

To: Michael Schill, President
From: Jamie Moffitt, Vice President for Finance and Administration and CFO, TFAB Co-Chair,
and Kevin Marbury, Vice President for Student Life, TFAB Co-Chair
Date: February 11, 2022
Re: Recommendations of the FY2022 Tuition and Fee Advisory Board (TFAB)
Cc: Patrick Phillips, Senior Vice President and Provost

Executive Summary

The Tuition and Fee Advisory Board (TFAB) is making the following recommendations related to tuition and mandatory fees:

- ***Incoming Cohort of New Undergraduate Students (2022 Tuition Cohort):***
 - ***Non-residents:*** The TFAB recommends that the guaranteed tuition rate, which will be locked for five years, be set at a rate that is 3.0% higher than that of the 2021 Tuition Cohort, and that, in total, administratively controlled mandatory fees, which will be locked for five years, be set at a rate that is 3.74% higher than the 2021 Tuition Cohort¹.
 - ***Residents:*** The TFAB recommends that the guaranteed tuition rate, which will be locked for five years, be set at a rate that is 4.5% higher than that of the 2021 Tuition Cohort, and that, in total, administratively controlled mandatory fees, which will be locked for five years, be set at a rate that is 3.74% higher than the 2021 Tuition Cohort².

With the guaranteed tuition program, the tuition and fee rates for incoming undergraduate students are locked for five years. The tuition and administratively controlled mandatory fee rates for current first-year and second-year undergraduate students are also locked for five years as part of the program. Tuition and administratively controlled mandatory fee rates for continuing undergraduate students (who started at the institution prior to summer 2020) will increase 3.0% per year for the next two years as previously authorized by the Board of Trustees in March of 2020.

- ***Graduate Students:*** The TFAB supports and includes for your consideration all of the proposed increases for graduate programs outlined herein. All of the proposed increases are 3.1% or less, with the exception of the law programs, which are discussed further in this memo.

¹ This rate is calculated after an appropriate adjustment has been made for the shifting of EMU funding from the Incidental fee to the Student Union Fee.

² This rate is calculated after an appropriate adjustment has been made for the shifting of EMU funding from the Incidental fee to the Student Union Fee.

This memo provides detailed information about these recommendations and is organized around the following topics:

- Tuition and Fee Advisory Board Process
- E&G Fund Budget and Financial Information
- FY23 Budget Assumptions
- Other Key Issues Related to Tuition and Fees
- Tuition Scenarios Considered
- Proposed Tuition Increase for Incoming 2022 Tuition Cohort of Undergraduate Students
- Proposed Graduate Tuition Rates
- Fee Increases for Administratively Controlled Mandatory Fees
- Matriculation Fee
- Clark Honors College Differential Tuition
- Other Costs of Education Reviewed
- Tuition and Fee Policy Book

Tuition and Fee Advisory Board Process

The FY22 Tuition and Fee Advisory Board (TFAB) process launched with five students (one graduate student and four undergraduate students, including the Associated Students of the University of Oregon [ASUO] president and the ASUO finance director), faculty, deans, vice presidents, vice provosts, and administrative staff engaged in budgeting, business affairs, institutional research, and financial aid. A list of TFAB members is included at the end of this memo (Appendix C).³ Other students, faculty, and staff participated in TFAB meetings as guests throughout the year.

The TFAB met nine times between October 2021 and February 2022. All meetings were open to the public. Fall term meetings were held in person with the option for virtual participation. In winter term, TFAB members were increasingly participating in meetings virtually, which led to some challenges with communication between the in-person and online participants. As a result, the last three meetings of winter term were held virtually using Zoom technology. Guests regularly joined the discussions, including students and a reporter from the *Daily Emerald*. A full list of guests is included at the end of this memo (Appendix D).

Fall 2021 meetings focused on the TFAB charge, historical and comparative information, the university budget, the impact of COVID-19 on institutional finances, mechanisms by which moneys are appropriated by the Legislative Assembly to the Higher Education Coordinating Commission (HECC) for allocation to public universities, the guaranteed tuition program, cost drivers, long-term budget projections, and a plan for cost management. The fall meetings focused on helping TFAB members understand foundational budget information; members who were unable to attend the regularly scheduled meetings were offered make-up sessions with TFAB co-chairs to ensure all members had access to all of the critical background information and training. Winter meetings covered housing rates, proposals related to administratively controlled mandatory fees, proposed course fees and orientation fees, graduate tuition proposals, tuition rates for the new cohort of undergraduate students, as well as planning for and discussing feedback from the student forum on tuition. The TFAB also spent time discussing the trends in domestic, international, and transfer

³ Due to scheduling issues, Senior Associate Dean Davis replaced Dean Nutter on the TFAB in January 2022. One undergraduate student member withdrew from the TFAB in mid-January due to unforeseen circumstances.

student recruitment and enrollment, how proposed tuition and fee increases compare to other schools, economic pressures including labor costs and inflation, and the financial challenges students face in paying for higher education.

In addition to the nine TFAB meetings, the TFAB and ASUO co-hosted a virtual student forum on the tuition-setting process in mid-January. The forum included a presentation on anticipated cost drivers for the coming year, an overview of the guaranteed tuition program, and information on administratively controlled mandatory fees. Following the presentation, attendees had the opportunity to participate in small-group discussions facilitated by TFAB members in breakout rooms. Feedback from the small-group discussions was discussed by TFAB members at a subsequent meeting. A second student forum, which you will host, is scheduled for Tuesday, February 15.

The university's tuition website (<https://tuition.uoregon.edu/>) was kept updated throughout the 2021-22 TFAB deliberation process, with the meeting schedule posted weeks in advance. In addition to the schedule, the website provided links to meeting agendas and all relevant documents and data that the TFAB considered during deliberations. Meeting summaries from each TFAB session were also posted. Finally, the website provided updated 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 (AAU) comparator schools.

As you know, the UO welcomed its second undergraduate tuition cohort in summer/fall 2021 as part of the guaranteed tuition program for undergraduate students. Tuition and administratively controlled mandatory fee rates for students in the 2020 and 2021 tuition cohorts are guaranteed and will not change for five years. The program locks in annual increases in tuition and administratively controlled mandatory fees at 3.0% per year for all other current undergraduate students who started prior to summer 2020. This year, the TFAB focused on developing a recommended tuition rate for the incoming cohort of undergraduate students. The rate that is set for these students will then be locked for a period of five years and will not increase.

