADEMIC YEAR		
	2019-20 Tuition	2020-21 Tuition	Tuition Pct Increase
GRADUATE (annual tuition at the plateau rate)			
COLLEGE OF DESIGN			
<i>Architecture & Interior Architecture</i>			
Resident	23,334.00	23,334.00	0.0%
Nonresident	33,984.00	33,984.00	0.0%
<i>Landscape Architecture</i>			
Resident	18,735.00	18,735.00	0.0%
Nonresident	29,985.00	29,985.00	0.0%
<i>Historic Preservation</i>			
Resident	17,586.00	17,586.00	0.0%
Nonresident	28,986.00	28,986.00	0.0%
<i>Art</i>			
Resident	17,241.00	17,241.00	0.0%
Nonresident	18,861.00	18,861.00	0.0%
<i>Sports Product Design ¹</i>			
Resident	34,719.00	35,016.00	0.9%
Nonresident	34,719.00	35,016.00	0.9%
<i>Planning, Public Policy, & Management</i>			
Resident	17,697.00	18,210.00	2.9%
Nonresident	27,960.00	28,770.00	2.9%
<i>History of Art and Architecture</i>			
Resident	16,698.00	17,022.00	1.9%
Nonresident	26,391.00	26,904.00	1.9%
COLLEGE OF ARTS AND SCIENCES			
<i>MA/Phd</i>			
Resident	14,958.00	15,417.00	3.1%
Nonresident	26,811.00	27,621.00	3.0%
<i>CAS Electrochemistry Masters Internship (EMIP)</i>			
Resident	NEW	15,012.00	-na-
Nonresident	NEW	15,012.00	-na-
<i>Online MS Program in Psychology</i>			
Resident	NEW	14,958.00	-na-
Nonresident	NEW	14,958.00	-na-
COLLEGE OF EDUCATION			
<i>Base</i>			
Resident	18,243.00	18,729.00	2.7%
Nonresident	26,127.00	26,856.00	2.8%
<i>Supervision</i>			
Resident	19,650.00	20,190.00	2.7%
Nonresident	27,534.00	28,317.00	2.8%
<i>Clinical</i>			
Resident	21,399.00	21,993.00	2.8%
Nonresident	29,202.00	30,039.00	2.9%
<i>DEd</i>			
Resident	18,243.00	18,729.00	2.7%
Nonresident	26,127.00	26,856.00	2.8%
SCHOOL OF JOURNALISM AND COMMUNICATION			
<i>MA/PhD</i>			
Resident	16,011.00	16,011.00	0.0%
Nonresident	25,164.00	25,164.00	0.0%
<i>Strategic Communication</i>			
Resident	17,739.00	17,739.00	0.0%
Nonresident	24,435.00	24,435.00	0.0%
<i>Multimedia</i>			
Resident	17,739.00	17,739.00	0.0%
Nonresident	24,435.00	24,435.00	0.0%

SCHOOL OF JOURNALISM AND COMMUNICATION (cont.)			
<i>Advertising and Brand Management</i>			
Resident	16,011.00	16,011.00	0.0%
Nonresident	25,164.00	25,164.00	0.0%
SCHOOL OF LAW			
<i>JD</i>			
Resident	35,604.00	38,088.00	7.0%
Nonresident	44,820.00	47,952.00	7.0%
<i>LLM</i>			
Resident	44,244.00	46,458.00	5.0%
Nonresident	44,244.00	46,458.00	5.0%
<i>CRES</i>			
Resident	21,897.00	22,653.00	3.5%
Nonresident	29,592.00	30,618.00	3.5%
COLLEGE OF BUSINESS			
<i>PhD</i>			
Resident	14,364.00	14,364.00	0.0%
Nonresident	24,057.00	24,057.00	0.0%
<i>MBA</i>			
Resident	29,235.00	29,235.00	0.0%
Nonresident	40,461.00	40,461.00	0.0%
<i>Accounting</i>			
Resident	19,527.00	19,917.00	2.0%
Nonresident	27,627.00	27,627.00	0.0%
<i>Finance</i> ²			
Resident	24,840.00	24,840.00	0.0%
Nonresident	32,565.00	32,565.00	0.0%
<i>Oregon Executive MBA</i> ³			
Resident	40,500.00	40,500.00	0.0%
Nonresident	40,500.00	40,500.00	0.0%
<i>Sports Product Management (Face-to-Face)</i> ⁴			
Resident	39,000.00	46,800.00	20.0%
Nonresident	45,000.00	46,800.00	4.0%
<i>Sports Product Management (Online)</i> ⁴			
Resident	31,416.00	33,426.00	6.4%
Nonresident	36,417.00	33,426.00	-8.2%
SCHOOL OF MUSIC AND DANCE			
<i>MA/PhD</i>			
Resident	14,808.00	15,024.00	1.5%
Nonresident	23,490.00	24,198.00	3.0%
KNIGHT CAMPUS			
<i>Industrial Internship Program</i> ⁵			
Resident	19,980.00	20,592.00	3.1%
Nonresident	19,980.00	20,592.00	3.1%

