

Financial Aid at the University of Oregon

Jim Brooks

Senior Associate Vice President Student Services and Enrollment Management,
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*

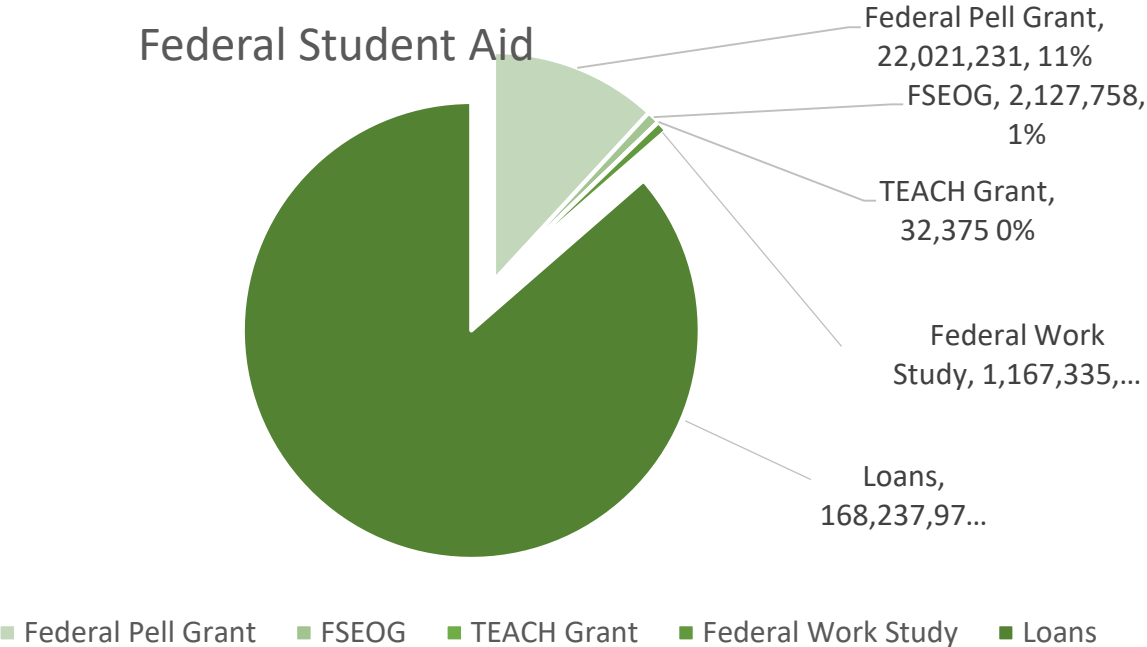


Merit Based Financial Aid

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



Federal Student Aid Snapshot, FY23