E&G Fund Budget and Financial Information

At the last meeting of the Board of Trustees (December 2021), the projections for the FY22 Education and General (E&G) fund, which covers the majority of the operations of the academic and non-auxiliary administrative functions of the university, forecast a deficit, with projected revenues unable to cover projected expenditures by approximately \$3.7 million. Those projections appear to be improving due to strong student enrollment and reduced compensation costs attributable to hiring challenges.

However, the ongoing uncertainty about the impacts of Covid-19 on student retention, campus activity levels, critical hiring and the institution's finances, combined with the specter of rising inflation make it challenging to predict the financial position of the institution for next year, FY23. In its deliberations, the TFAB considered anticipated FY23 cost drivers (shown below), as well as projected student enrollment and estimated state appropriations.

potential future transfer students) are at historic lows, and national projections for undergraduate students are trending downward. The size of the incoming cohort will dramatically impact the UO financial position. Because of the uncertainty, the TFAB considered a broad range of scenarios where first-year enrollment for various groups fluctuated from 45% to 110% of recruitment targets.

State appropriations: Currently the university receives approximately \$85.8 million in operating support from the state in the E&G fund. As FY23 will be the second year of the biennium, assuming that the state does not implement any off-cycle budget cuts, the size of the Public University Support Fund (PUSF) is set. The university's allocation of these funds, however, is dependent not only on university activity levels, but also enrollment and graduation rates at the other universities in Oregon. While this makes it difficult to accurately project the FY23 allocation, the TFAB used the Higher Education Coordinating Commission's (HECC's) most recent set of projections, which estimated that the UO allocation would increase by \$4 million in FY23.

Summer Tuition Revenue: Due to the pandemic, there was a significant drop in summer school enrollment in the summer of 2021. This makes sense given that most summer school courses were being offered remotely, while fall 2021 classes were scheduled to be mainly conducted in person. For this reason, in discussions of the overall E&G fund budget, the TFAB assumed a rebound of summer 2022 tuition revenue of \$1.5 million, which would place it at a more traditional level of activity.

Other Key Issues Related to Tuition and Fees

In addition to the budget and financial issues outlined above, TFAB members discussed a number of key issues related to tuition rates and fees. These included:

- (1) ongoing financial challenges faced by students and their families,
- (2) market conditions and the increasing costs of higher education,
- (3) benefits of guaranteed tuition, and
- (4) the necessity of maintaining a funding gap.

Financial challenges faced by students and families: TFAB members noted the continued challenges faced by students and families entering the third year of a global pandemic. In particular, the group acknowledged issues around health scares, increased emotional strain and mental health challenges, and the increasing cost of living for students and families in Oregon and beyond.

Market conditions and the increasing costs of higher education: Over a series of meetings, TFAB members discussed the university's resident and non-resident tuition rates in relation to comparator schools. The discussions were particularly important because the UO resident undergraduate tuition and mandatory fees for continuing students who started before 2020 as well as for the 2020 and 2021 tuition cohorts are slightly higher than the average rate for AAU public universities. As a result, the group spent a great deal of time discussing the potential impact of further raising tuition and fees in a market of rapidly increasing higher education costs and wider inflationary pressures, and more competitively priced comparator schools. The TFAB expressed concern at raising the rates too high in relation to other comparator schools.

Additionally, the TFAB examined the various factors contributing to the increasing costs of higher education. These include staffing levels and the labor market, as well as inflation, which affects employee salaries, wages, and benefits, that make up the bulk of the Education and General fund budget. TFAB members spent time discussing the need to cover the costs on the institution side

while realizing that the increasing price of higher education places significant burdens on students not on the PathwayOregon program or receiving financial aid.

During discussions about the economy and labor market, some concern was expressed about the risks of large budget gaps over the next several years if inflation does not come down as rapidly as hoped, and at least one committee member therefore felt that larger tuition increases should at least be considered as a way to protect the university fiscally. The point was made that students/parents may well be willing to pay more than at some other schools in order to lock in the guaranteed rate for five years. It was noted that the guarantee has a lot of added value, particularly during times of high inflation or inflationary uncertainty.

Benefits of guaranteed tuition: Throughout the discussions about tuition rates, TFAB members noted the benefits of the UO guaranteed tuition program, which offers incoming undergraduate students a fixed rate of tuition and fees that is guaranteed for five years. In an inflationary economy, this transparency and predictability should provide some much-needed certainty regarding the financial costs of undergraduate education for prospective students and their families.

Funding gap: Over a number of meetings, TFAB members discussed the realities of a funding gap in FY23 and the short- and long-term impacts on the university's budget. Considering the various economic pressures, scenarios for student recruitment and enrollment, the increasing need to provide scholarships, and the overall desire to offer quality higher education at an affordable price to resident and non-resident students, the TFAB examined scenarios to close the funding gap. Members discussed the need to recruit and retain faculty and staff, and provide the wide-ranging educational and health services needed to support students and ensure overall academic success and career readiness while maintaining an affordable price point. As such, TFAB members noted that it would place significant and potentially unmanageable financial burdens on incoming students and their families to raise tuition rates to try to close the entire projected E&G funding gap in FY23.

Tuition Scenarios Considered

Given all of these issues, the TFAB reviewed and discussed a broad range of tuition rate scenarios for new undergraduate students entering the UO. Under the guaranteed tuition program, rates would be guaranteed for the incoming 2022 Tuition Cohort for five years. In the discussions of scenarios, the following factors were considered, along with differing assumptions for enrollment, FY22 budget shortfall, and tuition rates for resident and non-resident students:

- new state appropriations: \$4.0 million;
- summer return to pre-Covid levels: \$1.5 million;
- estimated non-recurring COVID-19 expense impacts: \$10 million;
- cost drivers: \$20.1 million; and
- additional undergraduate recruitment investment in fee remissions (scholarships): \$3.9 million.

