

**Western Oregon University Board of Trustees:
Finance & Administration Committee (FAC)
Meeting No. 31 – April 7, 2023 | 8:00AM-12:00PM
Public Meeting: via [Zoom](#) | Meeting ID: 852 8295 4209
Phone: +1-253-215-8782**

AGENDA

- I. **CALL-TO MEETING / ROLL CALL** (8:00-8:01am)
- II. **COMMITTEE CHAIR'S WELCOME / ANNOUNCEMENTS** (8:01-8:05am)
- III. **CONSENT AGENDA** (8:05-8:10am)
 - 1) [Approval January 26, 2023 Meeting Minutes](#) (page 3)
- IV. **ACTION ITEMS:**
 - 1) [Accept FY2023 Management Report \(as of February 28, 2022\)](#) (8:10-8:20am) | *Dr. Ana Karaman, Vice President Finance & Administration and Camarie Moreno, Director of Budget & Planning* (page 8)
 - 2) [Recommend for Approval Tuition & Fees for 2023-24 Academic Year & Summer 2023](#) (8:20-9:00am) | *Dr. Ana Karaman, Vice President Finance & Administration* (page 17)
 - 3) [Recommend for Approval Occupational Therapy Doctorate Tuition for 2024-25](#) (9:00-9:20am) | *Dr. Ana Karaman, Vice President Finance & Administration* (page 60)
 - 4) [Recommend for Approval Capital Budget for WOU:Salem Renovation](#) (9:20-9:40am) | *Dr. Ana Karaman, Vice President Finance & Administration and Jason Krawczyk, Director Capital Planning & Construction & Sean Roush, Director Occupational Therapy* (page 62)
 - 5) [Recommend for Acceptance Revision of Finance & Administration Committee Charter](#) (9:40-10:20am) | *Gayle Evans, Chair* (page 78)
- V. **REPORTS & DISCUSSION ITEMS:**
 - 1) [Supplemental Tuition & Fee Book](#) (10:20-10:25am) | *Dr. Ana Karaman, Vice President Finance & Administration* (page 83)
 - 2) [University Budget Advisory Committee](#) (UBAC) (10:25-10:35am) | *co-chair Cara Groshong* (page 105)

- 3) [University Technology Advisory Committee](#) (UTAC) (10:35-10:45am) | co-chairs *Dr. Chelle Batchelor & Bill Kernan* (page 107)
- 4) [Finance & Administration Report](#) (10:45-11:00am) | *Dr. Ana Karaman, Vice President Finance & Administration* (page 108)
 - a. Cash flow projections | *Dr. Ana Karaman, Vice President Finance & Administration and Darin Silbernagel, Treasurer*
 - b. Update on Quasi Endowment Performance | *Dr. Ana Karaman, Vice President Finance & Administration*
 - c. Review of Budget Dashboard | *Dr. Ana Karaman, Vice President Finance & Administration*
 - d. FY24 Budget Planning Update | *Dr. Ana Karaman, Vice President Finance & Administration*
- 5) [Cybersecurity Presentation](#) (11:00am-12:00pm) | *Michael Ellis, University Computing Solutions*

VI. APRIL 18-19, 2023 BOARD MEETING PREPARATION

VII. UPDATES AND AROUND-THE-TABLE

VIII. ADJOURNMENT

**Western Oregon University Board of Trustees:
Finance & Administration Committee (FAC)
Meeting No. 30 – January 26, 2023
8:00AM – 11:00AM
Public Meeting: via [Zoom](#)
Phone: +1-253-215-8782 | Meeting ID: 816 6492 0811**

DRAFT MINUTES

I. CALL TO MEETING/ ROLL CALL

The meeting was called to order at 8:02am. The following Trustees were present: Gayle Evans, Cec Koontz, and Angela Fasana. The following Trustees were absent: Lupe Diaz and Leah Mitchell. Others present: Ana Karaman, Cara Groshong, Camarie Moreno, Samantha Cameron, Rebecca Chiles, Bill Kernan, Jason Krawczyk, Chelle Batchelor, Dona Vasas, Darin Silbernagel, Kristin Diggs.

II. COMMITTEE CHAIR’S WELCOME AND INTRODUCTIONS

Chair Evans said she hoped to welcome Trustee Lupe Diaz, but he is out of the country. He graduated from WOU, and she hopes we will have an opportunity to get to know him at the next meeting.

III. CONSENT AGENDA

- 1) Approval of November 1, 2022 Meeting Minutes

Trustee Koontz moved for approval of the Consent Agenda, as presented. Trustee Fasana seconded. The motion was passed unanimously.

IV. ACTION ITEMS:

- 1) FY2022 Financial Statements Audit and Single Audit

Financial statements used to be prepared by shared services, which cost annually \$147K. This is the third year of financial statements being prepared in-house. Lehman provided financial highlights focusing on major changes between FY21 and FY22. Net position included an overall decrease in \$518K, broken up between three areas – net investments in capital assets, restricted expendable net position, and unrestricted net position. Net investment in capital assets decreased by \$3M, which was largely due to depreciation and large debt payments associated with those capital assets. The restricted portion decrease of \$6M was largely due to the OPEB benefits. These are WOU’s share of benefit assets set aside for future claims. The unrestricted portion increased almost \$9M, which was primarily due to operation expense increases of \$2M, quasi-endowment of \$500K, and PERS/OPEB of \$6M.

Operating revenue increased \$5.5M, with grant activity making up about \$2M of that. Auxiliary services increased nearly \$8M, because of campus recovering from the pandemic. This was offset by decreased tuition & fees by \$4.6M. Operating expenses increased \$7M, with a decrease in compensation and benefits of \$3M. Supplies & services increased \$7M, footnote 12 of the financial statements details how this is accounted for. Additionally, scholarships and fellowships increased by \$3.5M, which includes the student portion of the HEERF grant. Overall, cash position increased by \$1M. Karaman noted that one of the major changes was the change in pension liability and other institutions were similarly impacted.

Eide Bailly have been the external auditors for the last six years. Kristin Diggs, a partner at Eide Bailly, gave an overview of the audit process and the audit letters. A new standard was implemented this year that requires auditors to disclose the significance of major risks. These risks are not new, but the new guidelines require that they present these risks to the Board of Trustees and governing bodies, as they make decisions for agencies. The risks include management override of controls, valuation of the allowance for doubtful accounts, and improper revenue recognition, which are all common for higher education institutions.

As a result of audit procedures, Eide Bailly passed on two adjustments as they were not significant (material) enough to impact the financial statements. The first one is related to the HEERF funding with a passed adjustment \$151K that was from the prior year. The second one was the right to use asset to be in line with the actual life of the lease rather than the life of the asset, which was related to GASB 87 standard new for this year. Other than the two passed adjustments, disagreements with management on findings would have been noted; however, there were none. Financial Statement audit testing resulted in an unmodified opinion, as well as for Internal Control over Financial Reporting.

Single Audit testing included three major programs: Student Financial Assistance, HEERF/GEER/SIP, and the Child Care and Development Block Grant. Testing resulted in a clean, unmodified opinion. There was one finding (HEERF), which was a repeat finding from last year. Due to the timing in the beginning of the fiscal year, the first report was late, and all reports submitted thereafter were submitted on-time. Last year this finding was a material weakness, and this year it was downgraded to significant deficiency.

Upcoming for next year (FY23), GASB 96 will be related to Subscription-Based Information Technology Arrangements. These will be brought on the books, like leases. This will be a big change for Higher Education institutions, and Banner would be an example of WOU's impact on this change in standard. Additionally, GASB 94 relates to Partnerships and Availability Payment Arrangements (FY24). Lastly, GASB 101 relates to Compensated Absences (FY25).

Evans noted that the committee has an opportunity to excuse management to speak with the auditors independently if they so wished.

Trustee Koontz moved to recommend the Board of Trustees accept the fiscal year 2022 audit of financial statements and single audit. Trustee Fasana seconded the motion. The motion was passed unanimously.

2) FY2023 Management Report (as of December 31, 2022)

Karaman noted the purpose of the management report is to see how we are doing as an institution in terms of revenue and spending for each period, compared to the budget, prior year actuals in the same period, and looking forward to project year-end. This year's budget was a deficit budget of about \$8M, but there have been steps taken by management to reduce the actual overall deficit through one-time savings, with the goal to not utilize more than \$5M of fund balance. Actions taken to date include 10% across the board S&S reductions and centralizing salary savings rather than allowing departments to spend those savings on other uses.

Moreno reviewed the P6 report, which shows tuition revenue is down about \$1M, because of enrollment decline. Fall was down 7% from last fall term; however, freshmen were slightly up which is hopefully a sign that WOU is turning the corner on enrollment. The budget is built based on 6% attrition between terms and fall to winter actual attrition came in closer to 5%. Moreno noted the fee remission comparison is not fair, as winter term remissions had not been disbursed in P6 FY23, while they were in the prior year. As of January, total fee remissions are \$3.276M, which is much more comparable to prior year. Overall total revenues are steady, even though individual components vary. On the expense side, personnel had an increase; raises for both unions, in addition to unclassified raises. Service & Supplies spending has increased slightly as well, and Dr. Peters continues to communicate with campus to watch spending to hopefully slow down our expenses. Capital Expenses are holding steady.

On the auxiliary side, fee revenue (primarily incidental fees) has decreased due to fewer students enrolled. Sales & Services are slightly down as well, while other revenue is slightly increased. On auxiliary expenses, personnel and services & supplies costs have increased more dramatically. Some of this can be associated with the return to campus; however, we are hoping to see a slow-down on the expense side for auxiliaries in the coming months. Designated Operations, which includes the Oregon Council of Presidents and Telecommunications departments, are holding relatively steady.

Projected to year end, tuition & fees are expected to come in slightly higher than the adjusted budget, which was based on actual fall enrollment. This is partly due to the 5% attrition for winter term, instead of the budgeted 6%, as well as \$500K of anticipated fee remission savings. Gifts, Grants, and Contracts are also projected to be over budget, simply due to the increase in grant activities and therefore increased indirect cost recovery. Other revenue expects to see a slight decrease. Overall, total revenue is forecasted to be about \$1M higher than the budget.

On the expense side, \$60M of personnel was budgeted and are currently forecasting \$57M. Typical salvage savings in a year are closer to \$1M, so the anticipated \$3M is a reflection of a soft hiring freeze and salary savings being swept centrally. Services &

Supplies are projected to be slightly over budget, and we are hoping to see a slow-down in that area to not go over budget by the end of the year. Net Transfers consists of our scheduled Athletics and Child Development Center subsidies. The year end projection shows an anticipated deficit of \$4.67M (reaching the target of utilizing less than \$5M of fund balance) primarily due to fee remission and salary savings. Karaman issued a caution that these are projections, and the university needs to continue to be diligent in our efforts.

Auxiliaries are projected to be slightly under budget on some revenues and slightly over on other revenues, which is expected to even out to what was budgeted for. Personnel and Service & Supplies are both projected to be over budget based on current spending patterns.

Trustee Koontz moved to accept the FY23 Year-End Report and overall Management Report as of Dec. 31, 2022. Trustee Fasana seconded. The motion was passed unanimously.

V. REPORTS & DISCUSSION ITEMS:

1) University Budget Advisory Committee (UBAC)

Groshong, UBAC tri-chair, shared that the committee met on December 8th. Karaman also noted that the Academic Sustainability Committee has become great partners to UBAC. The groups have been collaborating on how to move forward together in a transparent and sustainable way, as WOU reviews their budget reduction strategy. WOU was selected to participate in a NACUBO grant, which has developed a budget reduction tool that is used to evaluate the impact of reductions. Both committees as well as the senior leadership team are currently reviewing the strategic budget tool. The committees will meet once a month for the remainder of the academic year, with the intention to strategize on ways to facilitate opportunities for campus to engage on money-saving and increasing revenue, along with increasing enrollment.

2) University Technology Advisory Committee (UTAC)

Kernan, UTAC co-chair, shared the committee met in October and December, which focused on the committee's charge and the membership structure. Ellis is charged to the group's cybersecurity updates and works with Homeland Security to stay engaged. WOU recently purchased a project accessibility widget on the bottom of the homepage and an AI driven tool behind the scenes that helps blind students view our webpages. Additionally, blue phones have been brought up as a concern by students, and UCS is working with Campus Public Safety, Housing, student groups, and Facilities Services to address this. The group walked the campus to note where lights and blue phones were needed. \$120K in rebates to upgrade energy-efficient lighting is available that may be utilized, as well as Capital Improvement and Renewal (CIR) dollars to help fund these priorities.

3) Finance & Administration Report

Karaman gave an overview of the cash flow report, which includes \$16.5M of funds allocated by the state for the Steam Pipeline repair project, which are being given to WOU upfront rather than on a reimbursement-basis as other capital funds are. Silbernagel mentioned that as of December 31st, we had \$41M cash position across all funds. The projection is still showing \$69.5M inflow to project over the next six months and \$72M projected outflow.

Krawczyk reported on the schematic drawings for the Student Success Center. One of the key features will be street-level access to the first floor and second floor. The design incorporates multiple flex spaces and workspaces.

The Steam Line project is also underway. The plan is to ensure future access to the Steam Line for the Student Success Center project so that the road will not need to be torn up again in the future. They also hope to tie it into the ITC south wing from the existing tunnel from Rice Auditorium. The plan is to not only have the steam line but also chiller pipes that can run throughout campus. The roadway will be opened up and worked on within the next six months.

Other projects underway include roofing projects and WOU signage in Salem.

Moreno reported that work is underway to identify \$5M in permanent reductions for FY24. This is in line with the fiscal sustainability plan developed as a result of WOU's accreditation review, which models achieving 5,000 FTE in five years (FY28) and a break-even budget, as well as a path to preserve financial reserves until that is achieved. This model includes utilizing \$5M of the fund balance in the current year, which is less than the FY23 Adjusted Budget, and the campus is actively working towards identifying those one-time savings. Current FY24 budget will be just one step in the longer fiscal sustainability future.

Karaman shared the WOU Budget Dashboard which provides historical data and trends in graphs to serve as a visual update for the committee to review. There are three guiding principles: Stakeholder Involvement and Transparency, Continuity of Decisions, and Strategic Reductions.

VI. FEBRUARY 14-15, 2023 BOARD MEETING PREPARATION

VII. UPDATES AND AROUND-THE-TABLE

VIII. ADJOURNMENT

The meeting was adjourned at 11:04am.

Finance & Administration Committee (FAC), April 7, 2023, FY2023 Management Report

Period 8 Actual to Actual Variance:

Education & General Fund Report:

This report provides eight months of actual revenue and expense activity (as of February 28, 2023) as compared to the same period in prior fiscal year.

Revenues:

Tuition revenues are \$1.238M less than the prior year despite having a modest tuition increase (3.19% for resident undergrad) due to an approximate 7.0% enrollment decrease in Fall 2022 and 5.2% enrollment decrease in Winter 2023 (both decreases respective to the same term prior year; 4.9% attrition between Fall 2022 and Winter 2023). Online course fees have decreased by \$325K because of decreased enrollment. Other fees are \$62K more than the prior year. Fee remissions have increased \$226K from the prior year. Altogether, this results in net tuition and fees for Period 8 being \$1.727M less than the prior year.

Government resources & allocations have increased by \$1.242M from prior year based on the HECC's Public University Support Fund (PUSF) allocation formula. This includes the fifth-seventh quarterly distributions for the 2021-23 biennium. 49% of PUSF is distributed in year 1 (FY22) and the remaining 51% distributed in year 2 (FY23).

Gift grants and contracts revenue has increased by \$690K from prior year, primarily reflecting increased grant indirect revenue. Other revenues have increased by \$370K from the prior year.

Overall, total revenues are \$51.804M, \$575K more than the prior year.

Expenses:

Personnel expenses are \$35K more than the prior period and reflect variations in faculty/staff from the prior year. T/TT faculty received step increases and a 1.5% COLA effective September 2022, NTT faculty received a 2.75% COLA effective September 2022, unclassified staff received a 4.5% COLA effective July 1, 2022, and classified staff received step increases and a 2.5% COLA effective July 1, 2022.

Services and supplies expenses are \$335K less than the prior year.

Overall, total expenses are \$40.697M, \$295K less than the prior year.

Net Revenues less Expenses:

Net revenues less expenses have increased by \$870K compared to prior year.

Auxiliary Enterprises:

Auxiliary Enterprises is comprised of Athletics, University Housing, Campus Dining, Parking, Bookstore, Student Health & Counseling Center (SHCC), Child Development Center (CDC), Incidental Fee, and other minor operations.

Revenues:

Enrollment Fees have decreased by \$446K, primarily because of decreased enrollment and the change to the incidental fee structure (in FY22, fee of \$355 was charged to all students at credit 1; in FY23, the fee is \$372, but a reduced fee of \$200 is charged to students not enrolled on the Monmouth campus). Sales and Services are down \$253K from the prior year, primarily in housing/dining (\$275K down, other areas are up to compensate for this). Other Revenue increased by \$497K, primarily due to increased conference activity. Altogether, auxiliary revenue totals \$11.971M and has decreased \$202K from the prior year.

Expenses:

Personnel expenses are \$635K more than the prior year, primarily in housing/dining (\$281K) and athletics (\$156K). Service & Supplies are \$1.696M more than the prior year, primarily in housing/dining (\$628K), incidental fee funded areas (\$260K), and athletics (\$578K). Altogether, auxiliary expense total \$14.645M, an increase of \$2.331M from the prior year.

Net Revenues less Expenses:

Net revenues less expenses total -\$2.674M and have decreased by \$2.533M compared to prior year.

Designated Operations, Service Departments, Clearing Funds:

Designated Operations, Service Departments, and Clearing Funds is comprised primarily of Telecommunications and Oregon Council of Presidents. The Clearing Fund is cleared on a quarterly basis. As of February 28th, the clearing fund reflects temporary revenue and expense balances, these balances can cause misleading comparisons as a result.

Revenues and expenses are comparable to prior year, with revenues up \$535K (although \$353K is related to the clearing fund) and expenses up \$27K, for a net difference from prior year of \$508K.

FY23 Projected Year-End:

This report provides year-end projections. The projected year-end methodology is a combination of actual revenues and expenses for the first eight months of operations and projections for the remaining four months of FY23. Projections for periods nine through twelve are based on the actual FY22 realization/burn rates for period eight, which are applied to FY23 revenues and expenses.

Education & General Fund:

Revenues:

Total revenues are projected to be \$68.507M, \$2.638M more than the FY23 adjusted budget. Altogether, net student fees & tuition are projected to be \$527K more than the adjusted budget, which encompasses a projection of \$5M for fee remissions, \$500K less than what was budgeted. Government Resources & Allocations are projected to be \$32.373M based on the latest schedule provided from HECC. Gifts, grants, and contracts are projected at \$2.464M, \$1.284M higher than the FY23 adjusted budget, primarily because of increased grant indirect activity. Other revenues are projected to be \$3.02M, \$420K more than the FY23 adjusted budgeted amount.

Expenses:

Total expenses are projected to be \$67.063M, \$3.524M less than the FY23 adjusted budget. Personnel is projected to be \$56.418M, \$3.075M less than the budget due to salvage savings from vacant positions; \$550K of salvage savings were incorporated into the FY23 adjusted budget as a one-time activity. Service and supplies are projected to be \$10.384M, \$521K less than the FY23 adjusted budget, which includes \$1.141M of one-time expense.

Transfer Schedule:

A projected transfer schedule is attached to provide details for the projected transfers in and out. This includes projected transfers to Athletics of \$4M to make their operations whole (\$3.177M budgeted) and \$150K to subsidize Child Development Center operations. Other transfers included are \$660K that has been transferred out for the Student Success Center XI-G match, and a \$150K projected transfer in from the quasi endowment to support the equity audit.

One-Time Activities:

One-time activities include a \$299K reimbursement to E&G from HEERF SSARP. This is the last of the expected funds from HEERF.

Net Revenues less Expenses and Transfers:

Net revenues less expenses and transfers are projected to be a loss of \$3.106M versus the FY23 adjusted budget of a loss of \$7.896M. This difference is primarily due to

savings in budgeted fee remissions, an increase in grant indirect revenue, and anticipated personnel salvage savings. Projected year-end fund balance is \$11.984M, or 17.49% of projected revenues.

Auxiliary Enterprises:

Revenues:

Total revenues are projected to be \$18.53M, \$44K less than the FY23 adjusted budget. Enrollment fees are projected to be \$5.039M, \$569K less than the budget, primarily due to decreased enrollment. Sales and services are projected to be \$10.428M, \$536K less than budgeted. Other revenues are projected to be \$3.063M, \$1.062M more than the FY23 adjusted budget, primarily due to increased conference activity.

Expenses:

Total expenses are projected to be \$24.575M, \$3.505M more than the budget. Personnel is projected to be \$10.632M, \$40K more than the adjusted budget. Service and supplies are projected to be \$13.943M, \$3.465M more than the adjusted FY23 budget.

Net Revenues less Expenses and Transfers:

Net revenues less expenses and transfers are projected to be a loss of \$3.872M compared to the FY23 adjusted budget of a loss of \$1.036M. This results in a projected year end fund balance of \$1.317M.

Designated Operations, Service Departments, Clearing Funds:

Revenues:

Total revenues are projected to be \$2.359M, \$105K more than budget.

Expenses:

Total expenses are projected to be \$2.344M, \$63K over the budget.

Net Revenues less Expenses and Transfers:

Net revenues less expenses and transfers are projected to be \$14K compared to the FY23 budget of a loss of \$28K.

STAFF RECOMMENDATION:

It is recommended that the Western Oregon University Finance and Administration Committee accept the FY23 Projected Year-End Report and the overall Management Report as of February 28, 2023.