Notes:

- (1) Students in Sports Product Design pay Portland-based fees.
 - (2) The cost reported in the table for the Master's in Finance is for three terms of a four-term program.
 - (3) The cost reported in the table for the Executive MBA is for three terms of a six-term program.
Students in the program pay Portland-based fees.
 - (4) The cost reported in the table for the SPM (Face-to-Face) is for three terms of a five-term program and SPM (Online) is for three terms of a seven-term program.
Students in the SPM (Face-to-face) program pay Portland-based fees and SPM (Online) pay the Off-campus fee.
 - (5) Costs calculated at 12 credit hours. IIP students pay Eugene campus fees when they are enrolled on the Eugene campus and the Off-campus fee when they are enrolled off-site.
 - (6) Students will be charged an additional \$25 per credit hour for undergraduate courses taken in the Business School.
- Source: UO Office of Institutional Research.

Members of the 2019–2020 Tuition and Fee Advisory Board

Andy Marcus	Professor of Physical Chemistry
Doneka Scott	Vice Provost for Undergraduate Education and Student Success
Douglas Imaralu	Graduate student; Center on Diversity and Community (CoDaC) Research Assistant
Erica Daley	Associate Dean of Finance and Operations, School of Law
Hal Sadofsky	Divisional Dean of Natural Sciences and Associate Professor of Mathematics
Jackson Smith	Undergraduate student; Resident Hall Association President
Jamie Moffitt	Vice President for Finance and Administration & CFO; co-chair
Janet Woodruff-Borden	Executive Vice Provost for Academic Affairs
Jim Brooks	Associate Vice President for Student Services and Enrollment Management and Director, Student Financial Aid and Scholarships
JP Monroe	Director of Institutional Research
Kathie Stanley	Associate Vice President and Chief of Staff, Division of Student Life
Kevin Marbury	Vice President for Student Life; co-chair
Randy W. Kamphaus	Professor and Dean of the College of Education
Robin Clement	Director of the Master of Accounting Program and Senate Budget Committee member
Sabinna Pierre	ASUO President; undergraduate student
Stuart Laing	Director of Budget and Resource Planning
Tova Kruss	Undergraduate student; Student Health Advisory Committee (SHAC) member
Vanessa Robles	ASUO State Affairs Commissioner; undergraduate student

Guests at the TFAB meetings October 2019–February 2020

Debra Beck	Executive Director, University Health Center
Jessica Brewer	Undergraduate student, Residence Halls Association
Marcilynn Burke	Dean, School of Law
Debbie Davis	Undergraduate student, Residence Hall Association
Zack Demars	Undergraduate student, reporter for the <i>Daily Emerald</i>
Emily Fenster	Law Fellow, Office of the General Counsel
Keith Frazee	Assistant Vice President and Chief of Staff, Student Services and Enrollment Management
Michael Griffel	Assistant Vice President and Director of University Housing
James Ha	Undergraduate student, Resident Hall Association
Bill Harbaugh	Professor, Economics
Eric Howanietz	Assistant Editor, the <i>Student Insurgent</i>
Saul Hubbard	Media Relations & Communications Manager
Indigo Irving	Undergraduate student, ASUO Chief of Staff
Nyla Jamison	Undergraduate student, ASUO Vice President
Kay Jarvis	Director of Public Affairs and Issues Management
Andy Karduna	Associate Dean, Graduate School
Shelly Kerr	Director, University Counseling Center
Rocco Luiere	Assistant Vice Provost for Budget and Strategy, Associate Dean of Finance and Administration, College of Design
Aimée C. Marquez	Undergraduate Student, ASUO board member
Annika Mayne	Undergraduate Student, ASUO intern
Ella Meloy	Undergraduate Student, ASUO intern
Kate Mondloch	Interim Dean, Graduate School
Janet Mulkey	Non-traditional student, community member
Lynn Nester	Director, Physical Education and Recreation
Ryan Nguyen	Undergraduate student, reporter for the <i>Daily Emerald</i>
Sarah Nutter	Edward Maletis Dean, Lundquist College of Business
Kevin Reed	Vice President and General Counsel to the University
Shakina Sahid	Undergraduate student
Michael Schill	President
Lucy Schiller Novello	Undergraduate student, ASUO Tuition Insecurity Coordinator
Kezia Setyawan	Undergraduate student, ASUO Senator
Nathan Skarphol	Undergraduate student, Residence Hall Association
Lauren Stanfield	Director, Strategic Communication and Marketing
Madelyn Stellingwerf	Undergraduate student, photographer for the <i>Daily Emerald</i>
Roger Thompson	Vice President for Student Services and Enrollment Management
Sue Wieseke	Assistant Director for Finance, Physical Education and Recreation
Angela Wilhelms	University Secretary and Advisor to the President
Laurie Woodward	Director, Erb Memorial Union

Note: Five students attended the February 13th TFAB meeting; they left before names were confirmed.