The TFAB considered the following scenarios:

Tuition Rates		% Target Enrollment First-Year Class			% Target Transfer Enrollment		FY22 projected budget shortfall	Net Budget Gap
New students rate guaranteed for 5 years (% increase & resulting \$ cost per student credit hour)	Resident	Non- resident	Int'l	Resident Transfer	Non- Resident Transfer			
						Resident	Non- resident	
3.0% \$274.06	3.0% \$870.17	100	100	100	100	100	(\$3.7m)	(\$7.08m)
2.5% \$272.73	2.5% \$865.95	100	100	100	100	100	(\$3.7m)	(\$7.685m)
2.5% \$272.73	3.0% \$870.17	100	100	100	100	100	(\$3.7m)	(\$7.196m)
3.0% \$274.06	2.5% \$865.95	100	100	100	100	100	(\$3.7m)	(\$7.536m)
3.0% \$274.06	3.5% \$874.40	100	100	100	100	100	(\$3.7m)	(\$6.558m)
3.5% \$275.39	3.5% \$874.40	100	100	100	100	100	(\$3.7m)	(\$6.409m)
3.5% \$275.39	3.0% \$870.17	100	100	100	100	100	(\$3.7m)	(\$6.898m)
4.50% \$278.05	3.0% \$870.17	100	100	100	100	100	(\$3.7m)	(\$6.6m)
4.50% \$278.05	3.0% \$870.17	100	105	100	100	100	(\$3.7m)	(\$2.336m)
4.50% \$278.05	3.0% \$870.17	100	100	100	100	100	-	(\$2.923m)
4.50% \$278.05	3.0% \$870.17	100	105	100	100	100	-	(\$1.341m)
4.50% \$278.05	3.0% \$870.17	100	105	45	100	100	-	(\$3.44m)
4.50% \$278.05	3.0% \$870.17	100	105	70	100	100	-	(\$1.27m)
4.50% \$278.05	3.0% \$870.17	100	103	45	100	100	-	(\$5.15m)
4.50% \$278.05	3.0% \$870.17	100	103	70	100	100	-	(\$2.97m)
4.50% \$278.05	3.0% \$870.17	95	103	70	100	100	-	(\$4.20m)
4.50% \$278.05	3.0% \$870.17	100	102	70	95	95	-	(\$4.495m)

Tuition Rates		% Target Enrollment First-Year Class			% Target Transfer Enrollment		FY22 projected budget shortfall	Net Budget Gap
New students rate guaranteed for 5 years (% increase & resulting \$ cost per student credit hour)	Resident	Non- resident	Int'l	Resident Transfer	Non- Resident Transfer			
	Resident	Non- resident						
4.50% \$278.05	3.0% \$870.17	100	100	73	100	100	-	(\$5.27m)
4.50% \$278.05	3.0% \$870.17	100	100	65	100	100	-	(\$5.966m)
4.75% \$278.72	3.0% \$870.17	98	103	65	100	100	-	(\$3.824m)
5.0% \$279.38	5.0% \$887.07	98	103	65	100	110	-	(\$1.112m)
5.0% \$279.38	5.0% \$887.07	99	103	45	100	110	-	(\$2.639m)
4.75% \$278.72	4.75% \$884.96	99	103	45	100	110	-	(\$2.953m)
4.75% \$278.72	4.75% \$884.96	99	101	70	100	100	-	(\$3.167m)
4.75% \$278.72	4.75% \$884.96	99	100	70	100	100	-	(\$4.035m)
4.75% \$278.72	3.0% \$870.17	99	103	45	100	110	-	(\$4.639m)
4.75% \$278.72	3.0% \$870.17	99	103	45	90	110	-	(\$5.302m)
4.50% \$278.05	3.0% \$870.17	100	102	65	97	97	-	(\$4.662m)
4.50% \$278.05	3.0% \$870.17	100	104	65	97	97	-	(\$2.956m)
4.50% \$278.05	3.0% \$870.17	100	104	50	97	97	-	(\$4.260m)
4.50% \$278.05	3.25% \$872.29	100	102	65	97	97	-	(\$4.421m)
4.50% \$278.05	3.50% \$874.40	100	102	65	97	97	-	(\$4.180m)
4.50% \$278.05	3.0% \$870.17	100	102	65	97	97	-	(\$4.661m)

Proposed Tuition Increase for Incoming 2022 Tuition Cohort of Undergraduate Students

The TFAB recommends the following guaranteed tuition rates for the 2022 Tuition Cohort of undergraduate students:

- **Resident tuition:** The TFAB recommends the guaranteed resident rate for the 2022 Tuition Cohort be set at \$278.05 per student credit hour (4.5% above the 2021 Tuition Cohort 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 \$12,512.25—for five cohort years.
- **Non-resident tuition:** The TFAB recommends the guaranteed non-resident rate for the 2022 Tuition Cohort be set at \$870.17 per student credit hour (3.0% above the 2021 Tuition Cohort rate). This tuition rate is also guaranteed for five years and will not increase during that time. Annual full-time tuition for new non-resident undergraduates will be \$39,157.65—guaranteed for five cohort years.

Proposed Graduate Tuition Rates

Deans were asked to provide their recommendations for graduate tuition rates for FY23, based on market rates and pricing relevant to their specific degrees and budget situation. The graduate tuition rates were reviewed and discussed by the TFAB during multiple meetings in winter term. There are over 55 separate tuition rates for UO graduate programs. With the exception of programs in the School of Law (Law hereafter), proposed graduate tuition increases range from 0% to 3.1%. A summary of the proposed tuition rates for the graduate programs is included at the end of this memo (Appendix B). The TFAB held a separate session with the dean of Law to discuss proposed FY23 tuition rates.

School of Law

Law is proposing 5.0% increases for resident and non-resident students in its Juris Doctorate (JD), Master of Laws (LLM), and Conflict and Dispute Resolution Master's programs. During a discussion of the proposals with the TFAB, Dean Burke explained that the increases are needed to maintain program quality, cover rising operational costs, and continue to invest in the success of the students. For example, additional staffing to support student success—first-year workshops, tutoring, and academic and career advising—across all programs. Dean Burke also shared the school's success in lowering its discount rate in recent years, and the number of students currently receiving scholarships. The TFAB members discussed the potential impact that the proposed price increase could have on market competitiveness, as well as the financial challenges the increases would present to existing and incoming law students. The TFAB was generally supportive of the proposed increases by Law.