Western Oregon University
P8 YTD Actual to Actual Variance

(Unaudited, non-GAAP, for management purposes only)
(in thousands)

As of February 28, 2023
For the Fiscal Year Ended June 30, 2023

	P8 FY22 Actuals	P8 FY22 Realization/ Burn Rate %	P8 FY23 Actuals	P8 FY23 % of Budget	Variance		Note
					Actuals	%	
Education & General Fund							
Revenues							
Tuition	23,028		21,790		(1,238)		Decreased enrollment.
Online Course Fees	2,576		2,250		(325)		
Other Fees	871		933		62		
Less: Fee Remissions	(3,192)		(3,417)		(226)		
Net Student Fees & Tuition	23,283	70.56%	21,556	71.56%	(1,727)	1.00%	
Government Resources & Allocations	25,935	82.97%	27,177	85.02%	1,242	2.04%	
Gift Grants and Contracts	624	53.35%	1,314	111.39%	690	58.04%	
Other Revenue	1,387	49.91%	1,757	67.58%	370	17.67%	
Total Revenues	51,229	75.11%	51,804	78.65%	575	3.54%	
Expenses							
Personnel	34,607	62.07%	34,642	58.23%	(35)	-3.84%	
Service & Supplies	6,336	63.95%	6,001	55.03%	335	-8.92%	
Capital Expense	49	20.77%	54	28.63%	(5)	7.85%	
Total Expenses	40,992	62.20%	40,697	57.65%	295	-4.54%	
Net Revenues less Expenses	10,237		11,107		870		

Western Oregon University
P8 YTD Actual to Actual Variance

(Unaudited, non-GAAP, for management purposes only)
(in thousands)

As of February 28, 2023
For the Fiscal Year Ended June 30, 2023

	P8 FY22 Actuals	P8 FY22 Realization/ Burn Rate %	P8 FY23 Actuals	P8 FY23 % of Budget	Variance		Note
					Actuals	%	
Auxiliary Enterprises Funds							
Revenues							
Enrollment Fees	3,938	69.30%	3,492	62.27%	(446)	-7.03%	
Sales and Services	6,711	61.93%	6,458	58.90%	(253)	-3.03%	
Other Revenue	1,523	65.97%	2,020	100.98%	497	35.00%	
Total Revenues	12,172	64.65%	11,971	64.45%	(202)	-0.20%	
Expenses							
Personnel	6,267	64.92%	6,902	65.16%	(635)	0.25%	
Service & Supplies	6,046	55.53%	7,743	73.89%	(1,696)	18.36%	
Capital Expense	-	100.00%	-	100.00%	-	0.00%	
Total Expenses	12,313	59.94%	14,645	69.50%	(2,331)	9.56%	
Net Revenues less Expenses	(141)		(2,674)		(2,533)		
Designated Operations, Service Departments, Clearing Funds							
Revenues							
Enrollment Fees	(7)	-21.71%	366	759.74%	373	781.45%	
Sales and Services	90	64.09%	92	72.40%	2	8.32%	
Other Revenue	1,256	63.90%	1,416	68.12%	160	4.22%	
Total Revenues	1,338	62.57%	1,873	83.14%	535	20.57%	
Expenses							
Personnel	592	75.80%	529	51.96%	62	-23.84%	
Service & Supplies	744	51.97%	855	67.77%	(111)	15.81%	
Capital Expense	21	21498.59%	-	100.00%	21	-21398.59%	
Total Expenses	1,358	61.33%	1,384	60.71%	(27)	-0.63%	
Net Revenues less Expenses	(19)		489		508		

Western Oregon University
 FY23 Projected Year-End
 (Unaudited, non-GAAP, for management purposes only)
 (in thousands)

As of February 28, 2023
 For the Fiscal Year Ended June 30, 2023

	FY22 Year-End Actuals	FY23 Projected Year-End	FY23 Adjusted Budget	Variance FY23 Projected Year-End to Budget	Note
Education & General Fund					
Recurring Operating Activities					
Student Fees & Tuition (net of remissions)	33,000	30,650	30,123	527	
Government Resources & Allocations	31,257	32,373	31,966	407	Projection is based on schedule from HECC.
Gift Grants and Contracts	1,171	2,464	1,180	1,284	
Other Revenue	2,779	3,020	2,600	420	
Total Revenues	68,206	68,507	65,869	2,638	
Personnel	55,759	56,418	59,493	3,075	Salvage savings (\$550K budgeted)
Service & Supplies	9,907	10,384	10,905	521	Budget includes \$1.141M one-time expense
Capital Expense	238	261	190	(72)	
Total Expenses	65,904	67,063	70,587	3,524	
Net Transfers	4,168	4,849	3,477	(1,372)	Projection is based on transfer schedule.
Total Expenses and Transfers	70,072	71,913	74,064	2,151	
Operating Net Revenues less Expenses	(1,866)	(3,406)	(8,195)	4,790	
One-Time Activities					
HEERF Reimbursement	5,168	299	299	-	
Total One-Time Activities	5,168	299	299	-	
Total Net Revenues less Expenses	3,301	(3,106)	(7,896)	4,790	
Fund Balance at the Beginning of the Year	10,870	15,090	15,090		
Additions/Deductions to Fund Balance	918	-	-		
Fund Balance at the End of the Year	15,090	11,984	7,194		
Fund Balance as a Percentage of Revenues	20.57%	17.49%	11.38%		

Western Oregon University
FY23 Projected Year-End
(Unaudited, non-GAAP, for management purposes only)
(in thousands)

As of February 28, 2023
For the Fiscal Year Ended June 30, 2023

	FY22 Year-End Actuals	FY23 Projected Year-End	FY23 Adjusted Budget	Variance FY23 Projected Year-End to Budget	Note
Auxiliary Enterprises Funds					
Enrollment Fees	5,683	5,039	5,608	(569)	
Sales and Services	10,836	10,428	10,964	(536)	
Other Revenue	2,309	3,063	2,001	1,062	
Total Revenues	18,828	18,530	18,573	(44)	
Personnel	9,654	10,632	10,592	(40)	
Service & Supplies	10,888	13,943	10,478	(3,465)	
Capital Expense	-	-	-	-	
Total Expenses	20,542	24,575	21,070	(3,505)	
Net Transfers	(2,827)	(2,173)	(1,461)	712,247.00	Projection is based on transfer schedule.
Total Expenses and Transfers	17,716	22,402	19,609	(2,793)	
Net Revenues less Expenses	1,112	(3,872)	(1,036)	(2,837)	
HEERF Funds	1,487	-	-	-	
Additions/Deductions to Fund Balance	(1,921)	(1,828)			
Fund Balance at the Beginning of the Year	6,339	7,017			
Fund Balance at the End of the Year	7,017	1,317			
Fund Balance as a Percentage of Revenues	37.27%	7.11%			
Designated Operations, Service Departments, Clearing Funds					
Enrollment Fees	34	-	48	(48)	
Sales and Services	140	143	127	16	
Other Revenue	1,965	2,215	2,078	137	
Total Revenues	2,139	2,359	2,253	105	
Personnel	781	698	1,019	321	
Service & Supplies	1,433	1,645	1,262	(384)	
Capital Expense	0	-	-	-	
Total Expenses	2,213	2,344	2,281	(63)	
Net Transfers	(46)	1	1	-	Projection is based on transfer schedule.
Total Expenses and Transfers	2,168	2,345	2,281	(63)	
Net Revenues less Expenses	(29)	14	(28)	(1)	
Additions/Deductions to Fund Balance	(277)	(241)			
Fund Balance at the Beginning of the Year	3,047	2,741			
Fund Balance at the End of the Year	2,741	2,515			
Fund Balance as a Percentage of Revenues	128.17%	106.63%			

Western Oregon University
Transfers Schedule - Projected FY23

(Unaudited, non-GAAP, for management purposes only)

	E&G		Auxiliary		Des Ops - Serv Dept.	Plant fund		Other			Total
Transfers In E&G								(a)	(b)	(b)	
Actual								-	299,487	-	299,487
Upcoming								8,893	-	150,000	158,893
Transfers Out E&G			(c)	(d)		(e)	(f)	(a)			
Actual			-	-		-	660,000	-			660,000
Upcoming			150,000	4,000,000		175,000	-	23,131			4,348,131
Transfers In AUX	(c)	(d)				(g)					
Actual	-	-				127,047					127,047
Upcoming	150,000	4,000,000				-					4,150,000
Transfers Out AUX						(g)		(h)			
Actual						-		-			-
Upcoming						128,372		1,975,371			2,103,743
Transfers In DO, SD											
Actual											-
Upcoming											-
Transfers Out DO, SD								(i)			
Actual								-			-
Upcoming								750			750

Type	Description
(a)	Miscellaneous (endowment matches, student vaccine initiative, etc.)
(b)	HEERF ARP SIP lost revenue reimbursement
(c)	Child Development Center support
(d)	Athletic operations support
(e)	Small-Scale Energy Loan Program debt service
(f)	Student Success Center XI-G match
(g)	Auxiliary transfers to/from building/equipment reserves
(h)	Misc. auxiliary transfers, including debt payments for Housing and Recreation Center Building Fee
(i)	Misc. designated operations and service departments transfers

Finance & Administration Committee (FAC), Tuition & Fees for 2023-24 Academic Year & Summer 2023

SUMMARY OF RECOMMENDED CHANGES IN TUITION AND FEES FOR 2023-24

Undergraduate:

- 3.09% increase to resident undergraduate tuition (\$6 per credit increase from \$194 to \$200 per credit)
- Flat non-resident undergraduate tuition (\$638 per credit)
 - Currently, our non-resident undergraduate tuition is 3.3 times our resident rate; keeping non-resident flat reduces that ratio to 3.2. Other Oregon public universities' non-resident tuition ranges from 2.6-3.2 times their resident rates.

Graduate:

- Flat graduate tuition (\$460 per credit)
 - Graduate tuition is assessed at the same rate regardless of residency.

Overall:

- An increase in the health service fee of \$8, bringing the fee to \$162 per term
 - Additionally, the fee will be assessed at \$120 per term to completely online/Salem-campus students (currently the fee is opt-in for students not taking any courses on the Monmouth campus).
- No increases to the building, student health building, student rec center building, and matriculation fees
- Online course fee remains at \$53/credit, to be charged to both undergraduate and graduate students based on online course modality
- 11.56% increase to incidental fee for on-campus students (\$43 per term increase from \$372 to \$415 per term)
 - 5% increase to incidental fee for fully online/off-campus students (\$10 per term increase from \$200 to \$210 per term)

Summer:

Summer 2023 tuition rates are included at the same rates as the 2023-24 academic year. Building and student rec center building fees are slightly less than the academic year (as is consistent with historical summer fees). The summer incidental fee increases by 20% (from \$125 to \$150) to reflect the difference in service level during summer.

Room and board rates:

Housing residence hall rates include a 2.5% increase. Dining rates reflect a 2.5% increase to meal plan overhead.

TUITION & FEE ADVISORY COMMITTEE

The Tuition & Fee Advisory Committee (TFAC)'s formal role is to advise the University President on the President's recommendation to the Board of Trustees regarding resident tuition and mandatory enrollment fees for the upcoming academic year. TFAC met five times over the course of winter term to learn about the University budget, how state funding is allocated, review financial projections as well as historical context, hear from the Student Health & Counseling Center, and learn about the overall tuition setting process. TFAC also conducting a campus-wide survey via their Portal and received 432 responses. Their recommendation letter is provided, along with the full survey results.

GRADUATE TUITION ADVISORY COMMITTEE

The Graduate Tuition Advisory Committee is composed of staff, faculty, and graduate students. Their recommendation as well as the Dean of Graduate Studies and Research's recommendation for graduate tuition are included.

TUITION & FEE ADVISORY COMMITTEE RECOMMENDATION

March 20, 2023

To: President Peters and the WOU Board of Trustees
Subj: Recommendation from the Tuition & Fee Advisory Committee

After several months of continuous meetings, gathering student input, and discussions as a Committee while trying to keep the student at the forefront of our minds, we recommend a resident undergraduate tuition rate increase of 3.09%, \$6 per credit hour. Alternatively, we were in support of a tuition plateau based on the current tuition rate of \$194 per credit, structured so that students taking 12-18 credits all pay the same rate where the price is set at the equivalent of 15 credits, in hopes to remove price as a barrier to taking more credits. However, we support taking another year to continue to research the tuition plateau and potential impacts to students before implementing such a structure.

In our student survey with 432 respondents, 313 students said that our current tuition rate of \$194/credit (for resident undergraduates) is the rate they would be most supportive of (Question 1). Additionally, we asked students to rank their priorities between affordability, access to health services, access to academic support, on-campus experiences, maintaining quality programs, and other (Question 5). 277 students ranked affordability as their top priority. On our student survey, we also asked students if they were in support of a tuition plateau (Question 2); 263 students responded yes.

We understand that the university has many financial pulls that continue to increase in cost. We also are aware that the university has developed a five-year sustainability plan that focuses on reducing expenses while trying to grow enrollment and come to a balanced budget so that the university no longer has to draw on their one-time reserves. As a result, our recommendation attempts to balance the needs to sustain the institution as well as the need for affordability for our students. While we recognize that a tuition increase is a component to university financial sustainability, enrollment is even more important.

Additionally, we recommend a 5.19%, \$8/term increase (from \$154 to \$162 per term) for health service fee. Currently students who do not take Monmouth campus courses do not pay this fee unless they opt in; we recommend making this a mandatory fee for completely online and Salem campus students charged at \$120 per term. The logic for this recommendation is that the majority of health services can be accessed remotely by online students.

STAFF RECOMMENDATION:

It is recommended that the Western Oregon University Finance and Administration Committee recommend to the Board that it approve the 2023-2024 Academic Year & 2023 Summer Session Tuition and Fee Book as presented.

ADDITIONAL INFORMATION

Resident UG Credit Rate	\$ Increase	% Increase	Estimated Change in Gross Tuition		
			Scenario 1 -5% Enroll	Scenario 2 -3% Enroll	Scenario 3 0% Enroll
194	-	0.00%	(1,466,827)	(880,419)	-
195	1	0.52%	(1,355,440)	(766,686)	117,251
196	2	1.03%	(1,224,136)	(632,616)	255,468
197	3	1.55%	(1,112,749)	(518,883)	372,719
198	4	2.06%	(981,445)	(384,813)	510,936
199	5	2.58%	(870,058)	(271,080)	628,187
200	6	3.09%	(738,754)	(137,010)	766,404
201	7	3.61%	(627,367)	(23,277)	883,655
202	8	4.12%	(496,063)	110,793	1,021,872
203	9	4.64%	(384,676)	224,526	1,139,123

Figure 1: Estimated change in gross tuition revenues for FY2023 for each respective resident undergraduate tuition rate given the various enrollment scenarios.

TFAC uses an interactive model while they are developing their recommendation. This model is two-fold, with the first estimating the impact on tuition revenues for the university of different enrollment and tuition rate scenarios that the individual can change, as well as projecting the ending fund balance.

Western Oregon University		Tuition and Fees Projection Model		UG Enrollment Assumption		University Revenue Impact	
						0.00%	
						0.00%	
	Current	Projected	FY24 Credit Rates			Projected	
	Credit Rates	FY24 Credits	% Increase	Rounded %	Rate	FY24	
Revenues							
UG Tuition							
UG Resident	194	96,285	3.09%	3.09%	200	19,257,000	
UG WUE/Texas	291	20,966			300	6,289,800	
UG Non-Resident	638	1,412	0.00%	0.00%	638	900,856	
GR Tuition	460	7,906	0.00%	0.00%	460	3,636,760	
Other		-				2,360,000	
Total Gross Tuition		126,569				32,444,416	
Online Fees						2,994,924	
Other Fees						950,000	
Fee Remissions						(5,500,000)	
Total Net Tuition & Fees			45.7%			30,889,340	
State Appropriations			48.5%			31,965,913	
Gifts Grants & Contracts						1,180,000	
Investment						2,000,000	
Sales & Services						500,000	
Other Revenues						100,000	
Total Revenues						66,635,253	
Expenses							
Personnel						60,032,723	
Service & Supplies						9,763,436	
Capital Expense						189,691	
Total Expenses						69,985,850	
Net Transfers						3,626,991	
Permanent expense reductions						(3,500,000)	
Total Expenses and Transfers						70,112,841	
Recurring Net Revenues less Expenses						(3,477,588)	
One Time Activites						-	
Net Revenues less Expenses						(3,477,588)	
Beginning Fund Balance						10,420,000	
Projected Ending Fund Balnce						6,942,412	
% of Revenues						10.42%	

Figure 2: A snapshot of TFAC's university revenue projection interactive model

The second piece of the TFAC model looks at the individual student and how that will impact their cost. The model allows the student to change the credit hour load as well as personalize their financial aid awards to see their net impact.

**Western Oregon University
Tuition and Fees Projection Model
Individual Impact Estimation**

13 UG Credit Hours (average 13/term)
9 GR Credit Hours (full-time 9/term)

	Current Credit Rates	FY24 Credit Rates	Tuition	Building	Health	Mandatory Fees* Incidental	Total 2023-24 Cost	Total 2022-23 Cost	Incr. for \$ Increase	Cont. Students % Increase
Undergrad:										
Resident	194	200	2,600	98	162	372	9,696	9,375	321	3.42%
WUE/Texas	291	300	3,900	98	162	372	13,596	13,158	438	3.33%
Non-Resident	638	638	8,294	98	162	372	26,778	26,691	87	0.33%
Graduate	460	460	4,140	98	162	372	14,316	14,229	87	0.61%

***Mandatory Fee Assumptions**

Building Fees includes \$45 Building Fee (staggered for less than full-time), \$11 Student Health Building Fee, and \$42 Student Recreation Center Building Fee
Health Service Fee is currently \$154, assessed at in-person Credit 1
Incidental Fee is currently at \$372 assessed at Credit 1 for in-person, \$200 for completely online/Salem students; determined by the Incidental Fee Comm

Out-of-Pocket Cost Analysis (Resident Undergrad):

Total Tuition & Fees	9,696	Financial Aid Award Package based on Total Cost of Attendance https://wou.edu/admission/tuition-and-aid/
Aid:		
Pell	6,895	Approx. 40% of our students are Pell-eligible; maximum is \$6,895
Oregon Opportunity Grant	-	Maximum is \$4,692
Federal Direct Loans	5,500	Maximum for first-year dependent student is \$5,500
Parent PLUS Loans	-	Maximum for first-year student is \$9,500
Private Scholarships	1,000	WOU Scholarships, or external private scholarships
WOU Fee Remissions	1,500	Varies by individual; some students receive up to \$6,000, average award is \$1,500
Total Aid (including loans)	14,895	
Net Cost/(Refund)	(5,199)	Students also need to pay for housing/other bills

Some examples of Fee Remissions:

Presidential (Merit)	1,000-5,000	Starting at 3.5 GPA
New Student Merit	1,000-5,000	Starting at 3.0 GPA; for incoming students Fall 2022
Bilingual Teacher Scholarship	3,000	
Diversity Commitment	6,000	

Full details can be found here: <https://wou.edu/finaid/scholarships/incoming-students/>

Figure 3: A snapshot of TFAC's individual impact estimation interactive model

The graphs and figures below were presented to TFAC to provide additional context related to tuition and fees.

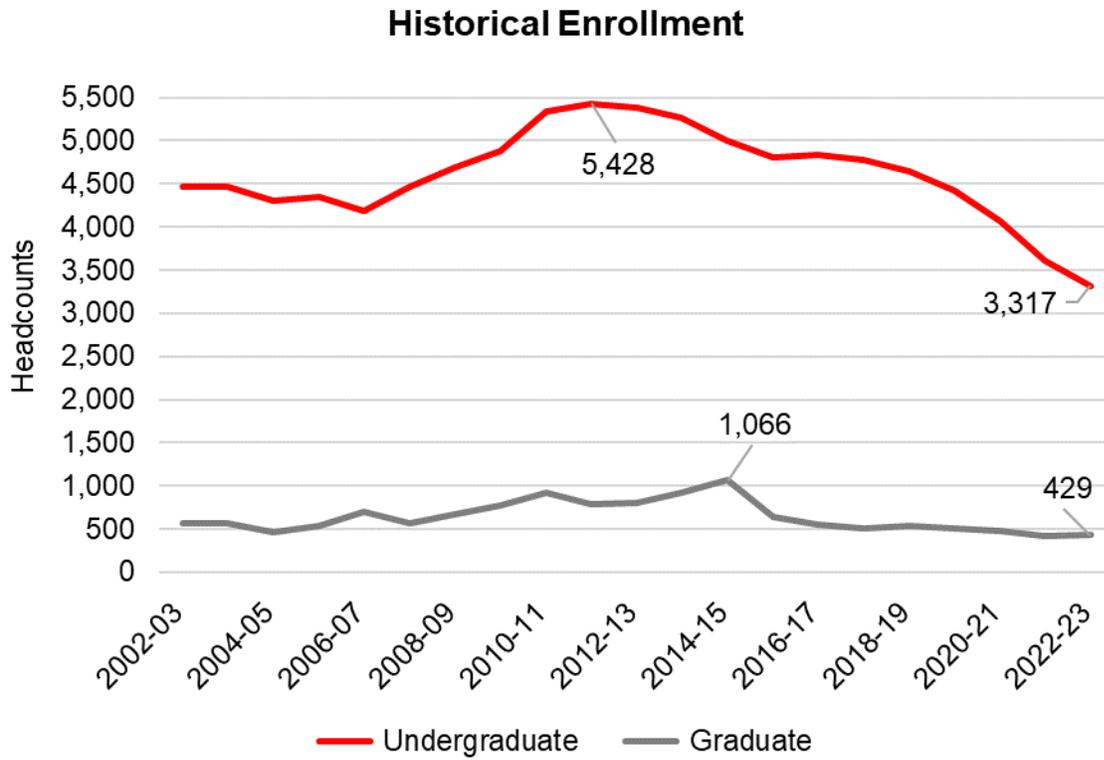


Figure 4: Historical enrollment headcounts (fall-term census)

