Financial Aid at the University of Oregon

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Director of Student Financial Aid and Scholarships
Financial Aid Overview

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

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

Resident Tuition and Fees: $15,669
Non-Resident Tuition and Fees: $43,302

Food and Housing: $15,840
Books and Supplies: $1,320
Resident Travel: $432
Non-Resident Travel: $1,380
Miscellaneous: $2,460
Need Based Financial Aid

• Federal Pell Grant
• Federal SEOG
• Federal Work Study
• Federal Direct Loans
• Oregon Opportunity Grant
• PathwayOregon Award*
• Diversity Excellence Scholarship*
Merit Based Financial Aid

• Stamps Scholarship
• Presidential Scholarship
• Excellence Scholarship
• Summit Scholarship
• Apex Scholarship
• PathwayOregon Scholarship*
• Diversity Excellence Scholarship*
Federal Student Aid Snapshot, FY23

Federal Pell Grant, 22,021,231, 11%
FSEOG, 2,127,758, 1%
TEACH Grant, 32,375 0%
Federal Work Study, 1,167,335...
Loans, 168,237,97...
State Financial Aid Snapshot, FY23

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

<table>
<thead>
<tr>
<th>ACADEMIC YEAR</th>
<th>Federal</th>
<th>State</th>
<th>Institutional</th>
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</thead>
<tbody>
<tr>
<td>2018-2019</td>
<td>8,470,310</td>
<td>23,951,346</td>
<td>38,500,000</td>
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<tr>
<td>2019-2020</td>
<td>8,171,007</td>
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<td>2020-2021</td>
<td>8,321,657</td>
<td>21,535,162</td>
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<tr>
<td>2021-2022</td>
<td>10,095,540</td>
<td>23,203,044</td>
<td>62,050,000</td>
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<tr>
<td>2022-2023</td>
<td>11,517,840</td>
<td>25,348,699</td>
<td>68,925,000</td>
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</table>

DOLLARS

Federal  State  Institutional
EXPENDITURES BY AID TYPE

2018-2019
- Merit Based Scholarships: 2,147,184
- Need Based Scholarships: 610,824
- Unfunded Mandates: 1,694,800
- International Remissions: 650,790
- Graduate School Remissions: 11,121,923
- Diversity Excellence Scholarship: 25,303,879

2019-2020
- Merit Based Scholarships: 2,290,973
- Need Based Scholarships: 542,262
- Unfunded Mandates: 1,071,985
- International Remissions: 891,088
- Graduate School Remissions: 5,153,960
- Diversity Excellence Scholarship: 33,414,727

2020-2021
- Merit Based Scholarships: 2,187,649
- Need Based Scholarships: 670,898
- Unfunded Mandates: 1,043,698
- International Remissions: 8,666,823
- Graduate School Remissions: 48,316,283
- Diversity Excellence Scholarship: 39,300,367

2021-2022
- Merit Based Scholarships: 2,186,644
- Need Based Scholarships: 655,946
- Unfunded Mandates: 1,101,524
- International Remissions: 7,554,138
- Graduate School Remissions: 57,963,162
- Diversity Excellence Scholarship: 48,316,283

2022-2023
- Merit Based Scholarships: 2,134,975
- Need Based Scholarships: 650,213
- Unfunded Mandates: 1,185,048
- International Remissions: 6,623,304
- Graduate School Remissions: 57,963,162
- Diversity Excellence Scholarship: 650,213

Legend:
- Merit Based Scholarships
- Need Based Scholarships
- Unfunded Mandates
- International Remissions
- Graduate School Remissions
- Diversity Excellence Scholarship
### UO Scholarship Eligibility and Amounts
### Changes in 2019, 2021, 2023, 2024

<table>
<thead>
<tr>
<th></th>
<th>2016 Programs</th>
<th>2019 Programs</th>
<th>2021 Programs</th>
<th>2023 Programs</th>
<th>2024 Programs</th>
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<td><strong>Resident</strong></td>
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<tr>
<td>Summit</td>
<td>3.80 GPA/1250 SAT</td>
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<tr>
<td>Apex</td>
<td>3.60 GPA/1220 SAT</td>
<td>$3,000</td>
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<td>$3,000</td>
<td>3.70 GPA</td>
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<tr>
<td>PathwayOregon</td>
<td>3.40 GPA/Pell eligible</td>
<td>Tuition/Fees</td>
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<tr>
<td><strong>Non-Resident</strong></td>
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<tr>
<td>Excellence</td>
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The implementation of test optional admissions in 2021 increased the number of scholarship eligible students and required a change in scholarship amounts.
Application Process

• Apply for Admission
• File the FAFSA / ORSAA
• File any Institutional Application
FAFSA Data

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

• Cost of attendance – EFC = Need

• Resident example: $35,721 – 2,000 = $33,721

• Non-Resident example: $64,302 – 2,000 = $62,302
Resident Financial Aid Offer

EFC=$2,000

Federal Pell Grant: $5,445
Oregon Opportunity Grant: $7,008
PathwayOregon Award: $3,216
Federal Work Study: $2,000
Federal Direct Subsidized Loan: $3,500
Federal Direct Unsubsidized Loan: $2,000
Federal Direct PLUS Loan: $12,552
Non-Resident Financial Aid Offer

EFC=$2,200

Scholarship: $15,000
Federal Pell Grant: $5,445
Federal Direct Subsidized Loan: $3,500
Federal Direct Unsubsidized Loan: $2,000
Federal Direct PLUS Loan: $39,857
2024-2025 Changes

• FAFSA availability by December 31, 2023
  • Institutional receipt of data by the end of January 2024
• Fewer questions – 108 to 46
• Contributors
  • FSA ID
  • Who provides the most support?
• Future Act Direct Data Exchange – IRS code amended to mandate disclosure of FTI directly from the IRS to ED with consent (required)
• Family size changed to align with individuals reported as dependents on the tax return
• Number in college no longer impacts SAI
2024-2025 Changes

- Business / Farm net worth
  - No longer limited to businesses with > 100 employees
  - Family farm is included
- Calculation of a SAI instead of an EFC
  - Can be negative, up to -$1,500
- No SAI proration
- Child support is an asset
- Emergency financial assistance is not OFA
- Enrollment intensity
2024-2025 Changes

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

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

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