Sports Product Design MS Program

The Sports Product Design (SPD) MS program located in Portland proposes amending their tuition model to a flat fee structure, with a tuition guarantee. The SPD tuition model was updated in 2018 and the program managers intended it to be set up with a flat fee structure; however, it was instead set up with a tuition plateau between 9-16 credits. The SPD program is currently marketed and communicated to applicants and incoming students as a flat-fee model. SPD is a full-time MS program with a prescribed course load and no part-time students. As there are no part-time students

in the program and applicants and students already believe the program has a flat fee structure, movement to a flat rate will not result in either a perceived or actual increase for the students.

The TFAB recommends that the graduate and Law recommendations be adopted.

Fee Increases for Administratively Controlled Mandatory Fees

The TFAB reviewed the proposals for administratively controlled mandatory fees, with the exception of the Incidental Fee, which runs through the ASUO process. Administratively controlled mandatory fees are part of the guaranteed tuition program—the rates that are set for the incoming 2022 Tuition Cohort of undergraduate students will be locked for five years. Fee rates paid by current first-year and second-year students are already locked for five years and will not change.

As a result, the TFAB only needed to consider FY23 rates for the following groups of students:

- incoming cohort of undergraduate students,
- continuing undergraduate students (those who started at the university prior to the summer of 2020),⁴ and
- graduate students.

Each unit proposing increases to administratively controlled mandatory fees presented these increases to the TFAB, giving members the opportunity to ask questions and discuss the proposals. TFAB members were generally supportive of the mandatory fee increases, understanding the intense labor pressures and other cost increases facing all parts of the university. TFAB members expressed support for important investments in health services, technology infrastructure, recreation, and student union services. Members acknowledged the efforts to keep increases as low as possible while continuing to offer high-quality services to continuing and incoming students. Note that the fees for the new, incoming undergraduate students (2022 Tuition Cohort) will be locked for five years under the guaranteed tuition program.

Below is a brief summary of key issues noted about each proposal.

Building Fee: No increase

Health Service Fee: The proposed increase is 3.6% for graduate students and undergraduates who started before summer 2020 (\$8.50 per term) and 4.13% for new, incoming undergraduate students (\$9.75 per term). The increase is an attempt to respond to the growing need for health services among students and is reflective of the efforts by University Health Services to manage labor costs and general expenses while working to provide a broad spectrum of services, including mental health services.

⁴ As part of the guaranteed tuition program for undergraduate students who started prior to the summer of 2020, the annual total increase in administratively controlled mandatory fees was locked in at 3.0% per year. The TFAB, however, reviews how that 3% is allocated each year between fees.

Recreation Center Fee: The proposed increase varies by student group.

- Incoming undergraduate cohort: 4.14% (\$5.50 per term) – this rate will be locked for five years.
- Continuing undergraduates who started before summer 2020: 2.95% (\$3.50 per term)
- Graduate students: 2.89% (\$3.50 per term)

The proposed increases aim to cover cost-of-living allowance (COLA) increases and a planned increase in the minimum wage, which affects the student employee labor force at the Recreation Center. The increases also help to offset the center’s lack of revenue from conferences and locker fees resulting from the ongoing pandemic.

Student Union Fee:

Following extensive discussions between the Associated Students of the University of Oregon (ASUO) and the Division of Student Life, an agreement was reached to transition the Erb Memorial Union (EMU) off the Incidental Fee (I-Fee). EMU funding obligations require more of each year’s I-Fee increase, which reduces the available funds for other ASUO programs and services. As such, starting in FY23 funding for the EMU previously covered by the I-Fee will be moved to the Student Union Fee.

The guaranteed tuition cohorts of 2020 and 2021 and continuing undergraduates who started before 2020 will see no changes in their locked administratively controlled fees as a result of this transition—revenue will be moved to the appropriate unit by budget transfer after fees are collected.

Current and incoming graduate students and incoming undergraduate students will pay mandatory fees reflecting the new agreement, meaning the Student Union Fee will be higher than last year but will be offset by the lower Incidental Fee. The percentage increase across all mandatory fees is similar to past years. In Appendix A you will find the memo with more details that was provided to the TFAB.

The FY2022 Student Union fee rate has been adjusted for graduate students and new, incoming undergraduate students, to reflect the agreement outlined above. As described, there is no adjustment for undergraduate students who started before summer 2020 or for undergraduates whose fees are already locked as part of the tuition guarantee. After the adjustment, the proposed Student Union increase varies by student group, as follows:

- Incoming undergraduate cohort: 4.06% (\$8.75 per term) – this will be locked for five years
- Continuing undergraduates: 3.13% (\$2.50 per term)
- Graduate students: 3.03% (\$6.50 per term)

The proposed increases to the Student Union Fee will help the EMU manage the same wage and labor pressures faced by the rest of the university and the wider labor market. The transition of the EMU from the I-Fee to the Student Union Fee should make it easier for new and existing students to understand the resources being invested in the student union.

Technology Fee: The proposed increase to the technology fee is \$1.50 per term, which represents a 2.91% increase for all groups of students. This is only the second increase since 2017 and will be used for crucial investments in cybersecurity tools, mission-critical software, and infrastructure

replacement as technology ages. The cost of products and services in this area are facing the same inflationary pressures as those in other areas.

Summary: Graduate students will see the total of all administratively controlled mandatory fees increase by 3.0% for FY23. Continuing undergraduate students who started prior to summer of 2020 will see the total of all administratively controlled mandatory fees increase by 3.0%. The incoming 2022 Tuition Cohort will have a fee increase of 3.74% compared to the rate of the previous cohort. For the incoming cohort, the fee rate will be locked in for five years as part of the guaranteed tuition program. Current first-year and second-year students will see no increase to administratively controlled mandatory fees.