Historical E&G Revenues

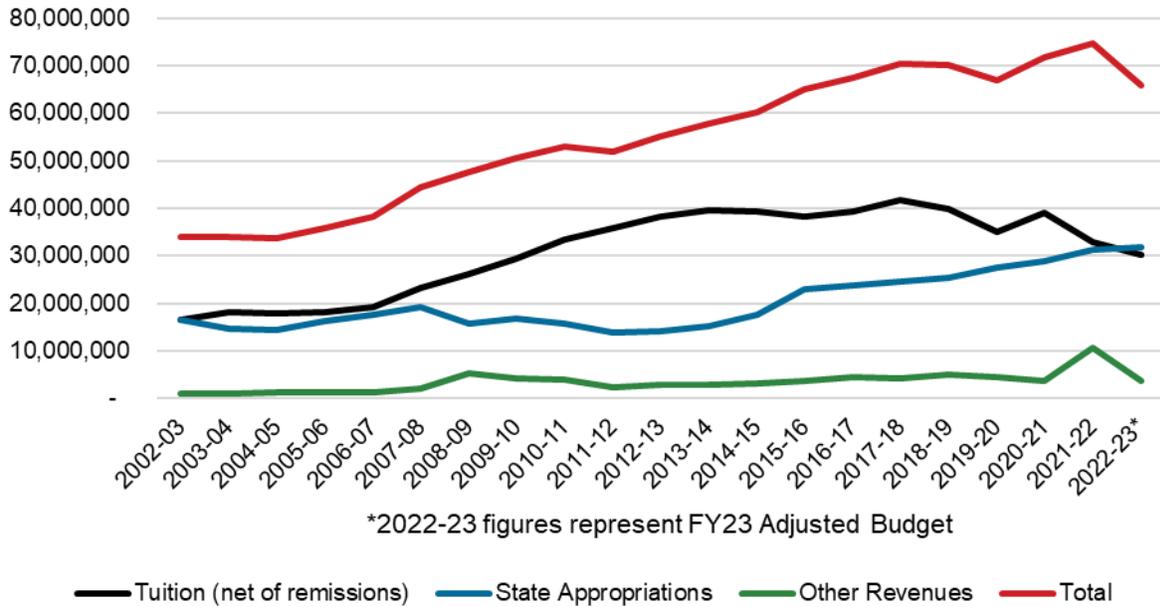


Figure 5: Historical Education & General fund revenues

Historical E&G Expenses

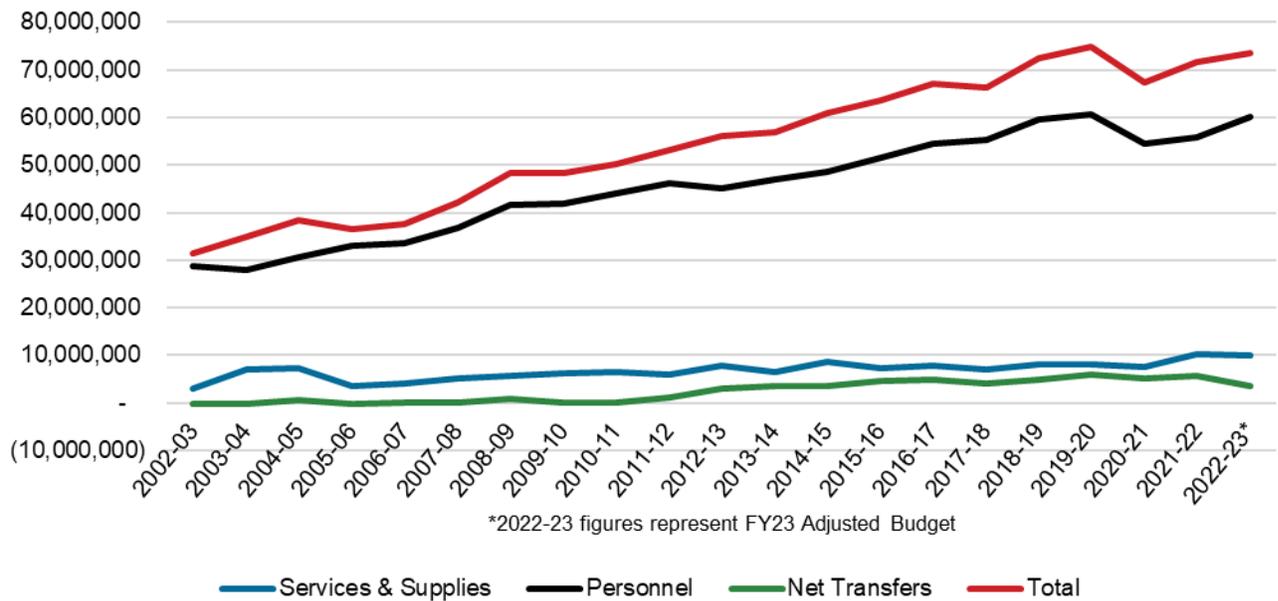


Figure 6: Historical Education & General fund expenses

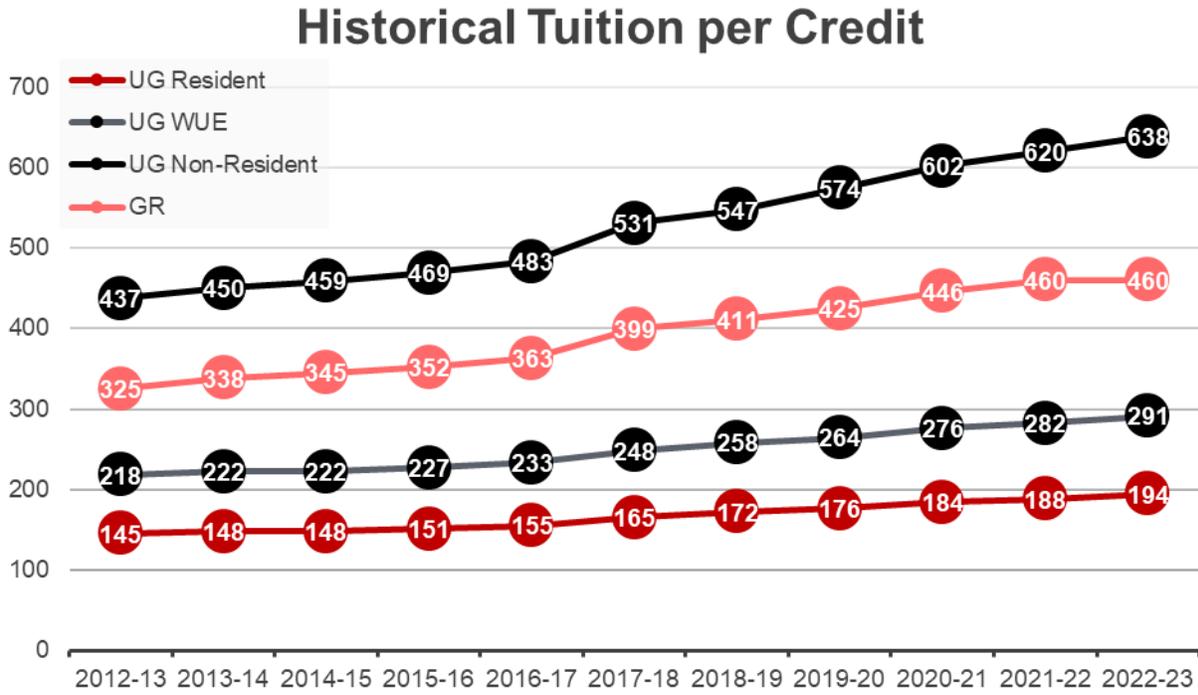


Figure 7: Historical tuition rate per credit

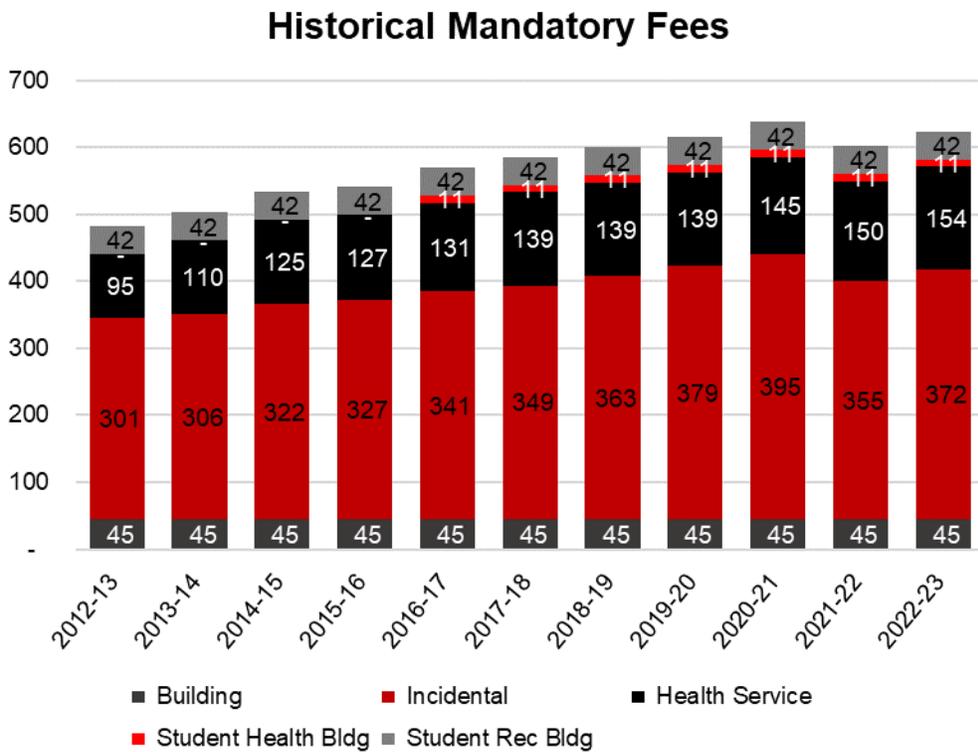


Figure 8: Historical mandatory fees

Oregon Public Universities 2022-23 Cost Comparison

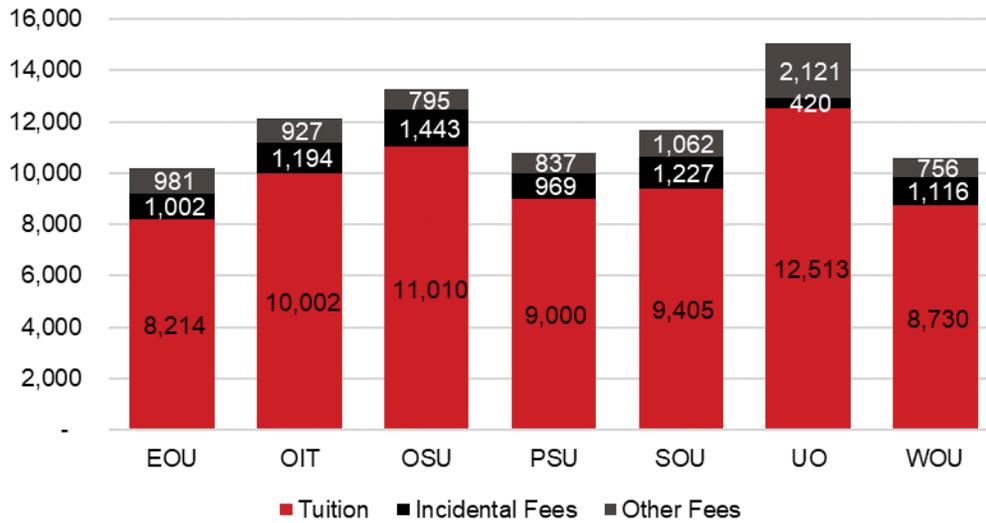
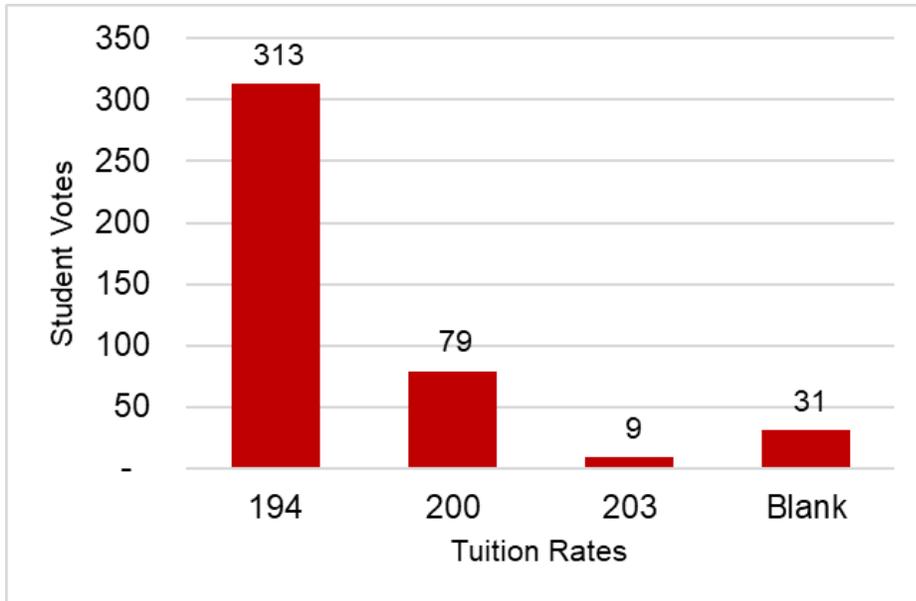


Figure 9: Oregon public universities' cost comparison for resident undergraduate (assumes 15 credits/term)

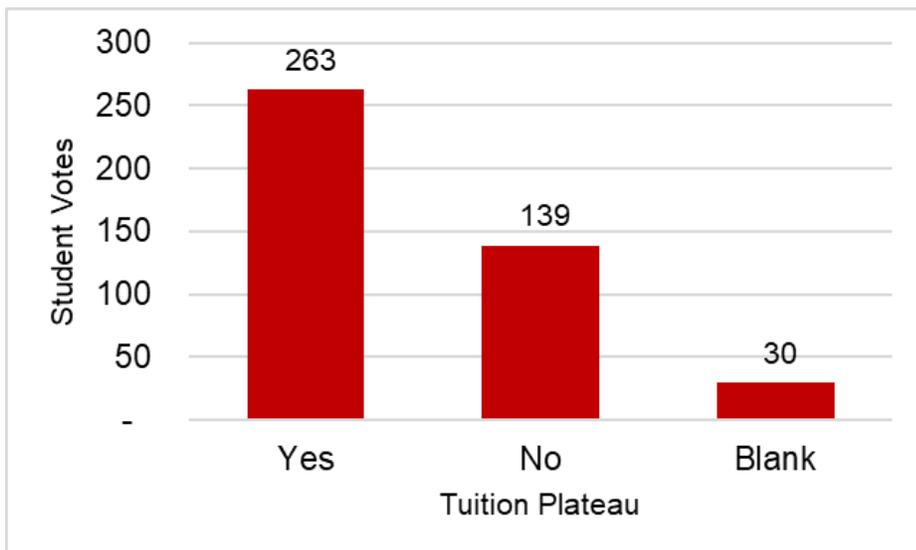
TFAC CAMPUS-WIDE SURVEY RESULTS

Total Responses: 432

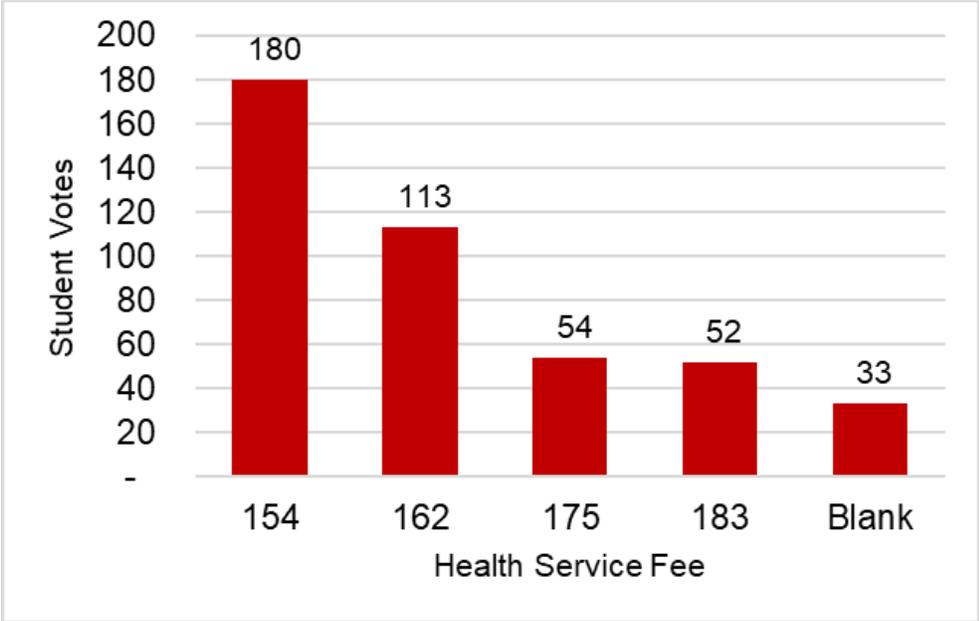
Question 1: The students and faculty of the Tuition and Fee Advisory Committee (TFAC) are considering the following options to recommend to the President for the resident undergraduate tuition rate increase next year -- which would you be most supportive of?



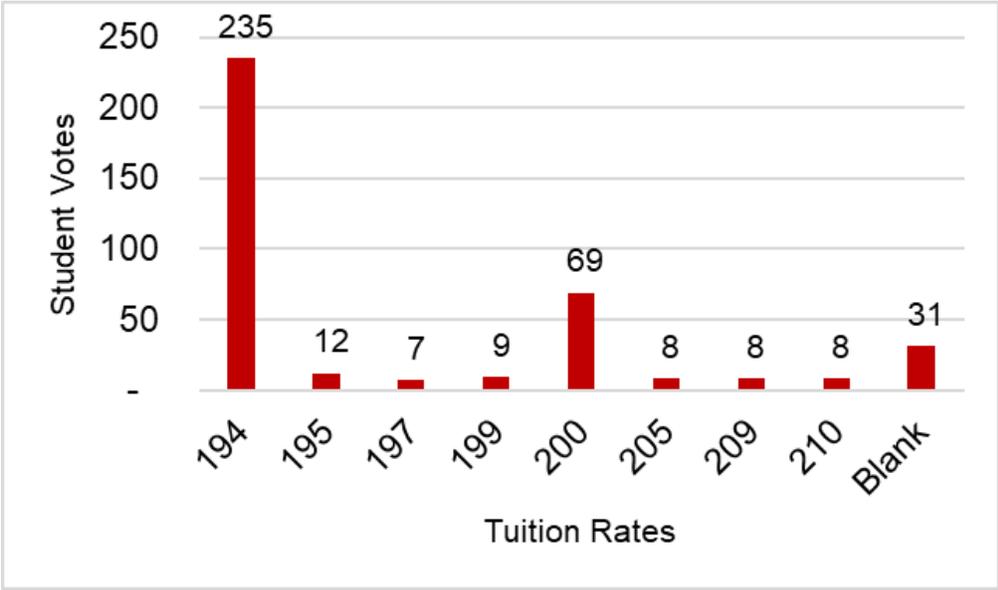
Question 2: Would you support a tuition plateau structure?



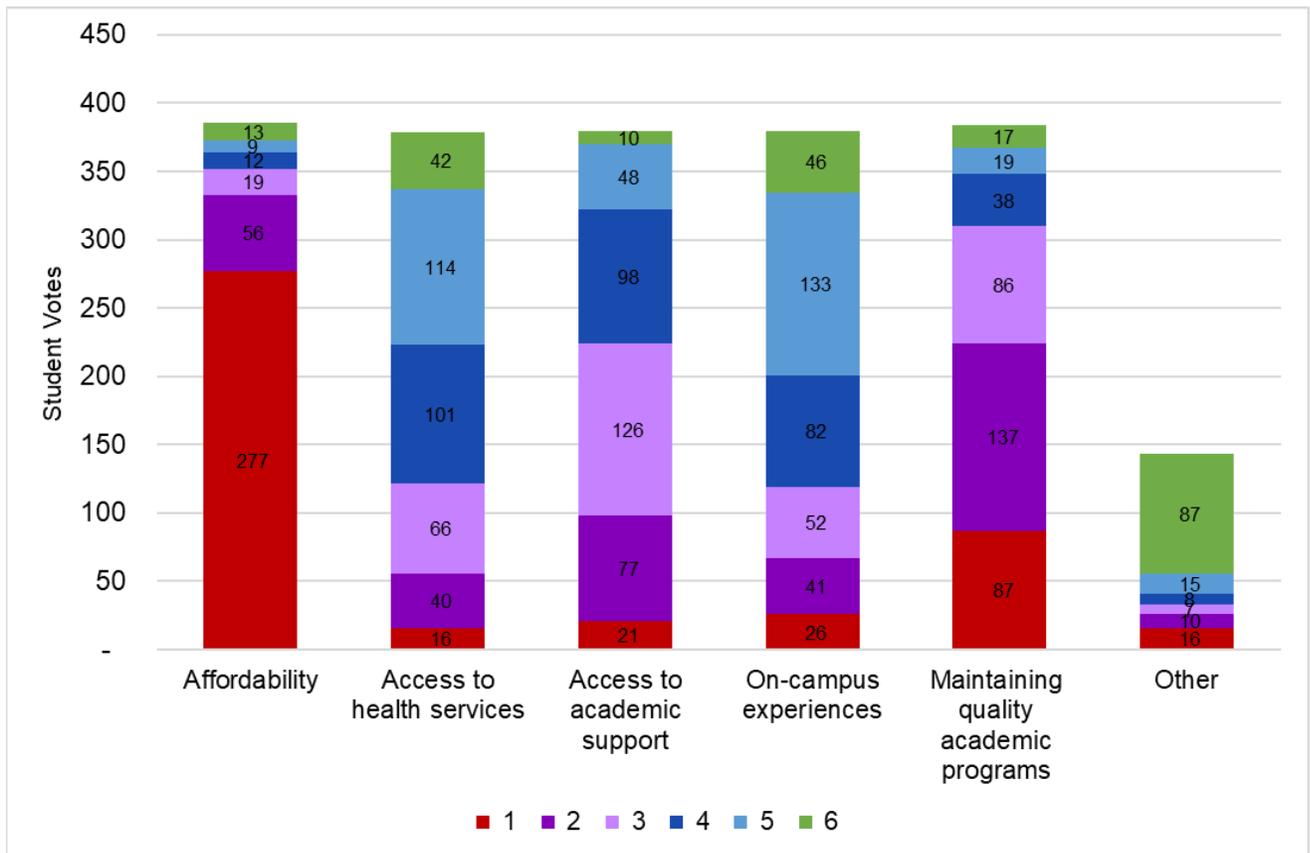
Question 3: What is the maximum fee you would pay for the Student Health and Counseling Center?



Question 4: What is the maximum per credit you would pay for your WOU classes?



Question 5: Please rank your priorities for next year from 1 (highest) to 6 (lowest):



Other responses:

- Access to student recreation and club sports
- Advisor help
- Affordability
- Affordable on-campus housing
- ATHLETICS
- Athletics
- Better cafeteria food
- Better food options in Valsetz
- Bring back Library Starbies
- campus gym
- Career Fairs
- decent food
- Excellent professors
- Faculty Payment, and Resources for them
- family priorities
- Financial Aid/Work

Financial survival

Free parking

Getting into Arbor Park so I don't have to pay for a meal plan

Getting rid of Dax - it was an unnecessary addition if you were already struggling with money

graduating

Graduation Prep and Advisement

gym

Health and wellness center

IFC Funding

Increase our fees so that we can open up the R&R room please! Make students aware of the changes

increased quality of classes/education neighboring OSU or U of O style of education.

Make western a better school. Offer more for students

More online courses for full time parents and employees

n/a

N/A

n/a

n/a

N/A

Online class availability

online classes

online options

Parking

prices already are too high please don't raise them. Students are drowning.

Rec center

rent/gas

The gym

To develop a depth and breadth of understanding using a schooling model built on evidence.

Website design

WRITING SUPPORT

To: Dr. Ana Karaman, VP for Finance & Administration

From: Dr. Hillary Fouts, Dean of Graduate Studies and Research

Date: February 27, 2023

Re: Recommendation for 2023-2024 Graduate Tuition and Fees

Dear Dr. Karaman,

In January 2023, I convened the Graduate Tuition and Fee Committee to provide recommendations to me on Graduate Tuition and Fee rates for the 2023-2024 academic year. The committee was made up of two current graduate students, two faculty representatives from the Graduate Studies Committee, and a representative from the Graduate Programs staff. The committee was only charged with making recommendations on the master's level tuition rate for AY23-24.

The committee reviewed comparative data of the tuition and fee rates at the other Oregon Public Universities, which was prepared by the Director of Budget and Planning, Camarie Moreno. The committee expressed concern that our online graduate tuition and fee rates are not the most affordable option in Oregon and in fact, WOU is very close to the overall costs of online graduate rates at OSU and PSU. They concluded that in order to effectively recruit and retain students, WOU cannot afford to increase our tuition rate this point in time. Furthermore, the committee projected that there was a strong likelihood that the incidental fee would increase for AY23-24. Thus, the committee has recommended that graduate tuition remain at \$460 per credit for AY23-24. I am attaching a memo from the committee that describes their rationale and also includes the data that they considered. I support the committee's recommendation and agree that master's level graduate tuition should remain at \$460 per credit for AY23-24.

I appreciate the opportunity to provide a recommendation. Please let me know if you have any questions or would like to further discuss graduate tuition.

CC: Dr. Robert Winningham, Provost and VP for Academic Affairs

Attachment: Graduate Tuition and Fee Committee Recommendation for AY23-24

Memorandum

To: Dr. Hillary Fouts, Dean of Graduate Studies and Research

From: Amanda Smith, Program Coordinator of Master of Arts in Interpreting Studies
 Amber Deets, Director of Graduate Student Success and Recruitment
 Dr. David Foster, Program Coordinator of Master of Arts in Organizational Leadership
 Lory Cruz-Esquivel, Graduate Student of Master of Science in Education
 Alexis Ferdig, Graduate Student of Master of Arts in Interpreting Studies

Date: February 27, 2023

Re: Recommendation for Tuition Formula for the 2023-2024 Academic Year

The recommendation of the Graduate Tuition Advisory Committee was formulated based on ensuring the sustainability of these programs through enhanced enrollment and retention.

The Graduate Tuition Advisory Committee reviewed tuition and fee structures at the other Oregon public universities (OPUs). Below is the information discussed:

2022-2023 Tuition and Fee Rates at OPUs

	Tuition	Incidental Fees	Other Fees	Total Fees	Total Cost
In-person rates/fees, per term					
EOU	-	-	-	-	-
OIT	4,601	398	303	701	5,301
OSU - Cascades	4,482	375	146	521	5,003
OSU	4,482	481	265	746	5,228
PSU	4,104	323	279	602	4,706
SOU	4,725	409	343	752	5,477
UO	5,337	140	688	828	6,165
WOU	4,140	372	252	624	4,764

Online rates/fees, per term					
EOU	4,595	-	-	-	4,595
OIT	3,762	-	195	195	3,957
OSU	5,040	-	-	-	5,040
PSU	4,104	323	477	800	4,904
SOU	4,725	-	675	675	5,400
UO	5,337	70	98	168	5,505
WOU	4,140	200	477	677	4,817

The committee discussed WOU rates relative to the OPUs and came to the conclusion that the cost of graduate education at WOU is too close to the costs of competitor institutions for WOU to effectively recruit and retain adequate graduate enrollment to be sustainable.

As such, the Graduate Tuition Advisory Committee recommends that graduate students pay no more than \$460 per credit for online or in person graduate courses.



Western Oregon
UNIVERSITY

2023 – 2024 Academic Year &
2023 Summer Session
Tuition and Fee Book

Adopted by Western Oregon University Board of Trustees at the April __, 2023, meeting. All prior tuition and fee books are superseded except as to the rights and obligations previously acquired or incurred therein.

2023-24 ACADEMIC YEAR & SUMMER 2023 TUITION

Credits	Undergraduate			Graduate
	Resident	WUE/Texas	Non-Resident	
1	200	300	638	460
2	400	600	1,276	920
3	600	900	1,914	1,380
4	800	1,200	2,552	1,840
5	1,000	1,500	3,190	2,300
6	1,200	1,800	3,828	2,760
7	1,400	2,100	4,466	3,220
8	1,600	2,400	5,104	3,680
9	1,800	2,700	5,742	4,140
10	2,000	3,000	6,380	4,600
11	2,200	3,300	7,018	5,060
12	2,400	3,600	7,656	5,520
13	2,600	3,900	8,294	5,980
14	2,800	4,200	8,932	6,440
15	3,000	4,500	9,570	6,900
16	3,200	4,800	10,208	7,360
17	3,400	5,100	10,846	7,820
18	3,600	5,400	11,484	8,280
<i>Each Add'l Credit Hour</i>	200	300	638	460

Notes:

(1) Tuition for undergraduate students under the Western Undergraduate Exchange (WUE) program or who are from Texas is assessed at 150% of the resident tuition rate.

(2) Tuition rates apply to all courses regardless of modality (face-to-face, hybrid, online) or location (Monmouth, Salem).