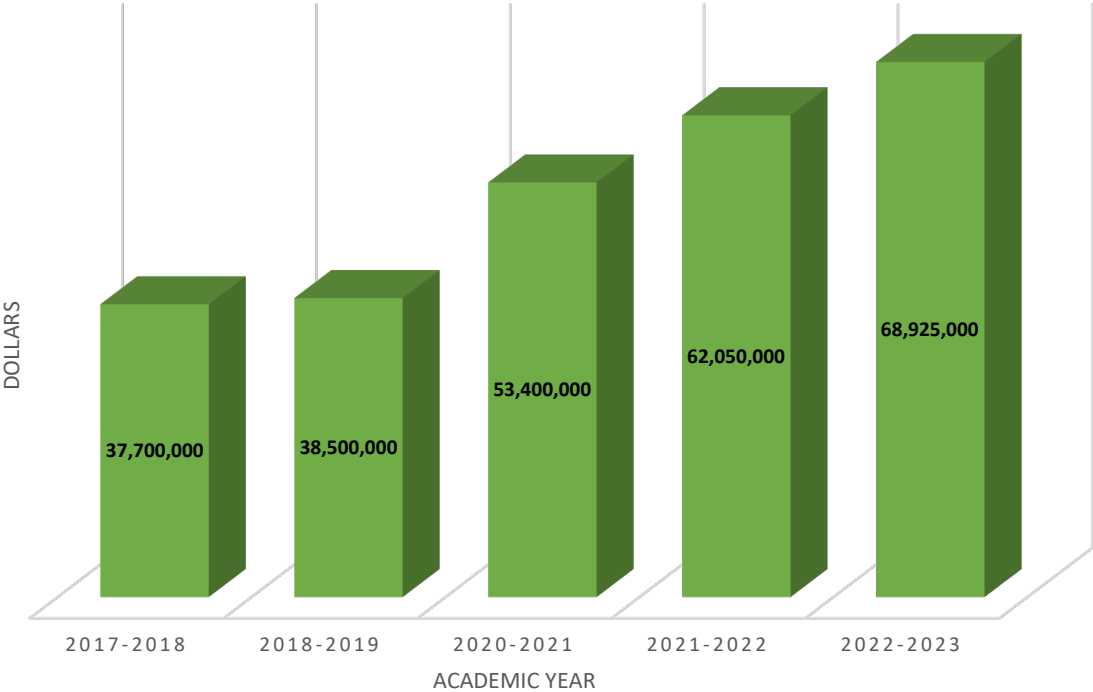


State Financial Aid Snapshot, FY23

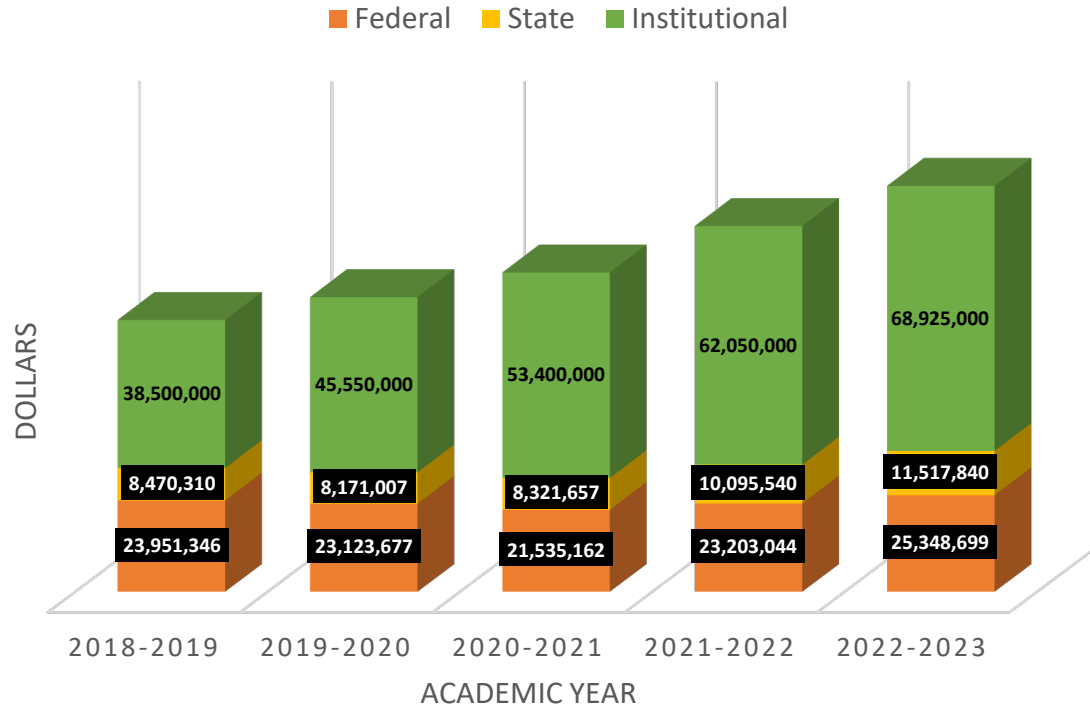
- Oregon Opportunity Grants: \$11,517,840
 - FY23 grant range: \$2,352 to \$4,692
 - FY24 grant range: \$3,000 to \$7,524
- Foster Youth Tuition Waiver: \$20,670
- State Scholarships: \$1,872,618
- National Guard Tuition Assistance: \$329,508