The following is a summary of proposed rates for existing mandatory fees for FY2023:

Administratively Controlled Mandatory Fees	All Graduate Students				Undergraduate Students Who Started Before Summer 2020			New, Incoming Undergraduate Students (2022 Cohort) Locked Fees				
	FY2022		FY2023		FY2022		FY2023		2021 Tuition Cohort		2022 Tuition Cohort	
	Fee	Adjusted Fee Rate FY2022	Fee	% Increase	Fee	Fee	% Increase	Fee	Adjusted Fee Rate FY2022	Fee	% Increase	
Building Fee	\$ 45.00	-	\$ 45.00	0.00%	\$ 45.00	\$ 45.00	0.00%	\$ 45.00	-	\$ 45.00	0.00%	
Health Service Fee	\$ 236.25	-	\$ 244.75	3.60%	\$ 236.25	\$ 244.75	3.60%	\$ 236.25	-	\$ 246.00	4.13%	
Rec Center Fee	\$ 121.25	-	\$ 124.75	2.89%	\$ 118.50	\$ 122.00	2.95%	\$ 133.00	-	\$ 138.50	4.14%	
Student Union Fee	\$ 80.00	\$ 214.00	\$ 220.50	3.03%	\$ 80.00	\$ 82.50	3.13%	\$ 81.75	\$ 215.75	\$ 224.50	4.06%	
Tech Fee	\$ 51.50	-	\$ 53.00	2.91%	\$ 51.50	\$ 53.00	2.91%	\$ 51.50	-	\$ 53.00	2.91%	
Total ACMF	\$ 534.00	\$ 668.00	\$ 688.00	2.99%	\$ 531.25	\$ 547.25	3.01%	\$ 547.50	\$ 681.50	\$ 707.00	3.74%	
<i>Incidental Fee</i>	\$ 268.25	\$ 134.25	\$ 138.25	2.98%	\$ 268.25	\$ 272.25	1.49%	\$ 268.25	\$ 134.25	\$ 138.25	2.98%	
All Mandatory Fees	\$ 802.25	\$ 802.25	\$ 826.25	2.99%	\$ 799.50	\$ 819.50	2.50%	\$ 815.75	\$ 815.75	\$ 845.25	3.62%	

Incidental Fee: The Incidental Fee (I-Fee) proposal is developed by the ASUO and does not run through the TFAB review process.⁵

Matriculation Fee

The matriculation fee paid by all new students is traditionally increased at the same rate as the increase to undergraduate resident tuition. We are recommending that the institution continue this practice in FY23. Students only pay the matriculation fee once, in their first term.

Clark Honors College Differential Tuition

As with the matriculation fee, the differential tuition paid by Clark Honors College students is traditionally increased at the same rate as the increase to undergraduate resident tuition. For the 2022 Tuition Cohort, the Clark Honors College is instead recommending a 0.5% increase from the 2021 cohort rate. This would result in a tuition charge of \$1,007.58 per term for new, incoming students. As the Honors College differential tuition is part of the guaranteed tuition program, the rate charged to the entering cohort of students will be locked for five years.

⁵ The language in the ASUO recommendation was for a 3% or \$4.00 increase. The numbers reflect a 2.98% increase; the difference is accounted for in rounding.

Other Costs of Education Reviewed

The TFAB reviewed major changes to proposed course fees and other fees (e.g., orientation fees), as well as projections on housing costs for FY23. The group discussed some specific course fees where questions arose; this feedback will be incorporated into the Special Fees, Fines, and Penalties process for consideration.

University Housing presented to the TFAB the proposed room and board rates, including a summary of percentage increases, for FY23. Housing rate increases vary by room type and meal plan, but the overall average increase is about 4.0%. This is slightly higher than last year's increase of 3.5% but still keeps UO housing costs one of the lowest in the Pac-12. The TFAB discussed the current labor shortages in UO Housing, recent contract negotiations that increased minimum wages and included cost-of-living allowance increases, and the potential long-term impact of increasing labor costs overall. TFAB members discussed the housing proposal and were generally supportive, particularly considering the efforts being made to address student food insecurity issues with affordable Housing and Dining packages and efforts to keep housing rates as affordable as possible.

Tuition and Fee Policy Book

Delays in the finalization of the Tuition and Fee Policy Book mean that the TFAB did not have the opportunity to review proposed changes to the policy book during scheduled winter meetings. TFAB members will be given the opportunity to provide suggested edits and comments on a proposed updated draft of the Tuition and Fee Policy Book later in February.

Appendix A: Memo on the Transition of the EMU Budget from the I-Fee to the Student Union Fee

Updated Fee Request to TFAB

Impact of transition of EMU budget from the Incidental Fee to the Student Union Fee

After extensive discussions, Vice President for Student Life Kevin Marbury and ASUO President Isaiah Boyd reached an agreement to transition the Erb Memorial Union (EMU) off the Incidental Fee (I-Fee). This change will reduce the Incidental Fee and increase the Student Union Fee by an amount per student per term needed to offset the EMU’s current Incidental Fee allocation. President Schill, who must approve the change, has indicated he is in support of the change and asked us to proceed.

This change is necessary due to the fact that EMU funding obligations are requiring more and more of each year’s Incidental Fee increase go to the EMU, which dramatically reduces available funds for other ASUO programs and services. By moving the EMU to the Student Union Fee, a more moderate increase in the I-Fee nets more money for ASUO programs and services.

By way of example, the current Incidental Fee is \$268.25. In order to meet reserve, overhead and current service level (CSL) obligations, the ASUO must raise the Incidental Fee by 3.5% and after the EMU is funded, a 3.5% increase leaves only \$32,593 to allocate for the rest of the ASUO budget. On the other hand, if the EMU were not being funded by the Incidental Fee, that same 3.5% increase would generate \$301,664 to allocate on programs and services.

The current model requires the ASUO to raise the I-Fee higher and higher in order to cover both the EMU and have enough money left for other programs and services. The chart below shows that by moving the EMU to the Student Union Fee, a more moderate increase in the I-Fee nets more money.