MANDATORY FEES – ACADEMIC YEAR

Credits	Undergraduate Mandatory Fees					
	Building	<u>Incidental</u>	<u>Health Service</u>	Student Health Bldg	Student Rec Ctr Bldg	Total
1	23	415	162	11	42	653
2	25	415	162	11	42	655
3	27	415	162	11	42	657
4	29	415	162	11	42	659
5	31	415	162	11	42	661
6	33	415	162	11	42	663
7	35	415	162	11	42	665
8	37	415	162	11	42	667
9	39	415	162	11	42	669
10	41	415	162	11	42	671
11	43	415	162	11	42	673
12 or more	45	415	162	11	42	675

Notes:

- (1) A one-time Matriculation Fee of \$365 is assessed to all new and transfer undergraduate students.
- (2) Online courses are subject to an online course fee of \$53 per credit.
- (3) Building, Student Health Bldg, and Student Rec Ctr Bldg fees are based on Monmouth campus credit hours.
- (4) Students not enrolled at the Monmouth campus are assessed a discounted incidental fee of \$210 and may opt into the Student Rec Ctr Bldg fee to access the Health & Wellness Center.
- (5) Students not enrolled at the Monmouth campus are assessed a discounted Health Service Fee of \$120.

MANDATORY FEES – ACADEMIC YEAR (cont.)

Credits	Graduate Mandatory Fees (Monmouth Campus only)					
	Building	<u>Incidental</u>	<u>Health Service</u>	Student Health Bldg	Student Rec Ctr Bldg	Total
1	23	415	162	11	42	653
2	25	415	162	11	42	655
3	27	415	162	11	42	657
4	29	415	162	11	42	659
5	31	415	162	11	42	661
6	33	415	162	11	42	663
7	35	415	162	11	42	665
8	37	415	162	11	42	667
9 or more	45	415	162	11	42	675

Credits	Graduate Mandatory Fees (WOU:Salem only)		
	<u>Incidental</u>	<u>Health Service</u>	Total
1 or more	210	120	330

Credits	Graduate Mandatory Fees (Online only)			
	<u>Incidental</u>	<u>Health Service</u>	Online	Total
1 or more	210	120	53 per credit	Calculated by credit

Notes:

- (1) A one-time Matriculation Fee of \$315 is assessed to all new and transfer graduate students.
- (2) Online courses are subject to an online course fee of \$53 per credit.
- (3) Building, Student Health Bldg, and Student Rec Ctr Bldg fees are based on Monmouth campus credit hours.
- (4) Students not enrolled at the Monmouth campus are assessed a discounted incidental fee of \$210 and may opt into the Student Rec Ctr Bldg fee to access the Health & Wellness Center.
- (5) Students not enrolled at the Monmouth campus are assessed a discounted Health Service Fee of \$120.

MANDATORY FEES – SUMMER 2023

Credits	Undergraduate & Graduate Mandatory Fees					Total
	Building	Incidental	Health Service	Student Health Bldg	Student Rec Ctr Bldg	
1 or more	34	150	162	11	35	392

Notes:

- (1) A one-time Matriculation Fee of \$365 for undergraduate and \$315 for graduate is assessed to all new and transfer students.
- (2) Online courses are subject to an online course fee of \$53 per credit.
- (3) Building, Student Health Bldg, and Student Rec Ctr Bldg fees are based on Monmouth campus credit hours.
- (4) Students not enrolled at the Monmouth campus are assessed the incidental fee of \$150 and may opt into the Student Rec Ctr Bldg fee to access the Health & Wellness Center.
- (5) Students not enrolled at the Monmouth campus may opt into the Health Service fee for associated service.

MANDATORY FEES – DESCRIPTION

Fee	Description
Building	This fee is allocated to pay debt service associated with past construction and renovation projects on the WOU campus. Any additional funds collected are put into a reserve or used for small construction projects. The building fee is a mandatory fee assessed to all students taking 1 or more credit hours on the Monmouth campus and varies depending on the number of credits a student is enrolled in.
Incidental	This fee funds services such as Abby’s House, Food Pantry, Access, ASWOU, Athletics, Campus Recreation, Childcare, Creative Arts, Student Engagement, Student Activities Board, Student Media, and WOLF Ride. The Incidental Fee Committee is responsible for recommending the amount and allocation of the incidental fee to ASWOU and the President. The incidental fee is a mandatory fee assessed to all students.
Health Service	The fee is in place to support all the services offered by the Student Health & Counseling Center. The health service fee is a mandatory fee assessed to all students.
Student Health Building	This fee is allocated to pay debt service associated with the construction of the Student Health & Counseling Center building. This fee is a mandatory fee assessed to all students taking 1 or more credit hours on the Monmouth campus. This fee began Fall 2016 and will end Spring 2031.
Student Recreation Center Building	This fee is allocated to pay debt service associated with the construction of the Health & Wellness Center. This fee is a mandatory fee assessed to all students taking 1 or more credit hours on the Monmouth campus. This fee began Spring 2010 and will end Spring 2039.
Matriculation (one-time fee)	The matriculation fee is mandatory for all new undergraduate, graduate, and postbaccalaureate students. The fee is \$365 for undergraduates and \$315 for graduates; this is a one-time fee billed at the beginning of your first term at WOU.

Online courses have an additional fee of \$53 per credit.

UNIVERSITY HOUSING AND CAMPUS DINING

	Room and Board Rates				
		Annual	Fall	Winter	Spring
Landers	Standard Double (2 people/2 person room)	5,880	2,058	2,058	1,764
	Single (1 person/1 person room)	7,763	2,717	2,717	2,329
	Super Single (1 person/2 person room)	8,448	2,957	2,957	2,534
Ackerman & Heritage	Standard Double (2 people/2 person room)	6,745	2,361	2,361	2,023
	Single (1 person/1 person room)	7,763	2,717	2,717	2,329
	Super Single (1 person/2 person room)	8,448	2,957	2,957	2,534
Barnum	Triple (3 people/3 person room)	5,880	2,058	2,058	1,764
	Deluxe Double (2 people/3 person room)	7,290	2,552	2,552	2,186
	Super Single (1 person/3 person room)	8,903	3,116	3,116	2,671
Arbor Park	Individual Rate for shared apt. (4 people/apt.)	7,585	2,655	2,655	2,275
Meal Plans (Dining Overhead + Meal Plan Option)	Dining Overhead	2,615	915	915	785
	Resident Meal Plan #1	1,350	450	450	450
	Resident Meal Plan #2	1,800	600	600	600
	Resident Meal Plan #3	2,250	750	750	750
	Resident Meal Plan #4	3,150	1,050	1,050	1,050

Notes:

(1) Room rates and dining overhead to be charged 35% in fall and winter terms and 30% in spring term. Meal plan dollars to be distributed evenly each term.

(2) Students residing in Landers, Heritage, Ackerman, and Barnum must select a meal plan and are charged dining overhead of \$2,615. Meal plans (and resulting dining overhead) are optional for students in Arbor Park.

(3) Rates include data line, wireless network, and movie streaming service when on-campus.

UNIVERSITY HOUSING AND CAMPUS DINING (cont.)

Family Housing	Knox Street Housing	745/month
	Alderview Townhouse	990/month interior unit; 1,020/month exterior unit

Notes:
 (1) Knox: Includes utilities, internet through Minet fiber, free laundry in community laundry room.
 (2) Alderview: Includes utilities, campus internet/data line, wireless access, movie streaming service when on-campus, and in-unit washer and dryer.
 (3) Family Housing does not include meal plans.



Western Oregon
UNIVERSITY

2023 – 2024 Special Course Fees and General Services Book

SPECIAL COURSE FEES

<i>Course #</i>	<i>Subject Title</i>	<i>Fee</i>
Art		
A 100	Art Topics: Various	25.00
A 115	Beginning Design: Two-dimensional	40.00
A 116	Beginning Design: Three-dimensional	35.00
A 120	Beginning Digital Art & Design	40.00
A 130	Beginning Drawing	20.00
A 199	Special Studies	20.00
A 204	Art History: Prehistoric through Late Antiquity	10.00
A 205	Art History: Middle Ages through Renaissance	10.00
A 206	Art History: Baroque through Contemporary	10.00
A 210	Art for Health	20.00
A 220	Introduction to Typography	35.00
A 230	Introduction to Life Drawing	65.00
A 250	Introduction to Ceramics	80.00
A 262	Digital Images & Photography I	85.00
A 270	Introduction to Printmaking	100.00
A 280	Introduction to Painting	60.00
A 290	Introduction to Sculpture	80.00
A 304	History of Modern Art, 1789-1914	10.00
A 305	History of Modern Art, 1914-1965	10.00
A 306	History of Modern Art, 1965-Present	10.00
A 308	History of Graphic Design	15.00
A 311	Creativity and Idea Generation	40.00
A 314	Intermediate 2D Design International	50.00
A 315	Intermediate Design: Two-Dimensional	35.00
A 316	Intermediate Design: Three-Dimensional	35.00
A 318	Gallery Internship	25.00
A 320	Graphic Design: Process & Theory	40.00
A 321	Graphic Design: Form and Communication	40.00
A 322	Graphic Design: Contemporary Issues	40.00
A 323	Art & Design for the Internet	40.00
A 324	Interactive Media: Applied	40.00
A 326	Video & Animation I	70.00
A 327	Video & Animation II	70.00
A 329	Graphic Design: Systems & Technique	40.00
A 330	Drawing: Explorations	55.00
A 331	Drawing: as Communication	55.00
A 350	Ceramics: Methodologies	80.00
A 351	Ceramics: Construction and Process	80.00
A 352	Ceramics: Form and Function	80.00
A 370	Printmaking: Simple Intaglio	100.00
A 371	Screen Printing	100.00

SPECIAL COURSE FEES

<i>Course #</i>	<i>Subject Title</i>	<i>Fee</i>
Art		
A 372	Relief Printmaking	100.00
A 380	Painting: from Observation	60.00
A 381	Painting: Mixed Media	60.00
A 382	Painting: Watercolor	60.00
A 383	Illustration: Technique & Narrative	70.00
A 390	Sculpture: Techniques and Methods	80.00
A 391	Sculpture: Material Exploration	80.00
A 392	Sculpture: Conceptual Development	80.00
A 399	Special Studies	20.00
A 404	Art History: Non-Western Art	10.00
A 405	Art History: Gender in Art	10.00
A 406	Art History: Special Topics	10.00
A 410	Critique & Seminar	60.00
A 411	Workshop	20.00
A 412	Practicum	20.00
A 413	International Studio Art Study	20.00
A 419	Professional Concerns	50.00
A 421	Type Design: Structural and Expressive	40.00
A 422	Advanced Topics in Graphic Design & Communication	40.00
A 425	Interactive Media: Contemporary Issues	20.00
A 429	Portfolio & Professional Preparation	50.00
A 430	Digital Drawing from Observation	70.00
A 434	Advanced Life Drawing	65.00
A 445	B.F.A. Thesis Project: Visual Communication Design	60.00
A 450	Ceramics: Visual Exploration	80.00
A 451	Ceramics: Formulation of Components, Relationships and Structures	80.00
A 452	Ceramics: Expanding Practices	80.00
A 455	B.F.A. Thesis Project: Ceramics	80.00
A 462	Digital Images & Photography II	85.00
A 468	Art & Technology Workshop	85.00
A 470	Printmaking: Etching	100.00
A 471	Printmaking: Lithography	100.00
A 472	Printmaking: Monoprints	100.00
A 475	B.F.A. Thesis Project: Printmaking	100.00
A 480	Painting: Figure	60.00
A 481	Painting: Methods of the Masters	60.00
A 482	Painting: Contemporary Issues	60.00
A 483	Illustration: Digital Tools & Concepts	70.00
A 485	B.F.A. Thesis Project: Painting	60.00

SPECIAL COURSE FEES

Course #	Subject Title	Fee
Art		
A 490	Sculpture: Spatial Relations	80.00
A 491	Sculpture: Fabrication	80.00
A 492	Sculpture: Contemporary Issues	80.00
A 495	B.F.A. Thesis Project: Sculpture	80.00
A 499	Special Individual Studies	20.00
A 603	Thesis or Field of Study	20.00
A 604	Graduate Art History	20.00
A 610	Graduate Seminar	20.00
A 611	Graduate Workshop	20.00
A 615	Graduate Design: Two-Dimensional	30.00
A 616	Graduate Design: Three-Dimensional	35.00
A 620	Graduate Graphic Design	45.00
A 630	Graduate Drawing	20.00
A 635	Graduate Life Drawing	65.00
A 655	Graduate Ceramics	80.00
A 670	Graduate Printmaking	100.00
A 676	Aesthetic Foundations of Visual Arts	20.00
A 677	Contemporary Problems in Visual Art	20.00
A 680	Graduate Painting	55.00
A 690	Graduate Sculpture	80.00
A 699	Special Individual Studies: Graduate	20.00
<i>Charge for any Art course not listed is 20.00</i>		
<i>Creative Arts Differential Fee of 17.00/credit for all A, ARE, D, MUE, MUEN, MUS, and TA (excludes MUP) courses.</i>		
Art Education		
ARE 433	Art Education	30.00
<i>Creative Arts Differential Fee of 17.00/credit for all A, ARE, D, MUE, MUEN, MUS, and TA (excludes MUP) courses.</i>		
Biology		
BI 101L	Lab: General Biology	30.00
BI 102L	Lab: General Biology	30.00
BI 103L	Lab: General Biology	30.00
BI 131	Field Ecology	45.00
BI 134L	Lab: Introductory Human Anatomy and Physiology	30.00
BI 135L	Lab: Introductory Human Anatomy and Physiology	30.00
BI 143	Marine Biology	45.00
BI 211L	Lab: Principles of Biology	40.00
BI 212L	Lab: Principles of Biology	40.00
BI 213L	Lab: Principles of Biology	40.00

SPECIAL COURSE FEES

Course #	Subject Title	Fee
Biology		
BI 224	Health and Human Evolution	15.00
BI 234L	Lab: Human Anatomy and Physiology	35.00
BI 235L	Lab: Human Anatomy and Physiology	35.00
BI 236L	Lab: Human Anatomy and Physiology	35.00
BI 237L	Lab: Introductory Microbiology	40.00
BI 315L	Lab: Cell Biology	45.00
BI 316	Evolution	15.00
BI 317L	Lab: Vertebrate Natural History	50.00
BI 321L	Lab: Systematic Field Botany	50.00
BI 324L	Lab: Comparative Vertebrate Anatomy	65.00
BI 330L	Lab: Plant Physiology	35.00
BI 331L	Lab: General Microbiology	45.00
BI 334L	Lab: Advanced Human Anatomy and Physiology	35.00
BI 335L	Lab: Advanced Human Anatomy and Physiology	35.00
BI 336L	Lab: Advanced Human Anatomy and Physiology	35.00
BI 340L	Lab: Plant Nutrition	35.00
BI 343L	Lab: Analysis of Biological Data	4.00
BI 357L	Lab: General Ecology	50.00
BI 360L	Lab: Animal Behavior	80.00
BI 361L	Lab: Marine Ecology	50.00
BI 370L	Lab: Humans and the Environment	50.00
BI 371L	Lab: Structure of Seed Plants	35.00
BI 407	Seminar	35.00
BI 408	Workshop	35.00
BI 419	Biology Teaching Practicum	15.00
BI 424	Human Dissection	35.00
BI 425L	Ornithology	80.00
BI 426L	Lab: Genes and Development	75.00
BI 432L	Lab: Immunology	45.00
BI 434L	Lab: Comparative Animal Physiology	35.00
BI 451L	Lab: Invertebrate Zoology	50.00
BI 454L/554L	Lab: Plant Ecology	50.00
BI 457	Special Topics in Biology I	50.00
BI 458	Special Topics in Biology II	50.00
BI 459	Special Topics in Biology III	50.00
BI 460	Special Topics in Biology IV	50.00
BI 474L	Lab: Biology of Insects	55.00
BI 624	Human Dissection	35.00

SPECIAL COURSE FEES

Course #	Subject Title	Fee
Chemistry		
CH 103L	Lab: Allied Health Chemistry	55.00
CH 104L	Lab: Chemistry and the Environment	55.00
CH 105L	Lab: Consumer Chemistry	55.00
CH 106L	Lab: Scientific Advances in Medicine	55.00
CH 161L	Lab: Crime Scene Analysis	75.00
CH 221L	Lab: General Chemistry plus 20.00 goggle fee	55.00
CH 222L	Lab: General Chemistry	55.00
CH 223L	Lab: General Chemistry	55.00
CH 311L	Lab: Inorganic Chemistry	65.00
CH 312L	Lab: Analytical Chemistry	65.00
CH 313L	Lab: Instrumental Analysis	65.00
CH 320L	Lab: Introduction to Forensic Science	65.00
CH 334L	Lab: Organic Chemistry plus 20.00 goggle fee	65.00
CH 335L	Lab: Organic Chemistry	65.00
CH 336L	Lab: Organic Chemistry	65.00
CH 350	Chemical Literature	55.00
CH 365L	Lab: Material Chemistry	65.00
CH 420L	Forensic Laboratory Techniques and Documentation	75.00
CH 430	Applications of Forensic Science	75.00
CH 440L	Lab: Physical Chemistry I	75.00
CH 450L	Lab: Biochemistry I	75.00
CH 461/461W	Experimental Chemistry	75.00
CH 471L	Lab: Chemistry Instrumentation	75.00
<i>Breakage will be assessed at replacement cost</i>		

Creative Arts

Creative Arts Differential Fee of 17.00/credit for all A, ARE, D, MUE, MUEN, MUS, and TA (excludes MUP) courses.

SPECIAL COURSE FEES

Course #	Subject Title	Fee
Dance		
D 101	Beginning Ballet	10.00
D 102	Beginning Jazz Dance	10.00
D 103	Beginning Modern Dance	10.00
D 104	Beginning Tap Dance	10.00
D 170/170D	World Dance: Salsa	10.00
D 171/171D	World Dance: Hula	10.00
D 172/172D	World Dance: African	10.00
D 177	Beginning Hip-Hop	10.00
D 280	Intermediate Modern Dance - 1	10.00
D 281	Intermediate Modern Dance - 2	10.00
D 282	Intermediate Modern Dance - 3	10.00
D 285	Intermediate Ballet - 1	10.00
D 286	Intermediate Ballet - 2	10.00
D 287	Intermediate Ballet - 3	10.00
D 288	Intermediate Jazz Dance - 1	10.00
D 289	Intermediate Jazz Dance - 2	10.00
D 290	Intermediate Jazz Dance - 3	10.00
D 301	Pointe Technique 1	10.00
D 302	Pointe Technique 2	10.00
D 303	Pointe Technique 3	10.00
D 340	Conditioning for Dancers	15.00
D 380	Pre-Advanced Modern Dance - 1	10.00
D 381	Pre-Advanced Modern Dance - 2	10.00
D 382	Pre-Advanced Modern Dance - 3	10.00
<i>Creative Arts Differential Fee of 17.00/credit for all A, ARE, D, MUE, MUEN, MUS, and TA (excludes MUP) courses.</i>		
Deaf and Hard of Hearing Education		
DHHE 639	Student Teaching I (per credit hour)	16.00
DHHE 640	Student Teaching II (per credit hour)	16.00
Education		
ED 404	Clinical Experience Seminar I	300.00
ED 409/409D	Practicum (per credit hour)	16.00
ED 411	Clinical Experience I (per credit hour)	16.00
ED 412	Clinical Experience II (per credit hour)	16.00
ED 422	Early Childhood Studies Clinical Experience I	16.00
ED 423	Early Childhood Studies Clinical Experience II	16.00
ED 424	Early Childhood Studies Clinical Experience III	16.00
ED 498	Clinical Experience III (per credit hour)	16.00

SPECIAL COURSE FEES

<i>Course #</i>	<i>Subject Title</i>	<i>Fee</i>
ED 609	Practicum	16.00
ED 614	Practicum	25.00
ED 616	M.A.T. Clinical Experience II (per credit hour)	25.00
ED 657	Professional Seminar I	300.00
ED 697	M.A.T. Clinical Experience III (per credit hour)	25.00

SPECIAL COURSE FEES

Course #	Subject Title	Fee
Earth Science		
ES 104L	Lab: Exploring the Physical Earth	35.00
ES 105L	Lab: Discoveries in Earth Science	35.00
ES 106L	Lab: Exploring the Oceans and Atmosphere	35.00
ES 201L	Lab: Principles of Geology	35.00
ES 202L	Lab: Principles of Geology	35.00
ES 203L	Lab: Principles of Geology	35.00
ES 301	Earth Materials	35.00
ES 302	Quantitative Methods	35.00
ES 303	Geologic Field Techniques	35.00
ES 321	Structural Geology	35.00
ES 322	Geomorphology and Aerial Photo Interpretation	35.00
ES 340	Geospatial Techniques	45.00
ES 341	Geographic Information Systems I	45.00
ES 342	Geographic Information Systems II	45.00
ES 343	Remote Sensing	45.00
ES 354	Geology of Earthquakes	35.00
ES 360	Earth Resources and the Environment	35.00
ES 408/508	Workshop (includes \$150 non-refundable deposit)	445.00
ES 450	Petrology	35.00
ES 454	Volcanology	35.00
ES 473	Environmental Geology	35.00
ES 476	Hydrology	35.00
ES 492	Advanced GIS Applications in Earth Science	45.00
ES 531	Paleobiology	35.00
ES 550	Petrology	35.00
ES 554	Volcanology	35.00
ES 573	Environmental Geology	35.00
ES 576	Hydrology	35.00
ES 592	Advanced GIS Applications in Earth Science	45.00

SPECIAL COURSE FEES

Course #	Subject Title	Fee
Exercise Science		
EXS 243	Outdoor Pursuits & Adventure Based Learning	235.00
EXS 359	Care and Prevention of Athletic Injuries	18.00
EXS 373	Physiology of Exercise	20.00
EXS 433	Physical Education in the Elementary School	5.00
EXS 485	Exercise Testing and Prescription	20.00
General Science		
GS 114L	Lab: Essentials of Physical Science	35.00
GS 116L	Lab: Essentials of Physical Science	35.00
GS 313/313W	Lab: Earth Science for Elementary Schools	35.00
GS 321L	Lab: Musical Acoustics	35.00
GS 325	Learning Science Through Scientific Practices	35.00
GS 407/507	Seminar	35.00
GS 408	Workshop	35.00
Health		
HE 252	First Aid, CPR and Safety	10.00
HE 257	Health Promotion	11.00
HE 352	First Aid and CPR Instructor	10.00
Honors		
HNR 171	Honors Theatre	90.00
HNR 325	Honors Thesis Orientation	35.00
Interpreting Studies		
INT 470/570	DeafBlind Culture, Communication & Guiding (per credit hour)	10.00

SPECIAL COURSE FEES

Course #	Subject Title	Fee
Mathematics		
MTH 211	Foundations of Elementary Mathematics I	3.00
MTH 212	Foundations of Elementary Mathematics II	3.00
MTH 213	Foundations of Elementary Mathematics III	3.00
MTH 392	College Algebra for Elementary and Middle School Teachers	3.00
MTH 393	Probability & Statistics for Elementary and Middle School Teachers	3.00
MTH 394	Introduction to Geometry for Elementary Teachers	3.00
MTH 396	Elementary Problem Solving	3.00
MTH 398	Discrete Mathematics for Elementary and Middle School Teachers	3.00
MTH 492	Abstract Algebra for Middle School Teachers	3.00
MTH 494	Geometry for Middle School Teachers	3.00
MTH 495	Calculus Concepts for Middle School Teachers	3.00
Modern Languages		
SPAN 103/203/303/ 319D	STAMP Reading, Writing, Speaking Test for Spanish	20.00
Music Education		
MUE 320	Introduction to Orff-Schulwerk	50.00
MUE 451/551	Woodwind Pedagogy	40.00
MUE 452/552	Brass Techniques	40.00
MUE 453/553	Percussion Techniques	40.00
MUE 454/554	String Techniques	40.00
<i>Creative Arts Differential Fee of 17.00/credit for all A, ARE, D, MUE, MUEN, MUS, and TA (excludes MUP) courses.</i>		

SPECIAL COURSE FEES

Course #	Subject Title	Fee
Music Performance		
MUEN 101/301/501	Concert Choir	20.00
MUEN 102/302/502	Chamber Singers	20.00
MUEN 103/303	University Band	20.00
MUEN 111/311/511	Western Oregon Symphony	20.00
MUEN 112/312/512	Wind Ensemble	20.00
MUEN 113/313/513	Early Music Ensemble	20.00
MUEN 120/320/520	Chamber Ensemble	20.00
MUEN 121/321/521	Brass Chamber Ensemble	20.00
MUEN 122/322/522	String Chamber Ensemble	20.00
MUEN 123/323/523	Woodwind Chamber Ensemble	20.00
MUEN 124/324/524	Piano Chamber Ensemble	20.00
MUEN 141/341/541	Percussion Ensemble	20.00
MUEN 142/342/542	New Music Ensemble	20.00
MUEN 143/343/543	Guitar Ensemble	20.00
MUEN 151/351/551	Opera Scenes: Vocal	20.00
MUEN 152/352/552	Opera Scenes: Instrumental	20.00
MUEN 153/353/553	Musical Theatre: Vocal	20.00
MUEN 154/354/554	Musical Theatre: Instrumental	20.00
MUEN 161/361/561	Western Oregon Voices	20.00
MUEN 162/362/562	Jazz Orchestra	20.00
MUEN 163/363/563	Latin Jazz	20.00
MUEN 170/370/570	Combo	20.00
MUEN 171/371/571	Jazz Repertoire Combo	20.00
MUEN 172/372/572	Hemisphere Combo	20.00
MUEN 173/373/573	Singer Songwriter Combo	20.00
MUEN 190/390/590	Ensemble	20.00
MUEN 201	WOU Drum Line	20.00
MUEN 202	WOU Pep Band	20.00

Creative Arts Differential Fee of 17.00/credit for all A, ARE, D, MUE, MUEN, MUS, and TA (excludes MUP) courses.