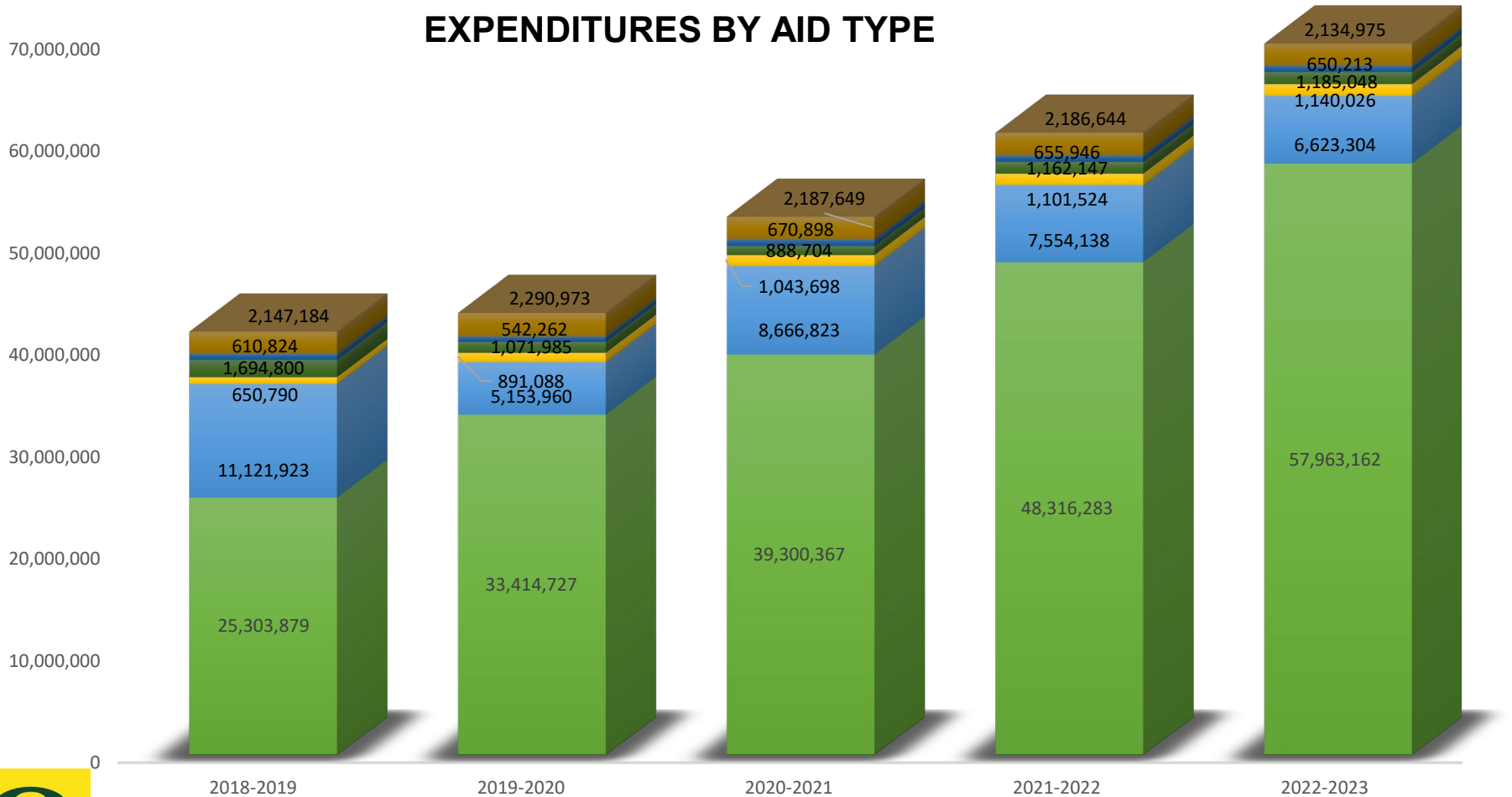
INSTITUTIONAL AID BUDGET



INSTITUTIONAL, FEDERAL, STATE GRANTS



EXPENDITURES BY AID TYPE



■ 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

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

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



Application Process

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



FAFSA Data

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



Financial Need

- Cost of attendance – EFC = Need
- Resident example: $35,721 - 2,000 = 33,721$
- Non-Resident example: $64,302 - 2,000 = 62,302$



Resident Financial Aid Offer

EFC=\$2,000

Federal Pell Grant: \$5,445

Oregon Opportunity Grant: \$7,008

PathwayOregon Award: \$3,216

Federal Work Study: \$2,000

Federal Direct Subsidized Loan: \$3,500

Federal Direct Unsubsidized Loan: \$2,000

Federal Direct PLUS Loan: \$12,552



Non-Resident Financial Aid Offer

EFC=\$2,200

Scholarship: \$15,000

Federal Pell Grant: \$5,445

Federal Direct Subsidized Loan: \$3,500

Federal Direct Unsubsidized Loan: \$2,000

Federal Direct PLUS Loan: \$39,857



2024-2025 Changes

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



2024-2025 Changes

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



2024-2025 Changes

- Pell calculations changed
 - Max Pell
 - SAI \leq \$0
 - Parent is not required to file a tax return
 - Single parent with AGI $>$ \$0 and \leq 225% of the poverty guideline for family size and state of residence
 - Not a single parent with AGI $>$ \$0 and \leq 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 \leq 325% of the poverty guideline for family size and state of residence
 - Not a single parent with AGI \leq 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?

Jim Brooks

brooksja@uoregon.edu

541.346.6121