With EMU on Incidental Fee	I-Fee % Increase	Amount generated by raising I-Fee	\$ available to allocate beyond the EMU
\$452,911 (EMU Dec Request)	5.0%	\$861,096	\$273,872
	4.0%	\$688,877	\$113,019
	3.5%	\$602,767	\$32,593
	3.0%	\$516,658	-\$47,834
Without EMU on Incidental Fee	I-Fee % Increase	Amount generated by raising I-Fee	\$ available to allocate beyond the EMU
	5.0%	\$430,949	\$430,949
	4.0%	\$344,759	\$344,759
	3.5%	\$301,664	\$301,664
	3.0%	\$258,570	\$258,570

This change will be implemented beginning with the 22-23 academic year as follows:

Guaranteed Tuition Undergraduate Cohort 2020 (FY21) and 2021 (FY22)

As the name suggests, we will not change the Administratively Controlled Mandatory Fees (ACMF) established and previously approved for the first two Guaranteed Tuition cohorts. However, in order to correctly fund both the EMU and ASUO budgets, we will make a funding adjustment after the fees have been collected in BANNER by moving some funds collected under the Incidental Fee to the EMU while the rest go to the ASUO.

The per-student-per-term amount of the current Incidental Fee that supports the EMU budget is \$134. That amount will be locked in for both cohorts. The Incidental Fee has and can be increased going forward, as it is not part of the guaranteed tuition program. For budgeting and calculation purposes, the current Incidental Fee of \$268.25 will be reduced by \$134.00 to \$134.25 to reflect the post-transition starting point. Once the ASUO decides on its fee recommendation for next year, the *ASUO portion* of Incidental Fee will increase accordingly. Again, the students in these two cohorts will not see any change on the administratively controlled fees; we will move the revenue to the appropriate unit once fees are collected through a budget transfer in BANNER.

The chart below shows this in more detail. Future amounts in the tables are a projection, for illustration purposes. Projections in the charts below assume a 3% annual increase for the I-Fee. The exact increase will be determined each year through ASUO budgeting process.

Fall 2020 Cohort (FY21)					
Fee	FY2021	FY2022	FY2023	FY2024	FY2025
Building	\$ 45.00	\$ 45.00	\$ 45.00	\$ 45.00	\$ 45.00
Health Service	\$ 233.25	\$ 233.25	\$ 233.25	\$ 233.25	\$ 233.25
Rec Center	\$ 120.88	\$ 120.88	\$ 120.88	\$ 120.88	\$ 120.88
Student Union	\$ 78.54	\$ 78.54	\$ 78.54	\$ 78.54	\$ 78.54
Technology	\$ 50.00	\$ 50.00	\$ 50.00	\$ 50.00	\$ 50.00
Total ACMF	\$ 527.67	\$ 527.67	\$ 527.67	\$ 527.67	\$ 527.67
Incidental Fee	\$ 271.75	\$ 268.25	\$ 272.25	\$ 276.40	\$ 280.67
Locked I-Fee Amount in for EMU		\$ 134.00	\$ 134.00	\$ 134.00	\$ 134.00
Annual I-Fee Amount (goes up)		\$ 134.25	\$ 138.25	\$ 142.40	\$ 146.67
Total All Fees	\$ 799.42	\$ 795.92	\$ 799.92	\$ 804.07	\$ 808.34

Fall 2021 Cohort (FY22)					
Fee	FY2022	FY2023	FY2024	FY2025	FY2026
Building	\$ 45.00	\$ 45.00	\$ 45.00	\$ 45.00	\$ 45.00
Health Service	\$ 236.25	\$ 236.25	\$ 236.25	\$ 236.25	\$ 236.25
Rec Center	\$ 133.00	\$ 133.00	\$ 133.00	\$ 133.00	\$ 133.00
Student Union	\$ 81.75	\$ 81.75	\$ 81.75	\$ 81.75	\$ 81.75
Technology	\$ 51.50	\$ 51.50	\$ 51.50	\$ 51.50	\$ 51.50
Total ACMF	\$ 547.50	\$ 547.50	\$ 547.50	\$ 547.50	\$ 547.50
Incidental Fee	\$ 268.25	\$ 272.25	\$ 276.40	\$ 280.67	\$ 285.07
Locked I-Fee	\$ 134.00	\$ 134.00	\$ 134.00	\$ 134.00	\$ 134.00
Annual I-Fee	\$ 134.25	\$ 138.25	\$ 142.40	\$ 146.67	\$ 151.07
Total All Fees	\$ 815.75	\$ 819.75	\$ 823.90	\$ 828.17	\$ 832.57

Undergraduate Students Who Started Before 2020

Continuing undergraduates who started at the UO before 2020 also have a guarantee. They were promised Administratively Controlled Mandatory Fees would not increase more than 3% a year. This agreement will also stay in place. The same methodology (splitting the I-Fee into two parts, one locked in (EMU portion) and one that could increase (Incidental Fee portion). As we noted above, the students in this group will not see any change on the Administratively Controlled Mandatory Fees; we will move the associated revenue to the appropriate unit once fees are collected through a budget transfer in BANNER. The chart below shows this in more detail. Projections in the charts below assume a 3% annual increase for the I-Fee. Exact increase will be determined each year through ASUO budgeting process.

	FY2022	FY2023	% Increase
Fee	Rates	Rates	over Prior Year
Building	\$ 45.00	\$ 45.00	0.00%
Health Service	\$ 236.25	\$ 244.75	3.60%
Rec Center	\$ 118.50	\$ 122.00	2.95%
Student Union	\$ 80.00	\$ 82.50	3.13%
Technology	\$ 51.50	\$ 53.00	2.91%
Total AMCF	\$ 531.25	\$ 547.25	3.01%
Incidental Fee	\$ 268.25	\$ 272.25	1.49%
Locked I-Fee	\$ 134.00	\$ 134.00	0.00%
Annual I-Fee	\$ 134.25	\$ 138.25	2.98%
All Mandatory Fees	\$ 799.50	\$ 819.50	2.50%

Graduate Students

Current and incoming graduate students will pay Mandatory Fees that reflect this transition. The Student Union Fee will be higher than last year but offset by the lower Incidental Fee (new students may not notice this). Once we reset the two fees to the transition rate (the current Student Union Fee plus \$134 and current Incidental Fee minus \$134) we then applied a 3.03% increase to the Student Union Fee for graduate students. This is 0.1% lower than the percentage previously presented by Kevin Marbury to TFAB (3.13%). While the shifting of fees results in a sizable percentage increase on the Student Union Fee and the Administratively Controlled Mandatory Fees, the percentage increase across all Mandatory Fees is similar to past years. Projections in the chart below assume a 3% annual increase for the I-Fee. The exact increase will be determined each year through ASUO budgeting process.