SPECIAL COURSE FEES

Course #	Subject Title	Fee
Music		
MUS 120	Music Theory Fundamentals	50.00
MUS 150	Digital Audio Workstation	50.00
MUS 160	Digital Music Notation	75.00
MUS 211	Music Theory I: Tonality	50.00
MUS 212	Music Theory II: Counterpoint	50.00
MUS 213	Music Theory III: Form & Analysis	50.00
MUS 231	Piano Proficiency I	25.00
MUS 232	Piano Proficiency II	25.00
MUS 233	Piano Proficiency III	25.00
MUS 234	Piano Proficiency IV	25.00
MUS 235	Piano Proficiency V	25.00
MUS 236	Piano Proficiency VI	25.00
MUS 250	Concert Attendance	10.00
MUS 311	Music Theory IV: Chromatic Harmony	50.00
MUS 312	Music Theory V: Post Tonal Systems	50.00
MUS 313	Music Theory VI: Analysis of 20th and 21st Century Literature	50.00
MUS 371	Orchestration I	25.00
MUS 372	Orchestration II	25.00
MUS 373	Orchestration III	25.00
MUS 414	Jazz Theory	50.00
MUS 415	Jazz Arranging I	50.00
MUS 416	Jazz Arranging II	50.00
MUS 423	Media Music Production III	75.00
	Practice Room Only (only one fee per term)	60.00
	2 credits of MUP (does not apply to MUP Audio Production 110/210/310/410/610 Off-Campus)	70.00
	3 credits of MUP (does not apply to MUP Audio Production 110/210/310/410/610 Off-Campus)	105.00
	4 credits of MUP (does not apply to MUP Audio Production 110/210/310/410/610 Off-Campus)	140.00
	2 credits of MUP Recording Audio Production 110/210/310/410/610 Off-Campus	225.00
	3 credits of MUP Recording Audio Production 110/210/310/410/610 Off-Campus	310.00
	4 credits of MUP Recording Audio Production 110/210/310/410/610 Off-Campus	400.00

Creative Arts Differential Fee of 17.00/credit for all A, ARE, D, MUE, MUEN, MUS, and TA (excludes MUP) courses.

SPECIAL COURSE FEES

Course #	Subject Title	Fee
Natural Science		
<i>Breakage/Loss will be assessed at replacement cost</i>		
Physical Education		
PE 131	Individual Health and Fitness	10.00
PE 131L	Lab: Individual Health and Fitness	10.00
PE 133	Bowling	40.00
PE 134	Golf	35.00
PE 162	Fitness Swim	41.00
PE 173	Alpine Skiing and Snowboarding	205.00
PE 175	Nordic Skiing and Snowshoeing	90.00
PE 182	Backpacking	40.00
PE 183	Advanced Backpacking	40.00
PE 199	Outdoor & Adventure Activities	200.00
PE 199	Beginning Scuba Diving	400.00
Physics		
PH 201L	Lab: General Physics	35.00
PH 202L	Lab: General Physics	35.00
PH 203L	Lab: General Physics	35.00
PH 211L	Lab: General Physics	35.00
PH 212L	Lab: General Physics	35.00
PH 213L	Lab: General Physics	35.00
Psychology		
PSY 451/551	Behavioral Neuroscience	20.00
Rehabilitation Counseling		
RC 610	Internship (per credit hour)	6.00
RC 662	Assessment and Testing	15.00
Special Education		
SPED 648	Clinical Experience II	300.00
SPED 649	Clinical Experience III (per credit hour)	16.00
SPED 687	Academic Field Experience (per credit hour)	16.00
SPED 688	Low Incidence Field Experience (per credit hour)	16.00
SPED 689	Clinical Experience IV (per credit hour)	16.00

SPECIAL COURSE FEES

Course #	Subject Title	Fee
Social Science		
SUST 321/321C/ 321D/321W	Field Geography	35.00
SUST 393	Soils and Sustainability	20.00
Theater Arts		
TA 242	Design Aesthetics	20.00
TA 244	Technical Theatre: Scenecraft	50.00
TA 246	Technical Theatre: Costuming	20.00
TA 252	Technical Theatre: Makeup	65.00
TA 308	History of Fashion	20.00
TA 315	Music Theatre Studio I	70.00
TA 328	Stage Combat Studio	60.00
TA 336	Stage Properties	120.00
TA 344	Costume Crafts	100.00
TA 345	Scenic Painting I	75.00
TA 346	Scenic Design	45.00
TA 434/534	Advance Scenecraft	15.00
TA 436/536	Advanced Costume Techniques	25.00
TA 445	Scenic Painting II	75.00
<i>Creative Arts Differential Fee of 17.00/credit for all A, ARE, D, MUE, MUEN, MUS, and TA (excludes MUP) courses.</i>		

Online Courses

Online courses are subject to an online course fee of 53.00 per credit.

GENERAL SERVICES & SPECIAL FEES

	<i>Fee</i>
Admission Fees	
Undergraduate Non-Admit Student Fee (valid for four terms)	30.00
High School Dual Enrollment (per academic year)	30.00
American Sign Language Proficiency	
ASL Proficiency Examination	80.00 - 100.00
Business Office Fees	
Emergency Loan	5.00 per 100.00
Service charge per loan	
Returned Check	25.00
If check was used to pay tuition and fees, institution may assess the late registration fee as well.	
Short Term Tuition Deferment	12.00
Service charge per term	
Web Bank Card Service Fee	2% of transaction
Stop Payment on Check	20.00
Service charge per check	
Graduate Office Fees	
Graduate Non-Admit Student Fee (valid for two terms)	30.00
Graduate Thesis Binding (per book)	30.00
Mailing Fees (per book)	5.00
International Students and Scholars Affairs' Office	
Express Mail Fee (International)	80.00
Shuttle Fee	
From Portland Airport	100.00
From Salem HUT station	35.00
National Student Exchange	
Participant Application Fee (per application)	200.00
SE Program Fee (one-time)	75.00
Natural Science & Mathematics Division	
Chemistry Breakage Fee	10.00
Math Placement Test Fee	15.00
ALEKS, math placement suite (good for 1 year, additional year cost per student)	15.00

GENERAL SERVICES & SPECIAL FEES

	<i>Fee</i>
<i>OHSU Nursing Program</i>	
Student Technology Fee assessed on OHSU nursing courses held on WOU campus (per credit)	14.00
<i>Registrar Services</i>	
Add/Drop per course added or dropped	20.00
Late Registration/Fee Payment	
Beginning close of 5th calendar day after classes begin	100.00
Official Transcript - electronic (each)	10.00
Official Transcript - paper (each)	12.50
Same-Day Rush Transcript	30.00
Credit by Examination Fee (per credit hour)	30.00
Directory information to outside agencies (per page)	0.25
This amount is added to the hourly rate of staff responding to request multiplied by the amount of time required to respond	
Enrollment verification surcharge (per request)	3.00
Readmission Fee (undergraduate and graduate)	15.00
Duplicate/Replacement Diploma Fee	40.00
Express Delivery - Actual shipper's cost when available, otherwise:	
Express Mail Fee (Domestic)	16.00-60.00
Express Mail Fee (International)	30.00-70.00
Rush Diploma Printing	75.00
<i>Sculpture Stone Fee</i>	
Re-sale of quarried sculpture stone at 5% above cost which includes shipping. The sales price will vary depending on the type of stone.	Varies

Finance & Administration Committee (FAC), April 7, 2023, Occupational Therapy Doctorate Tuition for 2024-25

The Occupational Therapy Doctorate (OTD) was approved at the June 8, 2022 Board meeting. The inaugural class is anticipated to begin Fall 2024. As part of the accreditation process as well as being able to recruit students, our initial tuition rate for the program needs to be posted online in advance of the regular tuition setting timeline.

In line with WOU's mission of affordability, the proposed tuition rate will be the lowest for Occupational Therapy in Oregon and should place us in a competitive position while also sustaining the university. The attached pro forma continues to be refined, but shows the upfront investment in the program (administrative staff, faculty, equipment, general S&S, etc.) and anticipated revenues based on annual tuition of \$34,900. It assumes an initial cohort size of 30 students that grows to 40 students in five years, with relatively high retention, as typical for OT programs. The program is predicted to become cash flow positive on an annual basis in FY26, and return on the investment beginning FY28. Note, the proforma does not capture the expense of remodeling the WOU:Salem building to house the program as Capital Improvement & Renewal funds will be used to fund the project.

STAFF RECOMMENDATION:

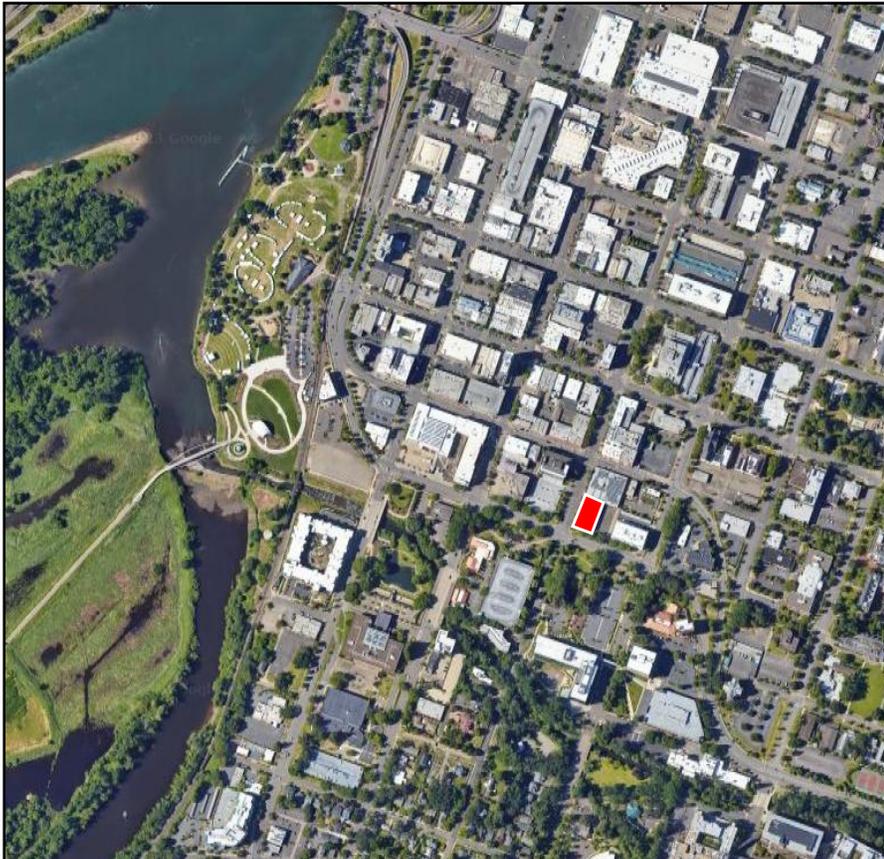
It is recommended that the Western Oregon University Finance and Administration Committee recommends to the Board of Trustees to approve the Occupational Therapy Doctorate annual tuition rate of \$34,900 for the 2024-25 academic year (including summer).

Occupational Therapy Pro Forma

Academic Year	22-23	23-24	24-25	25-26	26-27	27-28	28-29	29-30
Total Students	0	0	30	60	92	100	108	112
Expenses								
Personnel	103,000	872,893	1,558,540	1,783,053	1,858,187	1,961,157	2,012,078	2,123,758
Accreditation & memberships	4,500	9,595	5,000	10,920	27,090	11,310	11,470	11,630
Lab equipment & supplies	-	317,700	165,885	139,363	118,086	125,449	133,253	140,452
General S&S	8,500	17,000	17,850	18,743	19,680	20,664	21,697	22,782
Reference & faculty development	-	75,000	78,750	82,688	86,822	91,163	95,721	100,507
Program development	-	15,000	15,750	16,538	17,364	18,233	19,144	20,101
Placement costs	-	3,000	5,150	5,408	5,678	5,962	6,260	6,573
Total Expenses	116,000	1,310,188	1,846,925	2,056,711	2,132,907	2,233,937	2,299,623	2,425,804
Total Tuition Revenue	-	-	1,047,000	2,156,820	3,406,338	3,813,617	4,242,268	4,531,371
Net Revenue	\$ (116,000)	\$ (1,310,188)	\$ (799,925)	\$ 100,109	\$ 1,273,431	\$ 1,579,681	\$ 1,942,644	\$ 2,105,567
Cumulative Net Revenue	(116,000)	(1,426,188)	(2,226,113)	(2,126,004)	(852,573)	727,107	2,669,752	4,775,319

WOU Salem Occupational Therapy Doctorate

Seismic Upgrade and Remodel



Project Executive Summary Statement

The Occupational Therapy Doctorate program has many requirements that set it apart from other programs on campus, such as mock living quarters, sensory lab with overhead suspension equipment, therapeutic treatment labs, and a Virtual Cadaver lab.

We investigated housing this program at many different locations on the Monmouth Campus but determined the Salem WOU building was the best location from a cost and program needs perspective. In addition to the specialty building needs, the location provides excellent access to Salem Health, the Oregon State Hospital, and the State Capital, all of which will be important partners for the OTD program.

The historic Vick building in downtown Salem at 525 Trade St was purchased by Western Oregon University in 2019 for 2.735 million. The building was built in the 1920s to house an automobile and tractor dealership. Throughout the years it has seen many different tenants and different uses, but the initial design and building footprint has stayed the same. Upon purchase, WOU facilities started the process of conducting a remodel of the 100-year-old building. Most remodels have consisted of moving walls, adding HVAC services and an elevator. Knowing this and the structural design, we can say that we have a building with strong interior structure.

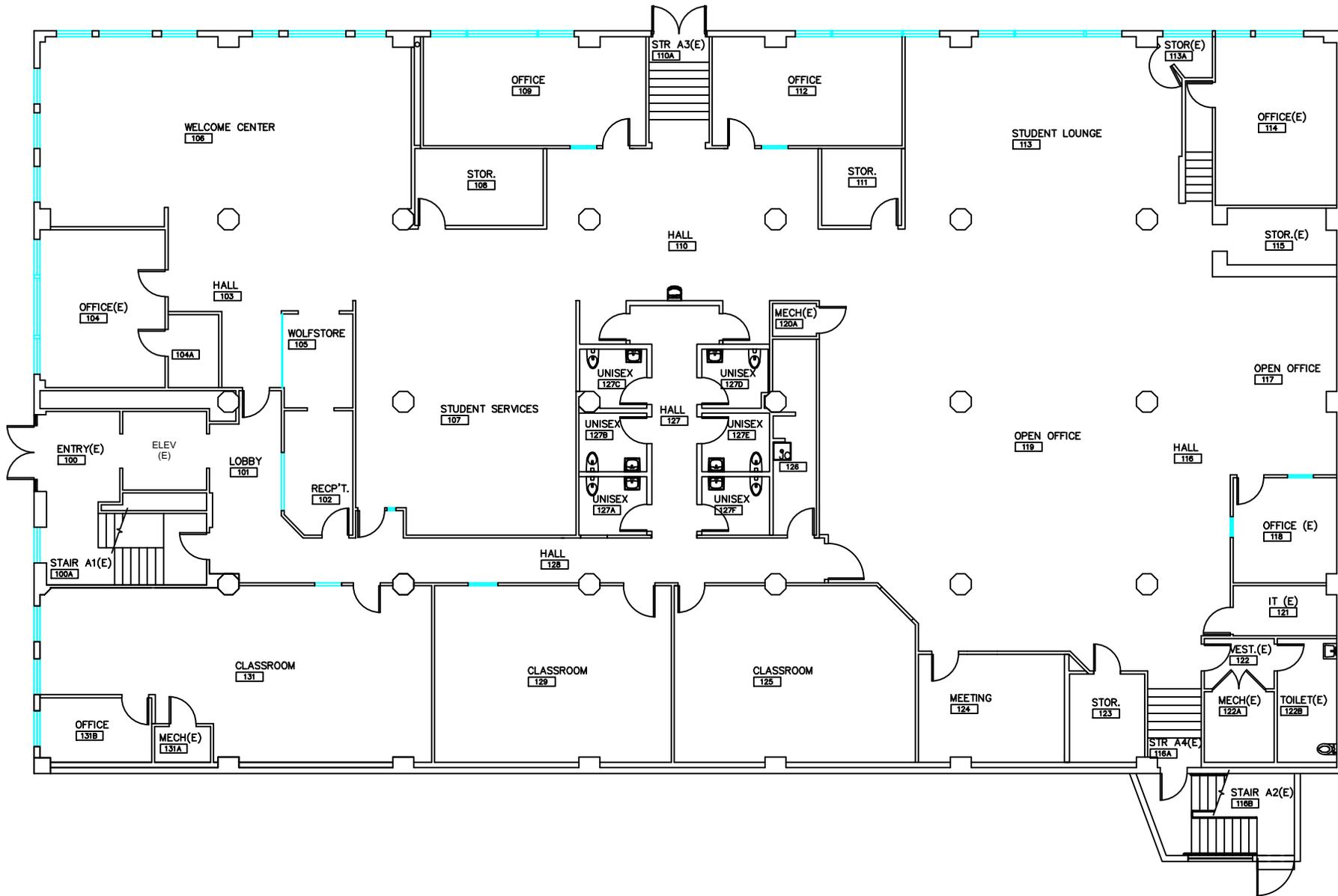
WOU's remodel was conducted on a tight budget in 2020 and 2021. In this time frame construction materials sky rocketed in price and this resulted in the project sustaining multiple Value Engineering phases and scope reductions. The building was originally remodeled to stay just below the requirements for mandatory upgrade to the fire suppression system and seismic retrofitting. This resulted in a building that has a total occupancy area of 24,000 square feet, with 10,668 square feet of open space, 6 class rooms, 1 computer lab and 5 offices. The large amount of open space and small amount of offices is a direct result of staying below the thresholds to require fire suppression upgrade and seismic retrofit. This also resulted in 12,000 square feet of daylight basement space that can only be used for storage.

The Occupational Therapy Doctorate program requires many of the amenities already in the Salem WOU building such as class rooms and large open areas, but will require a minimum of 10 offices to be added and will require the additional space in the basement to house the cadaver lab. The added offices will push the renovation square footage over the threshold of fire suppression and seismic retrofitting.

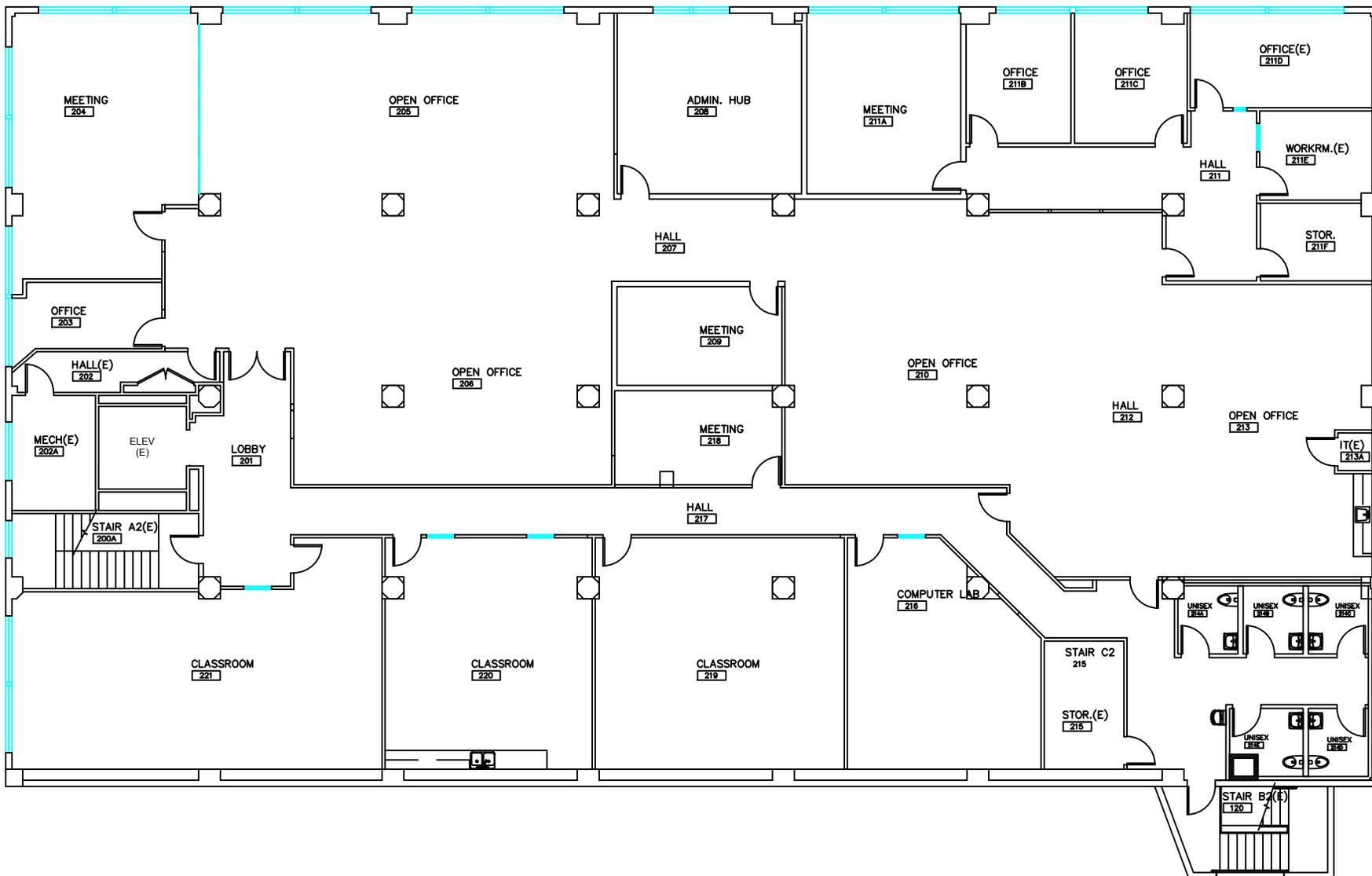
Western Oregon University's goal is that all its buildings go above ADA standards, meet current seismic standards and are fire sprinklered. This helps ensure student safety, increases building value and lowers insurance costs.

WOU Capital Planning and Construction, along with the Occupational Therapy Doctorate program, developed a remodel proforma in the amount of \$2,846,355 the WOU Salem building to add offices and laboratory spaces to accommodate OTD program, seismically retrofit the building and add fire sprinkler system. The funding source for this will be Capital Improvements and Renewal (CIR) funds.

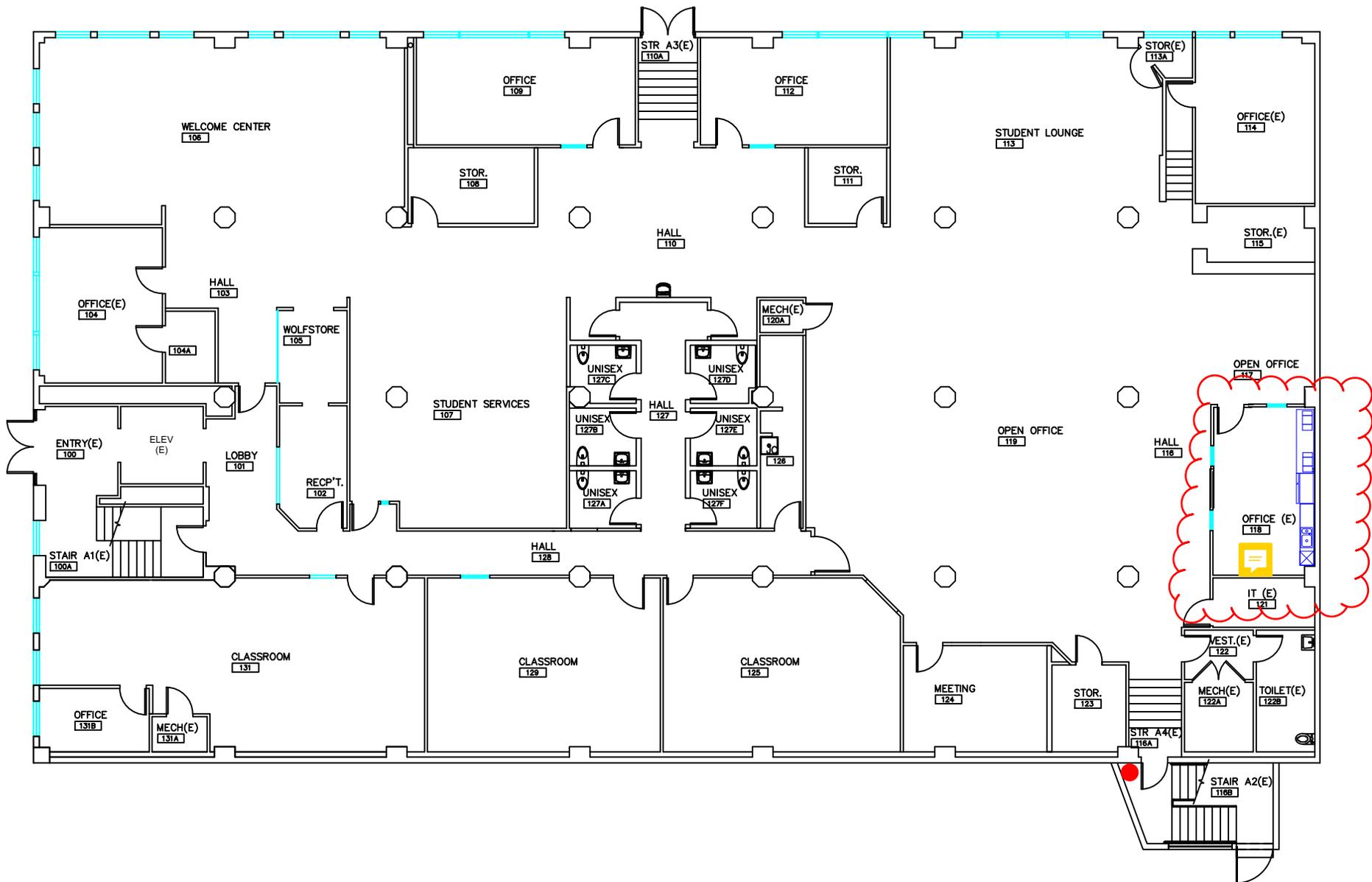
EXISTING 1st Floor



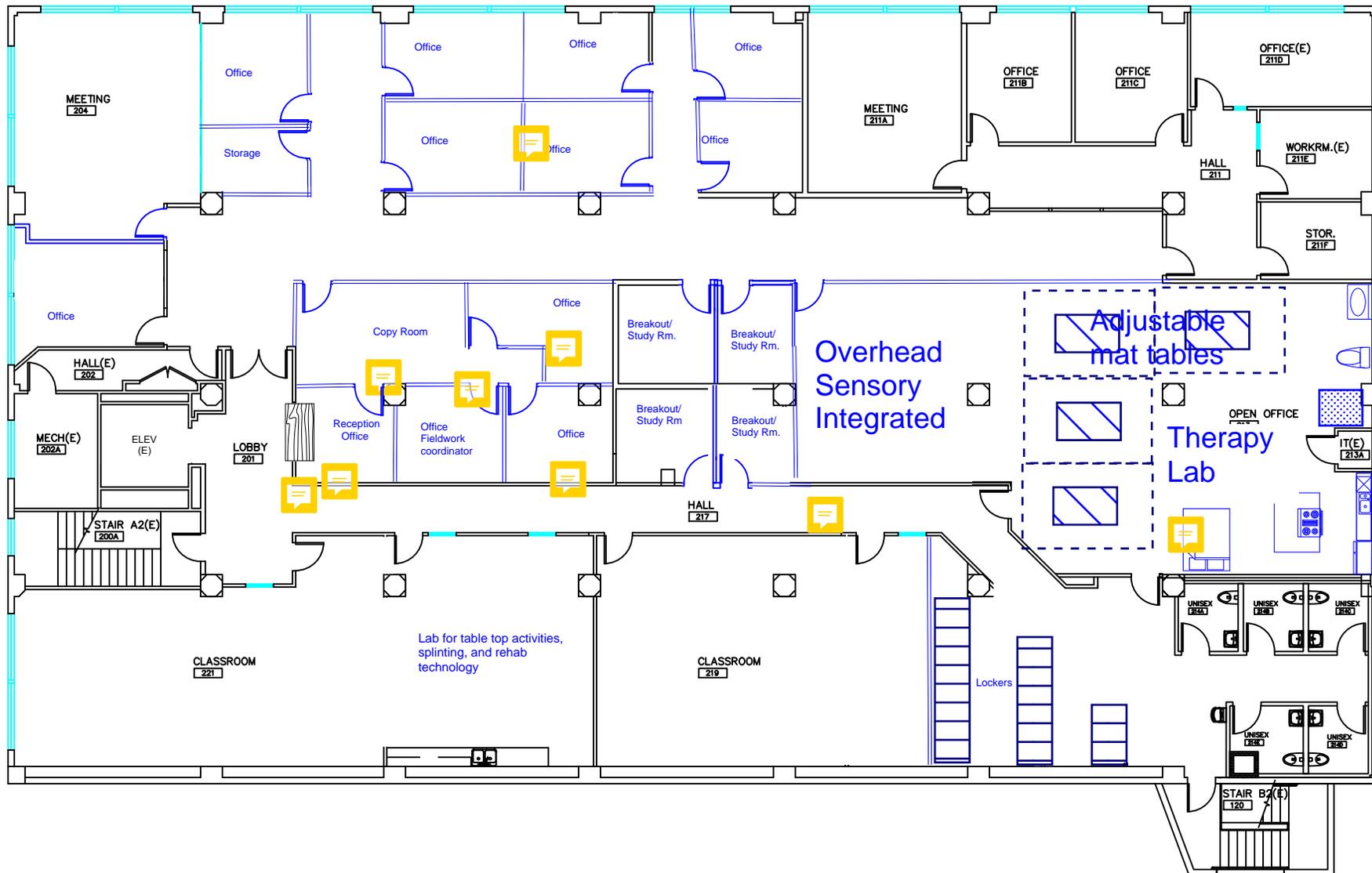
EXISTING 2nd Floor



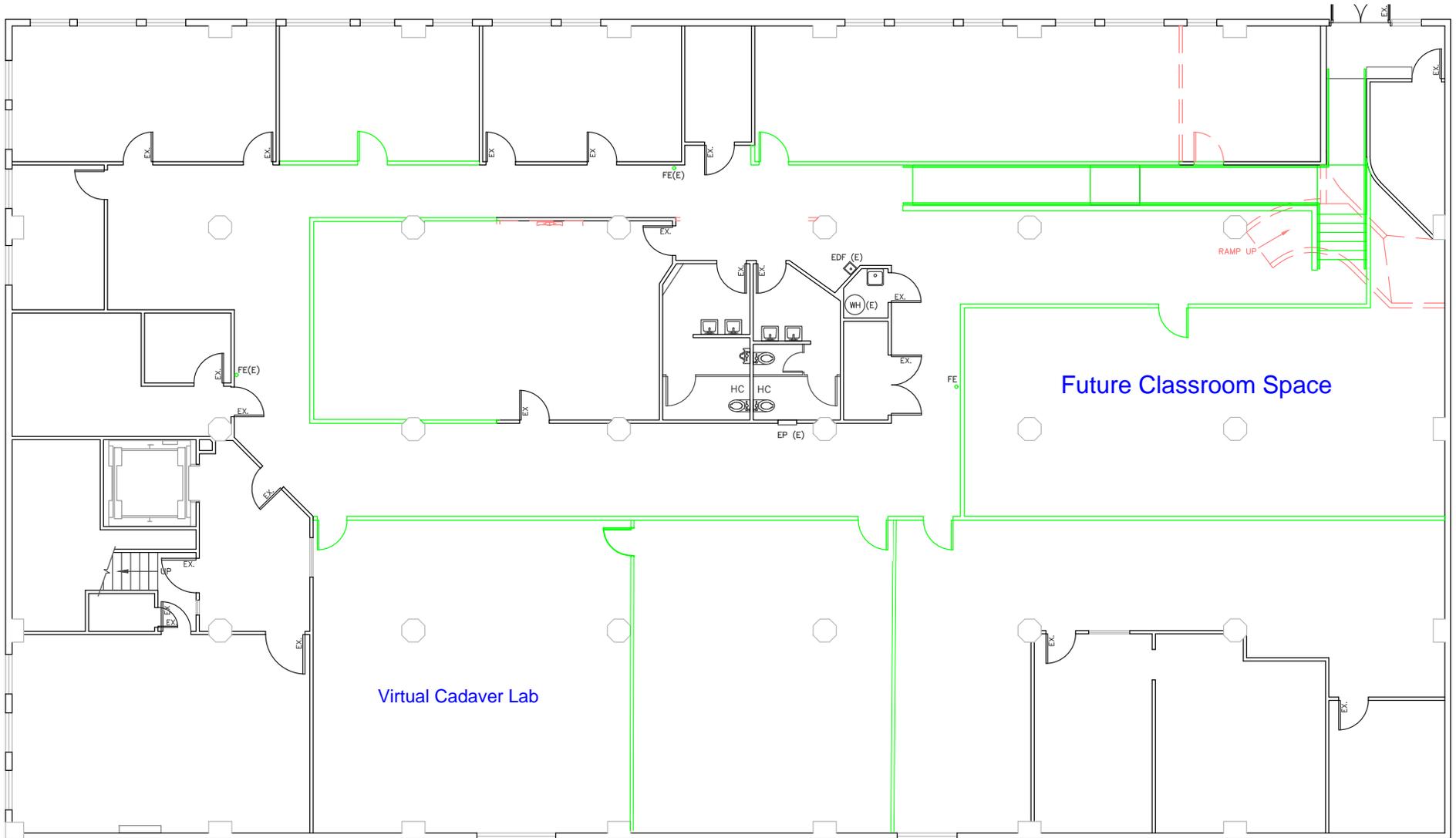
Revised 1st Floor



Revised 2nd Floor



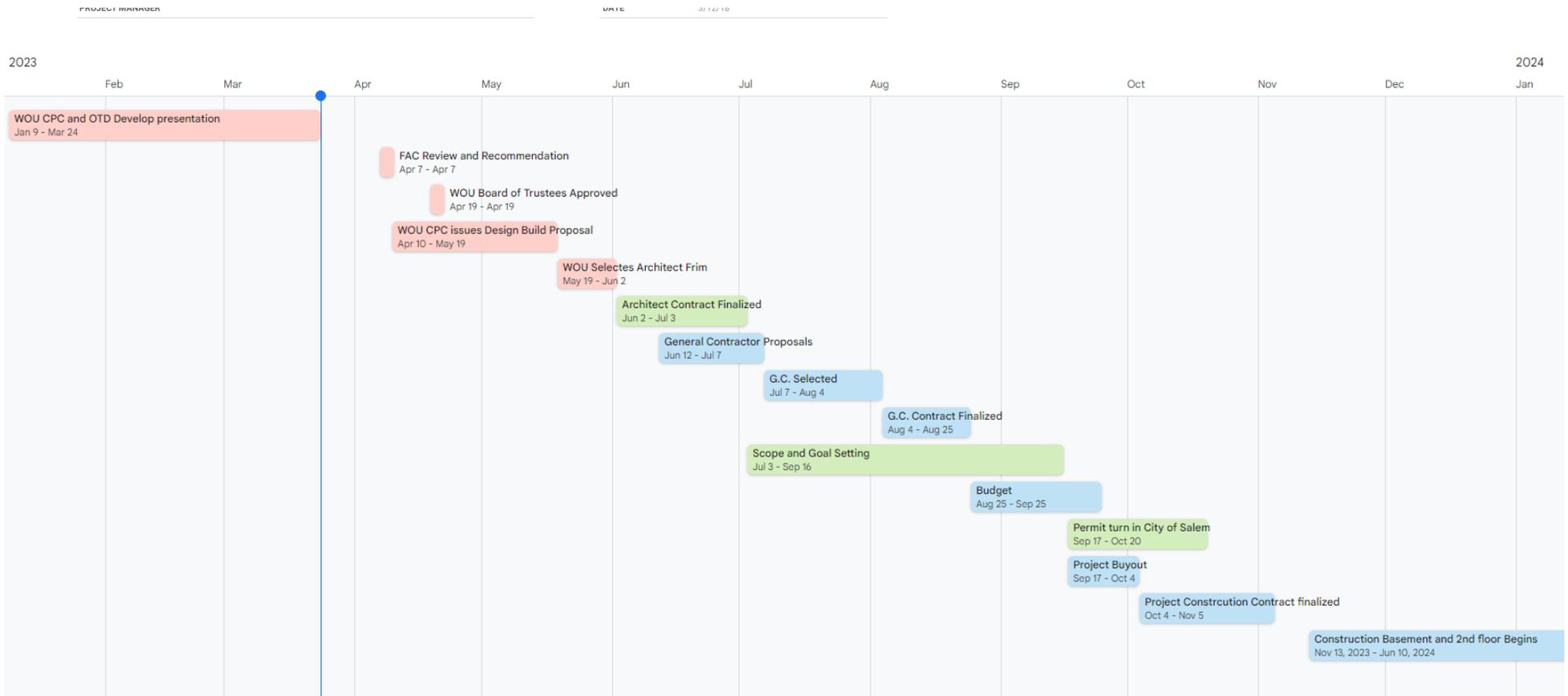
Revised Basement



Schedule

WBS NUMBER	TASK TITLE	TASK OWNER	START DATE	DUE DATE	DURATION	PCT OF TASK COMPLETE
1	Project Conception and Onboarding					
0.1	WOU CPC and OTD Develop presentation	WOU	1/9/23	3/24/23	75	100%
1.1	FAC Review and Recommendation	WOU	4/7/23	4/7/23	1	0%
1.1.1	WOU Board of Trustees Approved	WOU	4/19/23	4/19/23	1	0%
1.1.2	WOU CPC issues Design Build Proposal	CPC	4/10/23	5/19/23	39	0%
1.2	WOU Selectes Architect Firm	WOU	5/19/23	6/2/23	13	0%
1.3	Architect Contract Finalized	Legal	6/2/23	7/3/23	31	0%
1.4	General Contractor Proposals	CPC	6/12/23	7/7/23	25	0%
1.5	G.C. Selected	WOU	7/7/23	8/4/23	27	0%
1.6	G.C. Contract Finalized	Legal	8/4/23	8/25/23	21	0%
2	Project Design and Planning					
2.1	Scope and Goal Setting	WOU/Architect	7/3/23	9/16/23	73	0%
2.2	Budget	G.C.	8/25/23	9/25/23	30	0%
2.3	Permit turn in City of Salem	Architect	9/17/23	10/20/23	33	0%
2.4	Project Buyout	G.C.	9/17/23	10/4/23	17	0%
2.5	Project Construction Contract finalized	WOU CPC	10/4/23	11/5/23	31	0%
3	Project Construction					
3.1	Construction Basement and 2nd floor Begins	G.C.	11/13/23	6/10/24	207	0%
3.2	WOU OT programs moves in	WOU	6/14/24	9/20/24	96	0%
3.2.1	Construction on 1st floor Starts	G.C.	6/10/24	9/6/24	86	0%
3.2.2	WOU staff move into first floor	WOU	9/6/24	9/30/24	24	0%
3.3	Project receives final Occupancy from City of Salem	G.C.	9/20/24	9/30/24	10	0%
3.3.1	Project O & M's and Closeout	WOU	9/6/24	10/15/24	39	0%

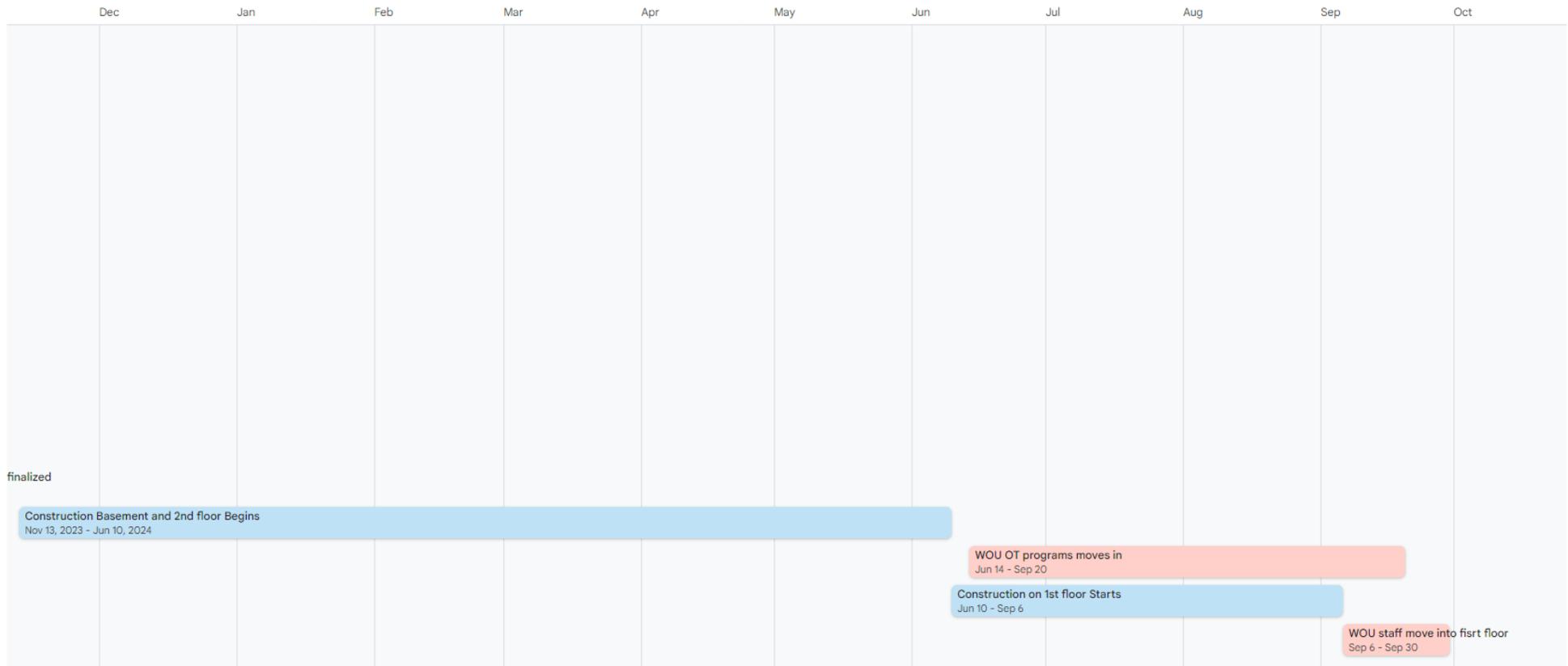
Schedule



Schedule Challenges:

- Keep 1st floor open for classes during Winter and Spring Term 2024
- ODP move in summer 2024, must have Temporary Certificate of Occupancy
- City of Salem Permit approval process and on-boarding contractors
- Material procurement for Fiber wrapped Columns

Schedule



Schedule Challenges:

- Keep 1st floor open for classes during Winter and Spring Term 2024
- ODP move in summer 2024, must have Temporary Certificate of Occupancy
- City of Salem Permit approval process and on-boarding contractors
- Material procurement for Fiber wrapped Columns

Budget

WOU Salem OTD Program Construction Budget

Seismic Retrofitting

Fiber Reinforced Polymer						
	Columns		Pillars		Cost per	
Basement	18	Qty	17	Qty	\$10,475.00	\$366,625.00
1st Floor	18	Qty	19	Qty	\$11,750.00	\$434,750.00
2nd Floor	18	Qty	19	Qty	\$11,520.00	\$426,240.00
					Total	\$1,227,615.00

Fire Supression System

Fire Sprinkler system						
	Ceiling		Fire Sprinkler		Cost per	
Basment	12693	Sq. Ft.	14113	Sq. Ft.	\$9.24	\$247,687.44
1st Floor	12282	Sq. Ft.	13702	Sq. Ft.	\$9.00	\$233,856.00
2nd Floor	10853	Sq. Ft.	12273	Sq. Ft.	\$8.78	\$203,046.28
					Total	\$684,589.72

Added OTD Program Area

Remodel for OTD						
	Remodel		Cost per			
Basment	5077.2	Sq. Ft.			\$45.22	\$229,590.98
1st Floor	157	Sq. Ft.			\$54.00	\$8,478.00
2nd Floor	6754	Sq. Ft.			\$64.75	\$437,321.50
					Total	\$675,390.48

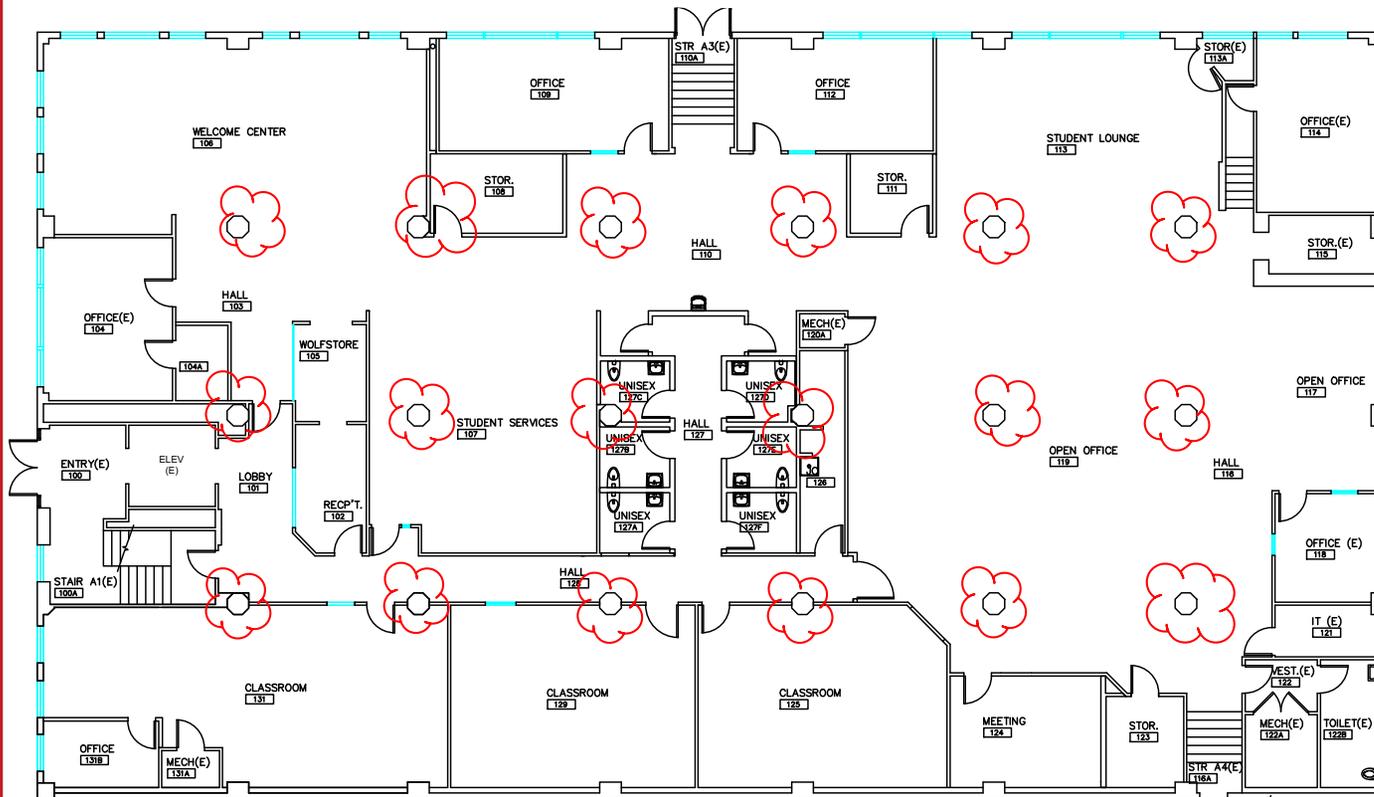
					Design and Construction	\$2,587,595.20
					Construction Contingency	10%
					Total requested	\$2,846,354.72