	FY2022	Adj Fee	FY2023	% Increase
Fee	Rates	Rates	Projected Rates	over Prior Year
Building	\$ 45.00	\$ 0.00	\$ 45.00	0.00%
Health Service	\$ 236.25	\$ 0.00	\$ 244.75	3.60%
Rec Center	\$ 121.25	\$ 0.00	\$ 124.75	2.89%
Student Union	\$ 80.00	\$ 214.00	\$ 220.50	3.03%*
Technology	\$ 51.50	\$ 0.00	\$ 53.00	2.91%
Total ACMF	\$ 534.00	\$ 668.00	\$ 688.00	2.99%
* Transition rate calculation increase from \$80 to \$220.50 is 175.63%				

<i>(cont. from above)</i>	FY2022	Adj Fee	FY2023	% Increase
Fee	Rates	Rates	Rates	over Prior Year
Incidental Fee	\$ 268.25	\$ 134.25	\$ 138.25	2.98%**
<i>**Transition rate calculation increase from \$268.25 to \$134.25 is -48.46%</i>				
All Mandatory Fees	\$ 802.25		\$ 826.25	3.00%

Total ACMF (before adjustment)	\$ 534.00	\$ 550.00	3.00%
Total ACMF (after adjustment)	\$ 534.00	\$ 688.00	28.84%

Incoming Guaranteed Tuition Undergraduate Cohort 22 (FY23)

Incoming undergraduate students will also pay Mandatory Fees that reflect this transition. Again, the Student Union Fee will be higher than last year but offset by the lower Incidental Fee (new students may not notice this). Once we reset the two fees to the transition rate (the current Student Union Fee plus \$134 and current Incidental Fee minus \$134) we then applied a 4.06% increase to the new cohort. This is 0.53% lower than the percentage increase previously presented by Kevin Marbury to TFAB (4.59%). While the shifting of fees results in a sizable percentage increase on the Student Union Fee and the Administratively Controlled Mandatory Fees, the percentage increase across all Mandatory Fees is similar to past years. The chart below shows this in more detail.

	2021 Tuition Cohort (FY22)	Adj Fee	2022 Tuition Cohort (FY23)	% Increase
	Rates	Rates	Rates	over Prior Year
Building	\$ 45.00	\$ 0.00	\$ 45.00	0.00%
Health Service	\$ 236.25	\$ 0.00	\$ 246.00	4.13%
Rec Center	\$ 133.00	\$ 0.00	\$ 138.50	4.14%
Student Union	\$ 81.75	\$ 215.75	\$ 224.50	4.06%
Technology	\$ 51.50	\$ 0.00	\$ 53.00	2.91%
Total ACMF	\$ 547.50	\$ 681.50	\$ 707.00	3.74%
Incidental Fee	\$ 268.25	\$ 134.25	\$ 138.25	2.98%
All Mandatory Fees	\$ 815.75		\$ 845.25	3.62%*

**If the Incidental Fee recommendation is higher than 3%, the total Mandatory Fee percentage increase will be higher.*

Total ACMF (before adjustment)	\$ 547.50	\$ 568.00	3.74%
Total ACMF (after adjustment)	\$ 547.50	\$ 707.00	29.13%

Appendix B: 2022-23 Academic Year Graduate Tuition Increase Proposals

2022-23 ACADEMIC YEAR TUITION AND FEE INCREASES			
ACADEMIC YEAR			
	<i>2021-22 Tuition</i>	<i>2022-23 Tuition</i>	<i>Tuition Pct Increase</i>
GRADUATE (annual tuition and fees at the plateau rate)			
COLLEGE OF DESIGN			
<i>Architecture & Interior Architecture</i>			
Resident	23,685.00	23,847.00	0.7%
Nonresident	34,551.00	34,848.00	0.9%
<i>Landscape Architecture</i>			
Resident	19,086.00	19,248.00	0.8%
Nonresident	30,552.00	30,849.00	1.0%
<i>Historic Preservation</i>			
Resident	17,937.00	18,099.00	0.9%
Nonresident	29,553.00	29,850.00	1.0%
<i>Art</i>			
Resident	17,403.00	17,403.00	0.0%
Nonresident	19,023.00	19,023.00	0.0%
<i>Sports Product Design ¹</i>			
Resident	35,313.00	35,313.00	0.0%
Nonresident	35,313.00	35,313.00	0.0%
<i>Planning, Public Policy, & Management</i>			
Resident	18,561.00	19,047.00	2.6%
Nonresident	29,337.00	30,120.00	2.7%
<i>History of Art and Architecture</i>			
Resident	17,346.00	17,346.00	0.0%
Nonresident	27,417.00	27,417.00	0.0%
COLLEGE OF ARTS AND SCIENCES			
<i>MA/Phd</i>			
Resident	15,714.00	16,011.00	1.9%
Nonresident	28,161.00	28,971.00	2.9%
<i>CAS Electrochemistry Masters Internship (EMIP)</i>			
Resident	15,525.00	15,984.00	3.0%
Nonresident	15,525.00	15,984.00	3.0%
<i>CAS Psychology Online</i>			
Resident	14,958.00	15,363.00	2.7%
Nonresident	14,958.00	15,363.00	2.7%
COLLEGE OF EDUCATION			
<i>Base</i>			
Resident	19,107.00	19,485.00	2.0%
Nonresident	27,423.00	27,990.00	2.1%
<i>Supervision</i>			
Resident	20,595.00	21,000.00	2.0%
Nonresident	28,911.00	29,505.00	2.1%
<i>Clinical</i>			
Resident	22,452.00	22,911.00	2.0%
Nonresident	30,660.00	31,308.00	2.1%
<i>Administrative Licensure Programs</i>			
Resident	12,798.00	13,068.00	2.1%
Nonresident	12,798.00	13,068.00	2.1%
SCHOOL OF JOURNALISM AND COMMUNICATION			
<i>MA/PhD</i>			
Resident	16,416.00	16,821.00	2.5%
Nonresident	25,785.00	26,433.00	2.5%
<i>Strategic Communication</i>			
Resident	18,171.00	18,630.00	2.5%
Nonresident	25,056.00	25,677.00	2.5%
<i>Multimedia</i>			
Resident	18,279.00	18,738.00	2.5%
Nonresident	25,164.00	25,785.00	2.5%
<i>Advertising and Brand Management</i>			