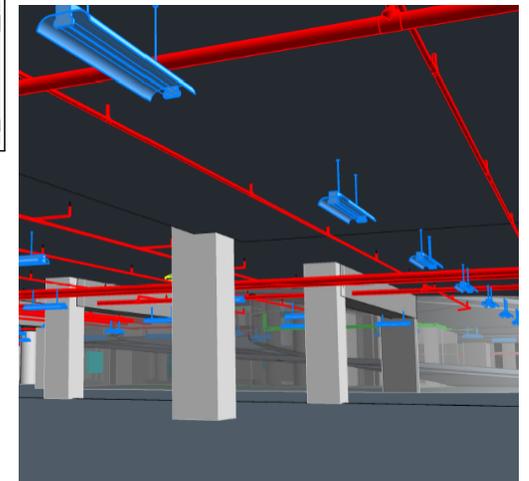
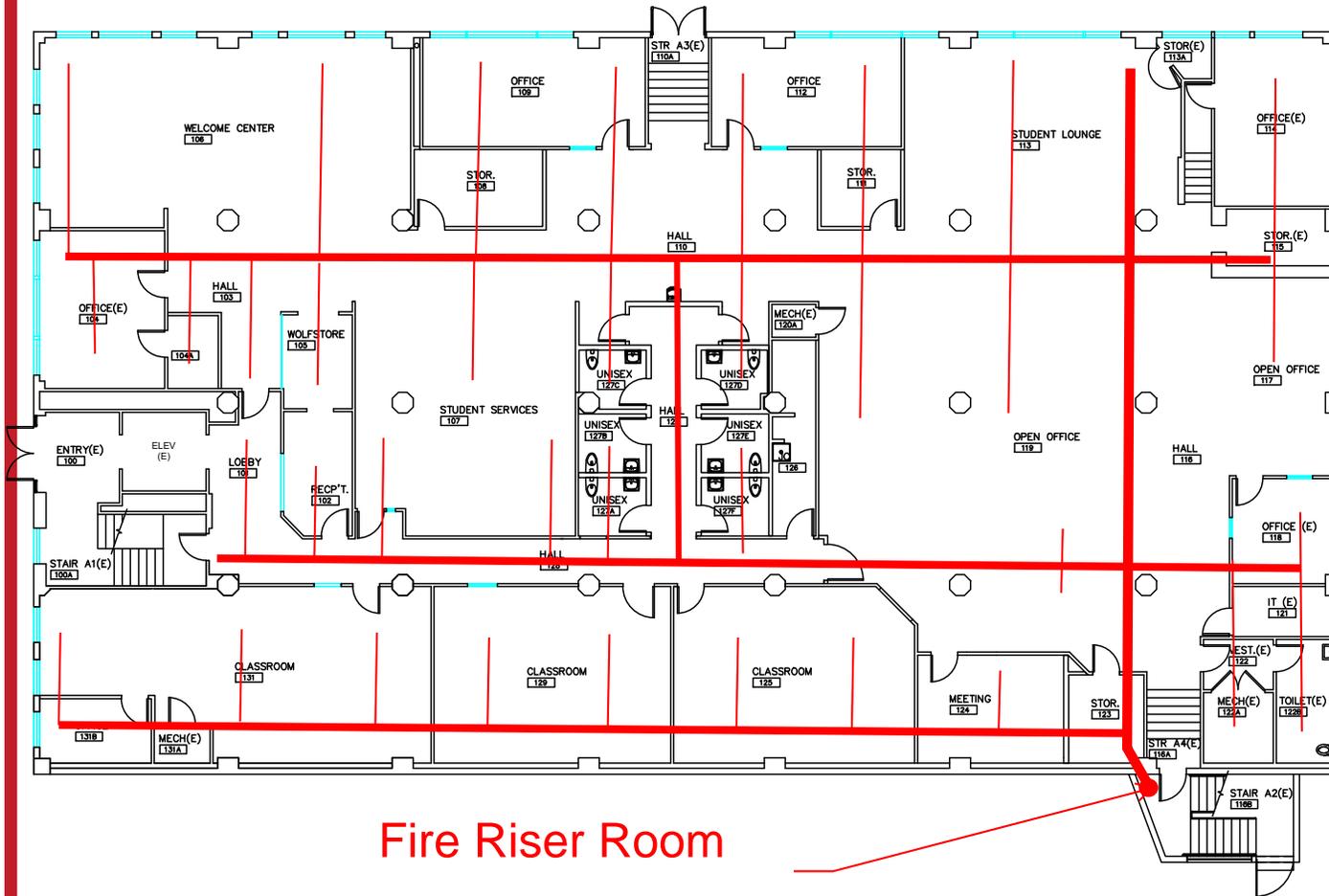
Budget Challenges:

- Requirement for added office space
- Material and Labor pricing changes
- City of Salem requirements (sidewalks, parking, site)

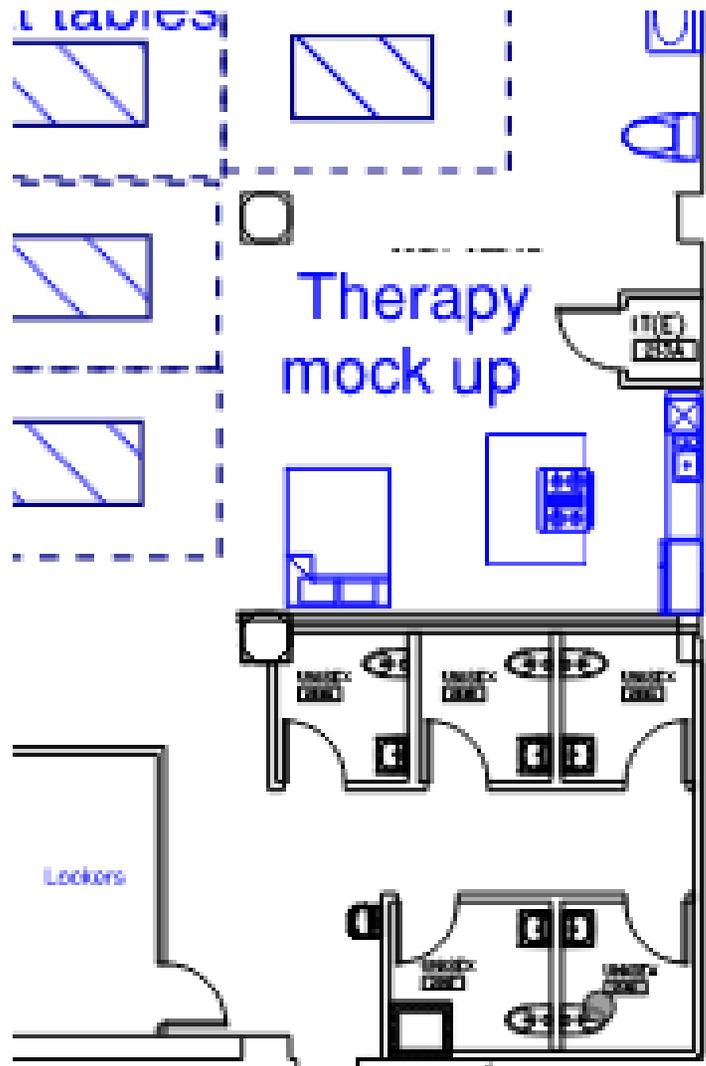
Seismic Retrofitting with Fiber Reinforced Polymers



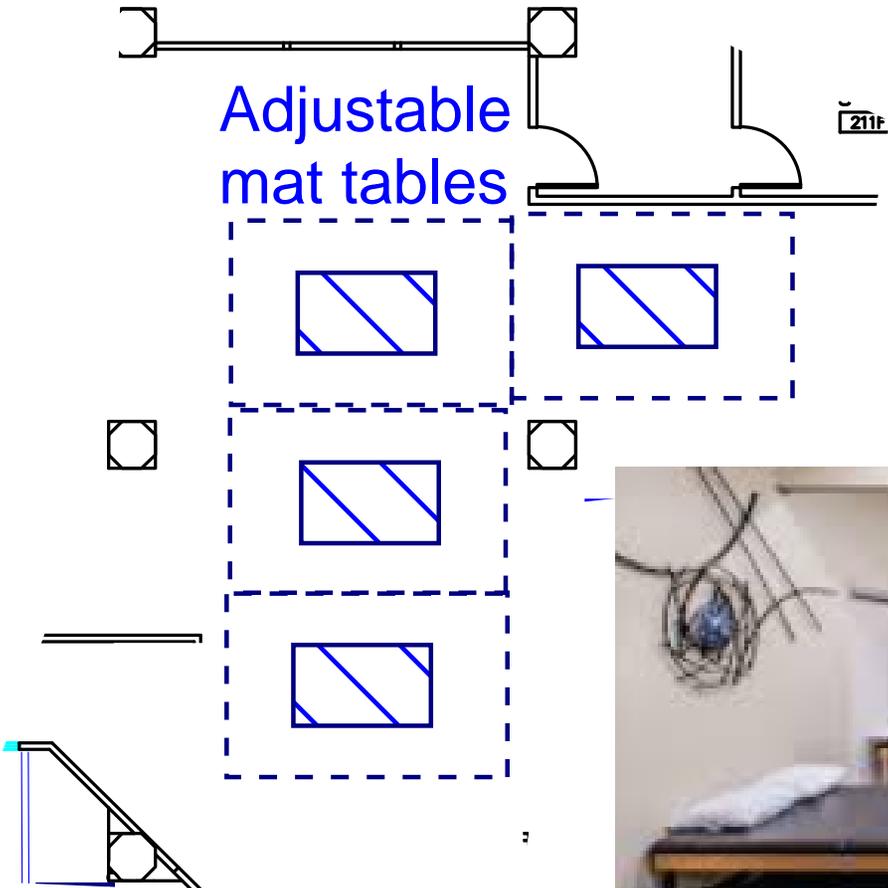
Fire Sprinkler System



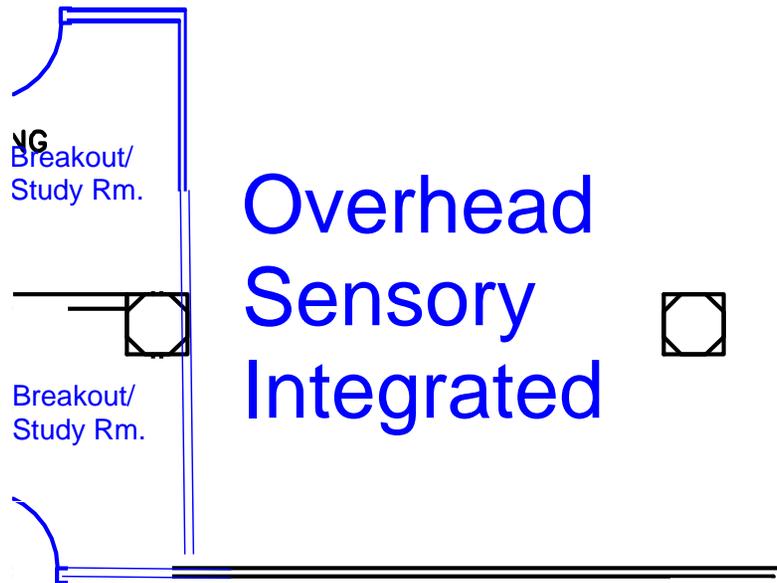
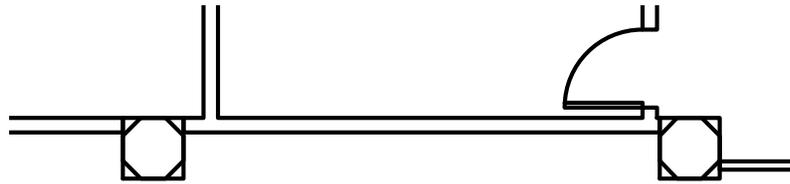
ADL Apartment



Therapy Room



OT Sensory Room



Staff Recommendation



Staff recommends to the FAC to recommend to the Board of Trustees to approve the capital budget in the amount of \$2,846,355 for the remodel of the WOU Salem building.

Finance & Administration Committee (FAC), Revision of the Committee Charter

Prior to assuming full governance authority of the University on July 1, 2015, the WOU Board of Trustees approved charters for its (then) three standing committees. Each charter included a recommendation for annual review and assessment.

To fulfill the recommendation for annual review, the Finance & Administration Committee (FAC) has provided a careful review of its charter to ensure it aligns with the current practices of the committee and the university.

At its April 7 meeting, members of the committee and the staff designees will engage in conversation to review the edits recommended in the document below. After further review, the Committee may suggest additional edits and approve the document as developed at that time.

STAFF RECOMMENDATION

It is recommended that the WOU Board of Finance & Administration Committee accept the changes in its Committee Charter after final edits are completed.



Western Oregon University Board of Trustees

Finance & Administration Committee (FAC)

Mission

The Finance and Administration Committee (FAC) of the WOU Board of Trustees is charged with ensuring effective operations and sound stewardship of the university's financial, human, technology, and physical assets in support of the university's mission. The FAC is responsible for making decisions delegated to it and making recommendations to the Board, consistent with Board Statements and University policy.

Commented [A1]: remove HR oversight - resides w EGTC

Authority and Responsibilities

General Responsibilities

Under the guidance of the full board, develop and recommend policies necessary to ensure university resources are managed prudently, efficiently, and effectively.

Develop and recommend, for Board adoption, the policy for operational and transactional authority to be delegated to the President and Vice President for Finance and Administration including reporting requirements and evaluation mechanisms.

Commented [A2]: clarify and call out if this is referring to pertinent sections of the Board Statement on Delegation of Authority

Commented [A3]: Section 1.6

Develop and monitor a set of financial performance and accountability measures for the university, including reporting requirements and evaluation mechanisms.

Develop and monitor a set of personnel standards regarding the education, experience, and certifications, if any, needed for all senior finance and administrative personnel in the university to efficiently and effectively discharge their duties and responsibilities.

Commented [A4]: remove - this is the work of the division leader, not a board committee

Commented [A5]: Staff agrees

Ensure a rigorous control environment and internal control structure that protects and safeguards institutional assets against losses.

The Chair of the Committee shall have the prerogative to defer Committee actions, where, in his/her opinion, the matter at hand is better suited for full Board consideration.

Commented [A6]: change to gender neutral 'their'

The Chair of the Committee shall provide a standing report at each Board meeting as to the Committee's activities in the interim.

Operating budget and general finance issues



Advise the Board on the management of the ongoing financial and administrative affairs of the university

Evaluate, monitor, and advise the Board on financial risk posed by, but not limited to, capital projects, debt, and budget allocations.

Commented [A7]: Change to 'enterprise risk' since the division is responsible for cyber security and physical security - not just financial.

Commented [A8]: Staff agrees

Conduct the annual tuition and fee approval process that: 1) ensures resident student access and affordability are maximized to an extent feasible by meeting the Board's affordability goals; 2) includes significant student involvement and input in both the formulation and approval processes each year; and 3) combines the approval processes for both the academic year and summer session into one action in June each year.

Commented [A9]: change to "oversee" or "ensure"

Commented [A10]: Staff recommends oversee

Commented [A11]: Staff recommends to change to Spring

Review and recommend the annual operating budget to the Board and approve any changes above Board thresholds thereto each year.

Commented [A12]: and audits.

Approve quarterly budget management reports for the university.

Commented [A13]: Staff recommends changing Approve to Accept

Approve the annual management report and the annual financial statement analyses.

Commented [A14]: Ensure Financial Statement and Single Audits are completed annually.

Review and approve treasury management policies.

Commented [A15]: Staff recommends removing (management reports are quarterly and mentioned above) and changing "approve" to "Review and recommend to the Board"

Approve bond sales, including issuing determinations that a project is self-supporting and self-liquidating where applicable to the extent permitted by law, Certificate of Participation (COP) sales, and other financing agreements.

Commented [A16]: Staff recommends "and annual audits."

Commented [A17]: Staff recommends "and contracts"

Review and approve the investment policy guidelines as needed.

Commented [A18]: Staff recommends "Review and recommend to the Board"

Approve the quarterly and annual investment reports.

Commented [A19]: Staff recommends "Recommend to the Board"

Capital budget issues

Commented [A20]: Staff recommends adding "for the quasi-endowment"

Commented [A21]: Staff recommends "Review"

Review and recommend the capital construction budgets and project prioritization criteria to the Board for submission to the HECC each biennium.

Commented [A22]: add language about quasi endowment oversight and report approval

Approve changes to capital project budgets.

Commented [A23]: Staff recommends adding "of the quasi-endowment"

Approve transfers of interest in university-owned real property in accordance with Board Statements or University policies.

Commented [A24]: Staff recommends "Review and recommend to the Board capital construction budgets as outlined in Section 1.6 Delegation of Authority"

Commented [A25]: Staff recommends removing as it is absorbed above in Section 1.6 delegation

Approve all capital construction projects as required by Board Statements or University policies.

Commented [A26]: Staff recommends "Review and recommend to the Board"

Commented [A27]: Staff recommends removal as redundant.



Human resources

Develop and recommend policies addressing human resources and labor relations; including, but not limited to, diversity, grievance procedures, sexual harassment, criminal background checks, collective bargaining, classification/compensation, employee health insurance options/programs, and recruitment processes.

Commented [A28]: Example of operational function that doesn't report to VP FA...should it still reside here?

Provide oversight to personnel development plans for all senior finance and administration personnel to ensure that they are evaluated periodically and have the requisite education, experience, and certifications, if needed, to efficiently and effectively perform their duties.

Commented [A29]: remove

Commented [A30]: Staff agrees

Business operations

Focus the business functions of the university on supporting the university's mission and the Board's priorities.

Commented [A31]: This should be the responsibility the VP F&A for any required credentialing for roles (per job descriptions and or regulatory requirements) in the F&A division. This section could be changed to something like: "Receive and approve credentialing reports for key roles in the F&A division"

Provide oversight of the procurement and contracting policies, including, but not limited to monitoring minority, women-owned and emerging small business utilization, the TRU retainer contract program, certain sole source contract approvals, special procurement processes, and emergency procurements.

Commented [A32]: what is this program?

Commented [A33]: Was in place. Staff recommends removing for now.

Provide oversight of WOU risk management policies.

University computing operations

Provide oversight of information security policies; including, but not limited to System standards, disaster recovery plans, and incident response plans.

Commented [A34]: Staff recommends changing University computing operations to "Cybersecurity and Emergency Preparedness"

Commented [A35]: call out cybersecurity

Commented [A36]: Staff recommends adding.

Other functional units have been added to the VPFA - do we list them OR do we consolidate and broaden this section?

Commented [A37]: Staff recommends "Provide oversight of information security, cybersecurity, and emergency preparedness plans."

Commented [A38]: discuss as a group. what are the additional units?

Organization

Membership; Structure; Quorum

The FAC, consistent with the Board Statement on Committees, will consist of five members from the Board of Trustees. The chair of the FAC will be appointed by the Board chair. A quorum of the FAC will be three committee members, excluding the Vice President for Administration.



Meetings

The FAC will meet at least four times each year. FAC meetings will be conducted in substantial compliance with the Board Statement on the Conduct of Public Meetings. Because committees meet more frequently than the full Board of Trustees, the Chair or staff are encouraged to convene meetings by telephone or videoconference for the convenience of the committee members.

Agenda, Minutes, and Reports

The chair, in collaboration with the staff designee(s), is responsible for establishing the agendas for meetings. An agenda, together with relevant materials, will be sent to committee members at least seven (7) days in advance of the meeting. Minutes for all meetings shall be drafted by the staff designee(s), reviewed by the Secretary to the Board, reviewed by the committee chair, and approved by committee members at the following meeting.

Staff Designee

The Vice President for Finance and Administration will be staff to the FAC.

Review of Charter

This charter shall be reviewed and reassessed by the FAC at least annually, and any proposed changes shall be submitted to the board for approval.

Document History

- Discussed and revised at May 27, 2015 FAC Committee Meeting
- Approved by the Board of Trustees at October 28, 2015 Meeting

Commented [A39]: Update to April 6, 2023



Western Oregon
UNIVERSITY

Supplemental Tuition and Fee Book

Tuition Structure and Assessment

Tuition rates for students admitted to academic programs are established via student classification (undergraduate, graduate, and doctoral), residency, and credit hours taken. Tuition revenue supports all facets of the University operations including the instructional and administrative costs of WOU and varies based on factors including class sizes, faculty salaries, specialized programs and equipment, as well as facilities required to teach courses. Undergraduate nonresident students pay a larger share of instructional costs than resident students when the market allows and, on average, cover the full cost of instruction. Nonresident rates should be competitive with those charged at peer institutions and be sensitive to the institutional nonresident enrollment trends and objectives.

There are three basic tuition and fee structures at WOU: the regular academic year, summer session, and continuing education programs.

Academic Year:

Charges assessed to students during the academic year are comprised of Tuition, Mandatory Enrollment Fees, One-time Fees, and Other Student Fees. The revenue generated by each component is dedicated to a specific purpose, independent of the other components. Enrollments during the academic year are usually referred to as “in-load” enrollments.

Summer Session:

As with the academic year, tuition supports the direct instruction and administrative costs of summer session programs.

Student Residency

A resident student is one who fulfills Oregon residency requirements. Oregon residency is generally based on the following criteria: a person with a bona fide fixed and permanent physical presence established and maintained in Oregon of not less than 12 consecutive months immediately prior to the term for which residence status is requested. State funded graduate students who become Graduate Teaching or Research Assistants are automatically converted to resident status for fee purposes.

A nonresident student is one who does not meet Oregon residency requirements.

Fees

Fees fall into three distinct categories: Mandatory Enrollment Fees, One-time Fees, and Other Student Fees. Fees are established via the campus of the course the student is enrolled (Monmouth, Salem, online, etc.)

1. Mandatory Enrollment Fees

Mandatory enrollment fees include the Building, Health Service, Incidental, Recreation Center and Student Health Building Fees. Mandatory Enrollment Fees are published in the Tuition & Fee Book and approved by the Board of Trustees. Tuition & Fee Advisory Committee reviews any requests for revising an existing fee as part of their process. Students enrolled part-time are subject to these fees at a rate appropriate to the specific number of credit hours taken each term. Mandatory enrollment fees are assessed during the summer session at rates comparable to those assessed in the academic year.

Building Fee:

This fee is assessed up to \$45 per student per term and is allocated to pay debt service associated with past construction and renovation projects on the WOU campus. Any additional funds collected are put into a reserve or used for small construction projects. The building fee is a mandatory fee assessed to all students taking 1 or more credit hours on the Monmouth campus and varies depending on the number of credits a student is enrolled in.

Incidental Fee:

Incidental fee recommendations are made by the student incidental fee committee on campus. Funds generated by incidental fees are used to fund services such as Abby's House, Food Pantry, Access, ASWOU, Athletics, Campus Recreation, Childcare, Creative Arts, Student Engagement, Student Activities Board, Student Media, and WOLF Ride.

The president reviews the student committee recommendation for establishing incidental fees for the subsequent year. Once approved, WOU President submits recommendation to the WOU Board of Trustees. Generally, there are fewer incidental fee supported activities during the summer term, resulting in lower rates than those assessed during the academic year.

Health Services Fee:

This fee is used to support the Student Health & Counseling Center.

Recreation Center and Student Health Building Fees:

The Recreation Center and Student Health Building Fee is used to fund the construction and debt service of these student centers as the mandatory Building Fee assessed per term is not adequate to fund or operate projects of this scale.

2. One-time Fees

The Matriculation fee is an example of one-time fee charges to new or transfer students. These fees are one-time assessments and were developed to reduce the large number of enrollment-related fees for student orientation. The fees are also used to support academic programming for freshman interest groups and learning.

3. Other Student Fees

Fees for Instruction Related Services:

Laboratory and Course Fees must be published in the institution's catalogue and/or time schedule of classes. Laboratory and Course Fees are limited to materials and supplies to be consumed, retained, or used by the student. Items including, but not limited to, chemicals, solutions, gloves, artists' media, art supplies, glassware, expendable lab equipment, course specific software license fee, software retained by the student and other one-time use items; breakage of lab supplies; special class activities (transportation, lodging, admission costs, meals, private music lessons, equipment rental, contracted services); instructional equipment (maintenance and services); travel for supervision of practica and internships and for mentor teacher stipends in the College of Education; other materials, supplies or services necessary to provide a special supplemental educational experience of direct benefit to the student.

Academic units begin the process for requesting a new fee or revising an existing fee by preparing the course fee request form and submitting it to the Provost for review and approval. The fee requests must include information regarding the academic unit initiating the fee, subject courses, justification of need and intended use, and amount of fee.