Appendix B: 2022-23 Academic Year Graduate Tuition Increase Proposals (continued)

Resident	16,416.00	16,821.00	2.5%
Nonresident	25,785.00	26,433.00	2.5%
SCHOOL OF LAW			
<i>JD</i>			
Resident	39,618.00	41,598.00	5.0%
Nonresident	49,878.00	52,380.00	5.0%
<i>LLM</i>			
Resident	48,312.00	50,724.00	5.0%
Nonresident	48,312.00	50,724.00	5.0%
<i>CRES</i>			
Resident	23,571.00	24,759.00	5.0%
Nonresident	31,833.00	33,426.00	5.0%
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	30,498.00	31,107.96	2.0%
Nonresident	42,498.00	43,347.96	2.0%
<i>Accounting</i>			
Resident	19,917.00	19,917.00	0.0%
Nonresident	27,627.00	27,627.00	0.0%
<i>Finance²</i>			
Resident	24,840.00	24,840.00	0.0%
Nonresident	32,565.00	32,565.00	0.0%
<i>Oregon Executive MBA³</i>			
Resident	40,500.00	40,500.00	0.0%
Nonresident	40,500.00	40,500.00	0.0%
<i>Sports Product Management⁴</i>			
Resident	46,800.00	46,800.00	0.0%
Nonresident	46,800.00	46,800.00	0.0%
<i>Sports Product Management (ONLINE)</i>			
Resident	33,426.00	33,426.00	0.0%
Nonresident	33,426.00	33,426.00	0.0%
SCHOOL OF MUSIC AND DANCE			
<i>MA/PhD</i>			
Resident	15,024.00	15,024.00	0.0%
Nonresident	24,807.00	25,416.00	2.5%
KNIGHT CAMPUS			
<i>Industrial Internship Program⁵</i>			
Resident	20,700.00	21,312.00	3.0%
Nonresident	20,700.00	21,312.00	3.0%
<i>Bioengineering</i>			
Resident	15,876.00	16,362.00	3.1%
Nonresident	28,458.00	29,322.00	3.0%
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 Sports Product Management is for three terms of a five term program and Sports Product Management (ONLINE) is for three terms of a eight term program. Students in the program pay Portland-based fees.			
(5) Costs calculated at 12 credit hours. During the academic year, IIP students pay off-campus fees.			
(6) Students will be charged and additional \$20 per credit hour for undergraduate courses taken in the Business School.			
Source: UO Office of Institutional Research. For additional information, please contact J.P. Monroe (jpmonroe@uoregon.edu) at 541-346-2085.			

Appendix C: Members of the 2021–22 Tuition and Fee Advisory Board

Krista Borg	Director of Student Financial Services, Business Affairs Office
Isaiah Boyd	ASUO President; undergraduate student
Jim Brooks	Associate Vice President for Student Services and Enrollment Management and Director, Student Financial Aid and Scholarships
Josh Buetow	Assistant Dean of Finance and Operations, School of Journalism and Communication
Pamane Chaiwat	Doctoral student, international student
Robin Clement	Master of Accounting Director, University Senate Budget Committee member, Lecturer of Accounting, and Academic Director of the Master of Sports Product Management program, Lundquist College of Business
Angela Davis	Professor of Accounting and Senior Associate Dean of Academic Programs, Lundquist College of Business
Patricia Hersh	Professor of Mathematics
Kimberly Johnson	Vice Provost for Undergraduate Education and Student Success
Stuart Laing	Director of Budget and Resource Planning
Aaron Lewis	ASUO Finance Director; undergraduate student
Kevin Marbury	Vice President for Student Life; co-chair
Jamie Moffitt	Vice President for Finance and Administration & CFO; co-chair
JP Monroe	Director of Institutional Research
Sarah Nutter*	Edward Maletis Dean, Lundquist College of Business
Gabe Paquette	Vice Provost for Academic Affairs
Philip Scher	Divisional Dean for Social Sciences; Director of the Latin American Studies Program; and Professor of Anthropology and Folklore
Shreya Silori	Undergraduate student
Kathie Stanley	Associate Vice President and Chief of Staff, Division of Student Life
Gina Thompson	Cashier Specialist, Business Affairs Office
Gemma Williams**	Undergraduate student

* Due to scheduling issues, was replaced by Angela Davis, Senior Associate Dean of Academic Programs, in January 2022.

** Withdrew from TFAB in mid-January due to unforeseen circumstances.

Appendix D: Guests at TFAB meetings October 2021–February 2022

Debra Beck	Assistant Vice President for Student Services and Enrollment Management, and Executive Director, University Health Services
Marcilynn Burke	Dean, Dave Frohnmayer Chair in Leadership & Law, School of Law
Sorin Dragoiu	Director of Financial Services, Division of Student Life
Brian Fox	Associate Vice President for Budget, Financial Analysis, and Data Analytics; Executive Director, Monitoring and Assessment Program
Gavin Gamez	Reporter, <i>Daily Emerald</i>
Ellen Grant	Assistant Director of HR and Administration Services, Erb Memorial Union (EMU)
Michael Griffel	Assistant Vice President for Student Services and Enrollment Management, and Director, University Housing
Bill Harbaugh	Professor, Economics
Brent Harrison	Associate Director for Programs, Department of Physical Education and Recreation
Saul Hubbard	Media Relations and Communications Manager
Kay Jarvis	Director of Public Affairs and Issues Management
Anna Johnson	Erb Memorial Union (EMU) Board Chair, student
Jessie Minton	Vice Provost for Information Services and Chief Information Officer
Brady Nittmann	Director of Financial Operations, College of Education
Angie Peatow	Director of Budget and Financial Administration, Student Services and Enrollment Management
Kavi Shereth	Erb Memorial Union (EMU) Budget Chair, student
Donna Sutton Chittenden	Program Manager and Fee Book Administrator, Budget and Resource Planning
Ray Sykes	Associate Dean for Finance and Operations, School of Law
Roger Thompson	Vice President for Student Services and Enrollment Management
Laurie Woodward	Director, Erb Memorial Union (EMU)