Online courses are subject to an additional fee of \$53 per credit.

Fees and Fines for Non-Instruction Related Services and Materials:

The Board requires that the level of charges be sufficient to ensure recovery of the cost of providing the services and materials as well as to recover the indirect costs associated with these activities. These include charges for auxiliary services, e.g., housing, food services, student centers, parking, and bookstores; charges for facilities use; etc. Institutions also set the level of fines for violation of campus regulations, such as late fines for library books, parking fines, etc.

Application Fee

The President or designee determines application fees. The University may assess greater application fees for admission to selected programs. The relevant application fee must be received before the application will be evaluated. Application Fees are not refundable.

Application Fee Deferral Program

Institutional executives may, upon request, defer the Application Fee for first-time freshmen or transfer students who, at the time of application, are either eligible for or participate in any of the following:

- 1) Free or reduced school lunch program;
- 2) TRIO-type college preparatory programs (e.g., Upward Bound, Talent Search, EOC, HEP);
- 3) State of Oregon or U.S. public assistance; and/or
- 4) College Board fee waiver
- 5) Foster Youth Tuition and Fee Waiver

Application fees deferred under this provision become payable upon the student's enrollment and receipt of financial aid funds. If a student does not complete the application process or does not enroll, the Application Fee is canceled.

Post baccalaureate, Non-graduate Student Classification

A holder of an accredited baccalaureate degree who has not been admitted to a graduate degree program and who submits an official application for admission to pursue a second baccalaureate degree or enroll in course work not to be used for graduate credit is called a post baccalaureate, non-graduate student and is assessed tuition at undergraduate rates.

Baccalaureate degree holders who are admitted to postbaccalaureate, non-graduate status at undergraduate tuition rates are precluded from claiming graduate credits for graduate courses taken while in this status. However, individual institutions may allow the reservation of not more than six of their graduate credits per term to apply in their institution's graduate programs. Graduate credits reserved in combination as an undergraduate and post baccalaureate, non-graduate cannot exceed 15 credits. Baccalaureate degree holders who are not admitted to postbaccalaureate, non-graduate status will be assessed graduate tuition rates.

Students who are admitted to an advanced degree program may convert to post baccalaureate, non-graduate student status only if the graduate degree has been awarded, if a student has been dropped from the degree program by the institution, or

upon a request approved by the dean of the Graduate School for voluntary relinquishment of graduate status.

Students in the education programs who are admitted to the 45-hour standard norm certificate program are not eligible for the post baccalaureate, non-graduate student status. Graduate tuition rates are applicable whether students in the program seek graduate credit.

Reduced Tuition Policies

WOU's commitment to 40-40-20 is achieved through an array of innovative reduced tuition programs and policies. These programs and policies promote the goals of providing accessibility to higher education by assuring college is affordable and relevant to the realities of today's student population.

Approved Programmatic Student Financial Aid Programs

Student financial aid programs are funded through institutional resources. The policies governing each program specify the extent to which the enrollment fees are to be reduced. The combined total aid for a student may not exceed the total enrollment fees for that student.

Western Oregon University's student financial aid offerings are comprised of programs like others offered across the country (often referred to as "fee waivers", "tuition discounts" or "tuition remissions") enhanced by innovative initiatives specific to the state of Oregon. The objective of programmatic student aid programs is to provide financial incentives for certain student groups to enroll. As an enrollment management tool, programmatic student aid allows an institution to target specific campus enrollment goals including recruitment of needy or meritorious students, international students, athletes, and other student populations. The following are summaries of WOU student financial assistance programs:

Diversity Programs

WOU Educational Diversity Initiative

Criteria: This program is open to all students, resident or nonresident, undergraduate or graduate. Under the guidelines approved, each campus may have a program of its own design and may describe the program in the manner it wishes. Similarly, the program may consider different factors in making awards and may offer one or more tuition and fee remission programs if it maintains its commitment to diversity. Under these guidelines, campuses may consider different factors in support of their educational mission.

Awards: Rather than a prescribed allocation of funds for educational diversity fee remissions, each institution has the discretion to determine the remittance amount and allocation schedule. Campuses may make partial or full waivers based on need or to expand the number of students who receive at least some funding support. Awards are not transferable. Students may not take a tuition

remission with them if they move to another public university but will be evaluated based on the receiving school's educational diversity needs.

Contract and Grant

Contract and Grant: Academic Year

Criteria: This provision is for students who participate in specific courses or programs during the academic year funded by grant or contract with an outside agency or firm.

Awards: Awards are generally for remission of Tuition only, depending upon agreement with the granting agency.

Contract and Grant: Summer Session

Criteria: This provision is for students who participate in specific courses or programs during the summer session funded by grant or contract with an outside agency or firm.

Awards: Awards are generally for remission of Tuition only, depending upon agreement with the granting agency.

WOU Supplemental Tuition Grant Program

Criteria: The WOU Supplemental Tuition Grant is a need-based tuition grant program available to qualified Oregon resident students.

Awards: These supplemental tuition grants may vary at institutional discretion but may not exceed the total Tuition assessed for the regular academic year.

VOYAGER Fee Remission

The Voyager Tuition Assistance Program (Voyager) was implemented in the Fall of 2005 in response to a direct gubernatorial request and is intended for National Guard and Reservists who have been in an area of hostility since September 2001 (9/11).

Criteria: Voyager is a tuition benefit that is available to Oregon veterans who served as members of the National Guard or Reserves in an active-duty capacity in a combat zone on or after September 11, 2001.

Under this program, eligible student veterans will be awarded a fee remission for no more than the difference between campus tuition and mandatory fees and expected military tuition benefits. This program is meant to work in conjunction with other educational aid programs; thus, you are still responsible for obtaining federal military tuition benefits. If you are not eligible for federal tuition benefits, you must demonstrate proof of ineligibility.

Awards: Voyager is a "last dollar award," meaning it works to ensure that you do not pay tuition costs if your other federal military education benefits fall short. The typical maximum length of the award is four years for undergraduate programs (a

fifth year may be approved under certain programs). This benefit is only available to those seeking their initial bachelor's degree, and it carries a maximum credit limit of 15 course credits beyond the minimum needed for degree completion.

The Voyager Tuition Assistance Program does not cover E-Campus or Distance courses. This benefit is not transferable to a veteran's spouse or dependents.

Veteran's Dependent Tuition Waiver

Criteria: The Veteran's Dependent tuition waiver is for qualified students accepted into a baccalaureate or master's degree program at a public university. A qualified student is a child (includes adopted child or stepchild), spouse, or an un-remarried surviving spouse of a service member or a child of a Purple Heart recipient.

The service member is one who:

- 1) Died on active duty;
- 2) Has a 100% total and permanent service-connected disability rating as certified by the United States Department of Veterans Affairs; or
- 3) Died as a result of a military service-connected disability.

The Purple Heart recipient is a person, alive or deceased, who:

Was relieved or discharged from service in the Armed Forces of the United States with either an honorable discharge or a general discharge under honorable conditions; and

Was awarded the Purple Heart in 2001 or thereafter for wounds received in combat.

An eligible child must be 23 years of age or younger at the time the child applies for the waiver. A child who is older than 23 years of age is eligible for a waiver for a master's degree program if the child:

- 1) Applied for and received a waiver for a baccalaureate degree when the child was 23 years of age or younger; and
- 2) Applied for a master's program waiver within 12 months of receiving a baccalaureate degree.

The qualifying new, transfer, or community college co-enrolled student must meet Oregon residency requirements, which generally describes an Oregon resident as a person with a bona fide fixed and permanent physical presence established and maintained in Oregon of not less than 12 consecutive months immediately prior to the term of entry.

Awards: The award may be granted for credit hours for courses that are offered at an eligible post-secondary institution. The award does not cover other mandatory

enrollment and course specific fees. The maximum waiver granted under this remission program shall be:

- 1) The total number of attempted credit hours equal to four years of full-time attendance for a baccalaureate degree; and
- 2) The total number of attempted credit hours equal to two years of full-time attendance for a master's degree.

Notwithstanding sections 1 and 2 of this paragraph, a waiver may not exceed the total number of credit hours the qualified student needs to graduate with a baccalaureate or a master's degree. Transferred credit hours accepted for a degree program may or may not count toward the total credit hours needed for degree completion. The amount of tuition waived may be reduced by the amount of any federal aid scholarships or grants, awards from the Oregon Opportunity Grant program established under ORS 348.205, or any other aid from the eligible post-secondary institution, received by the qualified student. The amount of tuition waived may not be reduced by the amount of any Survivors' and Dependents' Educational Assistance under 38 U.S.C. Chapter 35 paid to a qualified student.

Awards to children of Purple Heart recipients apply only to students admitted as new but not continuing for Fall 2013 or thereafter.

Statutory Authority: ORS 351.656 Waiver of tuition for family members of deceased veterans; limits on waiver; conditions

Nonresident Veteran Fee Remission

As required by Law, every public university shall participate to the fullest extent allowed in the federal educational assistance programs under the Supplemental Appropriations Act of 2008 (e.g., Post 9/11 G.I. Bill and its component Yellow Ribbon Program), to reduce the overall tuition rate for students eligible under this policy.

Criteria: The Nonresident Veteran Fee Remission is a tuition and fee reduction for qualified students who are attending classes as an admitted undergraduate or graduate at a public university, and who meet one of the following sets of criteria:

- 1) Is not an Oregon resident and:
 - a. Served in the Armed Forces of the United States;
 - b. Was relieved or discharged from that service with either an honorable discharge or a general discharge under honorable conditions as shown on an original or certified copy of the student's DD-214; and
 - c. Provides proof that the student has established a physical presence in Oregon within 12 months of being enrolled at one of the public universities.

OR

- 2) Was a resident of Oregon who left the state within the previous five years to serve, and who subsequently served, in the Armed Forces of the United States or in an international position with the state, federal government or a humanitarian aid organization.

OR

- 3) Was a resident of Oregon who left the state more than five years ago to serve, and who subsequently served, in the Armed Forces of the United States or in an international position with the state, federal government or a humanitarian aid organization and never established residence in another state.

Award: Qualified **undergraduate** students who meet criteria 1 and are admitted for enrollment for an academic term prior to Fall 2013 are charged tuition and fees no greater than the resident rate, plus 50 percent of the difference between the resident tuition and fee total and the nonresident tuition and fee total with the following listed qualifications; students admitted as new but not continuing undergraduate students for the Fall 2013 term or later are charged tuition and fees no greater than the resident rate with the following listed qualifications:

Qualified **graduate** students who meet criteria 1 and are admitted for enrollment for an academic term prior to Fall 2014 are charged tuition and fees no greater than non-resident tuition and fee total with the listed qualifications; students admitted as new but not continuing graduate students for the Fall 2014 term or later are charged tuition and fees no greater than the resident rate with the following listed qualifications:

Qualified **undergraduate or graduate** students who meet criteria 2 or 3 and are admitted as new but not continuing students for the Fall 2015 term or later are charged tuition and fees no greater than the resident rate with the following listed qualifications:

A student who served in the Armed Forces of the United States or in an international position with the state, federal government, or a humanitarian aid organization *and* who receives federal tuition benefits in excess of the tuition and fees charged under this policy shall pay tuition and fees equal to the federal tuition benefits received.

Distance education and self-support courses as identified by each public university are excluded from this discount.

If a nonresident student is otherwise eligible for tuition benefits under this discount and receiving federal vocational rehabilitation education benefits, that student shall pay full nonresident tuition and fees charged by the enrolling public university.

Statutory Authority: ORS 352.375

Foster Youth Tuition Waiver

The Foster Youth Tuition and Fee Waiver originated with the passage of House Bill 3471 in the 2011 Regular Session of the Oregon Legislative Assembly and is intended

to “increase access to higher education for current and former foster children by providing a Tuition and Fee Waiver” to minimize the amount of tuition absorbed by the student. It was further amended by HB 2095 in the 2013 Regular Session to align the definition of “former foster youth” with the federal standard.

Criteria: The Foster Youth Tuition and Fee Waiver is open to qualified current and former foster children enrolled as undergraduate students in an institution of higher education in Oregon for the purposes of pursuing an initial undergraduate degree (as evidenced by admission into an undergraduate degree program). This program waives tuition and fees for current and former foster youth who enroll prior to reaching 25 years of age until the student receives “the equivalent of four years of undergraduate education.”

To qualify for the program, the student must:

- 1) Have spent at least 180 days in substitute care after age 14, was not dismissed from care prior to reaching 16 years of age and either left foster care (had ward ship terminated) or completed high school/GED within the previous 3 years; and
- 2) Be admitted to an undergraduate degree program and enroll prior to reaching 25 years of age; and
- 3) Submit a completed FAFSA (Free Application for Federal Student Aid) for each academic year they are eligible for the program; and
- 4) Four years after the first academic year at an institution of higher education, have completed a minimum of 30 volunteer service hours in the previous academic year performing community service activities such as mentoring foster youth or assisting in the provision of peer support service activities, according to policies developed by the institution of higher education at which the current or former foster child is enrolled.

Awards:

A qualified student for The Foster Youth Tuition and Fee Waiver is entitled to waiver of tuition and fees as noted below:

Tuition for academic credit courses (at base or differential rates depending upon program to which student is admitted) but not for noncredit courses.

Mandatory enrollment fees: building, incidental, health service, recreation center, or other mandatory fees that may be added from time to time.

One-time fees: matriculation.

Fees required for instruction related services such as lab or course fees that are assessed upon registration for a particular course.

The waiver excludes all fees and fines for non-instruction related services and materials such as residence hall room and board, dining services, parking fees and fines, library fines, etc. In addition, textbooks and other course materials not assessed as part of a course fee are also excluded. Fees considered as “pass

through” fees, paid to an outside provider, are exempt from the Tuition and Fee Waiver.

Eligible students may receive the Foster Youth Tuition and Fee Waiver for up to 12 terms of full-time study or the equivalent. Attendance at less than full-time will be prorated accordingly.

If a student meets all other criteria for eligibility but does not require the Foster Youth Tuition and Fee Waiver, the student shall remain eligible until the student receives the equivalent of 4 years of undergraduate education.

As noted previously, to be considered eligible for this program, the student must complete and submit a FAFSA for each academic year they are eligible for the program. Awards made under The Foster Youth Tuition and Fee Waiver shall be applied after the following:

Any federal Pell or Supplemental Educational Opportunity Grants (SEOG)

Oregon Opportunity Grant established under ORS 384.205

Any other gift, grant or scholarship received from the institution of higher education which may be applied to the tuition and fees covered under this program.

For purposes of this program, non-tuition scholarships from sources outside of the University, which pass through either OSAC or the institution, are not included in the calculation of the tuition and fee waiver award amount.

Definition of Terms: For purposes of this waiver, the following terms are defined as follows:

A “former foster child” is defined as an individual who, for a total of six or more months while between 14 and 21 years of age, was: (a) A ward of the court pursuant to ORS 419B.100(1)(b) to (e) and in the legal custody of the Oregon Department of Human Services (or one of the nine federally recognized Tribes in Oregon) for out-of-home placement and not dismissed from care before reaching 16 years of age; or (b) An Indian child subject to the Indian Child Welfare Act (25 U.S.C. 1901 et seq.), under the jurisdiction of a tribal court for out-of-home placement and not dismissed from care before reaching 16 years of age.

The “equivalent of four years of undergraduate education” and “equivalent of four academic years” is defined as up to 12 terms of full-time study or the equivalent. Attendance at less than full-time will be prorated, accordingly.

Statutory Authority: ORS 351.293 Tuition waiver for foster child

Other Reduced Tuition Policies

Western Undergraduate Exchange

Tuition for students admitted under the Western Undergraduate Exchange (WUE) program is assessed at 150% of the prevailing resident undergraduate tuition rate. The WUE program allows first-time enrolling, nonresident undergraduate students from participating states to pay 150% of resident tuition when enrolled in selected programs at Oregon Public Universities. Students participating in this program must maintain enrollment in these designated programs to retain qualification. The time spent as a WUE student cannot apply toward residency status. Students previously or currently enrolled in Oregon Public Universities are not eligible for this program. The institutions are not obligated to notify prospective, admitted, or enrolled students who are eligible for this program. Institutions that implement this program must report WUE enrollment as directed and validate WUE students quarter to quarter. Consistent with the policy of nonresident students covering the full cost of instruction, institutions participating in the WUE should carefully consider whether high demand programs should be eligible for the reduced rates.

Tuition Equity

In keeping with Oregon's commitment to creating innovative programs that make college more affordable and more relevant to the realities of today's workforce and economy, the 2013 Oregon Legislature passed the Tuition Equity Act.

The Tuition Equity Act, as outlined in House Bill 2787 (2013), became law on April 2, 2013, and exempts the following students from paying nonresident tuition and fees for enrollment in Oregon's public universities:

- 1) Students who are not citizens or lawful permanent residents of the United States provided the student:
 - a. During each of the three years immediately prior to receiving a high school diploma or leaving school before receiving a high school diploma, attended an elementary or a secondary school in Oregon;
 - b. During each of the five years immediately prior to receiving a high school diploma or leaving school before receiving a high school diploma, attended an elementary or a secondary school in any state or territory of the United States, the District of Columbia, or the Commonwealth of Puerto Rico;
 - c. No more than three years before initially enrolling in a public university listed in ORS 352.002 (EOU, Oregon Tech, OSU, PSU, SOU, UO, and WOU), received a high school diploma from a high school in this state or received the equivalent of a high school diploma (such as a GED); and

d. Shows intention to become a citizen or a lawful permanent resident of the United States by submitting to the public university the student attends or plans to attend:

i. An official copy of the student's application to register with a federal immigration program or federal deportation deferral program or a statement of intent that the student will seek to obtain citizenship as permitted under federal law; and

ii. An affidavit stating that the student has applied for a federal individual taxpayer identification number or other official federal identification document.

2) Students who are financially dependent upon a person who is not a citizen or a lawful permanent resident of the United States if the student:

a. During each of the three years immediately prior to receiving a high school diploma or leaving school before receiving a high school diploma, attended an elementary or a secondary school in this state and resided in this state with the person upon whom the student is dependent;

b. During each of the five years immediately prior to receiving a high school diploma or leaving school before receiving a high school diploma, attended an elementary or a secondary school in any state or territory of the United States, the District of Columbia, or the Commonwealth of Puerto Rico and resided with the person upon whom the student is dependent;

c. No more than three years before initially enrolling in a public university listed in ORS 352.002 (EOU, Oregon Tech, OSU, PSU, SOU, UO, and WOU), received a high school diploma from a secondary school in this state or received the equivalent of a high school diploma; **and**

d. For a student who is not already a citizen or lawful permanent resident of the United States, shows intention to become a citizen or a lawful permanent resident of the United States by submitting to the public university the student attends or plans to attend:

i. An official copy of the student's application to register with a federal immigration program or federal deportation deferral program or a statement of intent that the student will seek to obtain citizenship as permitted under federal law; and

ii. An affidavit stating that the student has applied for a federal individual taxpayer identification number or other official federal identification document.

A student will continue to qualify for exemption from nonresident tuition and fees (e.g., be able to pay in-state tuition rates) under subsection (1) or (2) above for five years after initial enrollment.

A student who is a citizen or a lawful permanent resident of the United States and who has resided outside of Oregon for more than three years while serving in the Armed Forces of the United States, but who otherwise meets the requirements of subsection (1) or (2) above, shall qualify for exemption from nonresident tuition and fees for enrollment in a public university listed in ORS 352.002 without having to reestablish residency in Oregon.

SEIU Employee Benefit

The SEIU reduced tuition benefit provides a 20% discount on undergraduate or graduate tuition for up to 12 credits per term. The benefit is open to eligible SEIU Local 503 members.

Employee Tuition Benefit

The academic term rate for employees is 30% of resident undergraduate tuition assessed at the teaching institution, rounded to the nearest dollar. For campuses where an undergraduate differential tuition structure is in effect, the staff fee rate will be *charged at the "regular" (not differential) resident undergraduate tuition rate for both undergraduate and graduate student employees*. Charges for Building, Health Service, Recreation, Student Union, and Incidental Fees do not apply; nor are employees entitled to health services or incidental fee services through this program. No Application Fee will be required for employees and no breakage or other deposit is required when registering for classes. Other fees such as lab or course fees are assessed at the full rate and no discount is provided.

Staff fees are not applicable to certain courses. For a complete reference list of excluded programs, please go to <http://www.wou.edu/hr/benefits/stafftuitiondiscount/>. Excluded programs are determined at the discretion of the institution's president and the notice of exclusion must be filed with the institution's Registrars' office prior to the first day of registration for a term.

1. On approval of the president or designee of the teaching institution and with the concurrence of the employee's immediate supervisor, the staff fee is available to employees appointed at half-time (.5 FTE) or more (not including temporary classified employees or other student employees).
2. To qualify for this fee, the staff member must meet the criteria no later than the first day of classes of the term of enrollment. The maximum number of credits to which the staff fee may be applied is 12 credits per quarter or per semester. Some exceptions made for retired employees and employees on leave.

3. Employees enrolled for more than 12 credits in one term will pay for each additional credit at the campus designated per credit tuition rate applicable to resident undergraduate or graduate students, depending upon the employee's degree status.
4. For purposes of this rule, the term "employee" may include persons with full-time courtesy appointments who provide a benefit to the institution in the form of teaching, research, or counseling, under the direction of the institution and using the facilities of the institution.
5. Retired employees and employees on leave are eligible for staff fee privileges. Subject to the approval of the president or designee of the teaching institution, the maximum credit limitation may be waived for retired employees and for employees on leave. See exception under Senior Citizen Tuition.
6. Employees who use the staff fee for courses away from their home institution are subject to staff fee policies and procedures of the instructing institution. *There is no fee plateau at any campus for employees, family and dependents, or retired staff.*
7. Employees may be permitted to take *noncredit* courses at *one-third* of the fee assessed to other registrants. Teaching units are not required to extend staff fees for noncredit courses, self-sustaining workshops, or self-support credit courses.
8. Employees on furlough or lay-off status may be eligible for staff fees in accordance with provisions of a collective bargaining agreement.
9. No tuition shall be assessed to courses enrolled in by employees with a grading option of 'audit.' Attendance under such condition must be with the instructor's consent and on a space-available basis. Institutions are required to maintain a record of the courses audited. Courses approved for audit by the instructor confer no credit to the student, are not charged staff fee rates or regular tuition, and may be used in addition to staff fee privileges during a term. However, any applicable course, lab or material fees associated with auditing for-credit classes will be assessed by the institution and is the responsibility of the employee. This provision cannot be subdivided in conjunction with the Employee Family Member and Domestic Partner Transfer provisions.
10. The benefit may be used at any Oregon public university.

Reduced Tuition Benefit for Family Members and Domestic Partners of Employees

To improve the recruitment and retention of high-quality faculty and staff at Oregon's public universities, the staff fee policy is extended to qualified family members, eligible dependents, as well as domestic partners and their eligible dependents on a limited basis. The academic term rate for family members is 30% of resident undergraduate tuition assessed at the teaching institution, rounded to the nearest dollar. For campuses where an undergraduate differential tuition structure is in effect, the staff fee rate will be *charged at the "regular" (not differential) resident undergraduate tuition rate for both undergraduate and graduate student employees*. Qualified family members including spouse, domestic partners, and dependents receiving the transferred benefit are

responsible for all mandatory enrollment fees such as Building, Health, Recreation, Student Union, Incidental, Matriculation, and Other fees (Laboratory/Course Fees, Late fees, and Registration fees), if applicable. Breakage and/or other mandatory application deposits are required of the participating family member to register for classes.

Staff fees are not applicable to certain courses. For a complete reference list of excluded programs, please go to <http://www.wou.edu/hr/benefits/stafftuitiondiscount/>. Excluded programs are determined at the discretion of the institution's president and the notice of exclusion must be filed with the institution's Registrars' office prior to the first day of registration for a term.

1. The staff fee provisions may be transferred to a qualified family member or domestic partner of employees appointed at half-time (.5 FTE) or more (not including temporary classified employees, graduate assistants, or other student employees). Employee eligibility is verified through Human Resource System records. To qualify for this fee, the family member, domestic partner, or eligible dependent must meet the criteria no later than two weeks prior to the first day of classes of the term of enrollment.

2. For purposes of this policy, the eligible family members include spouse, domestic partner, dependent children, and dependent children of domestic partners in accordance with IRS Code 152 and Section One of the Public Employees Benefit Board. If requested to do so, the employee is expected to verify family member or domestic partner eligibility by providing documented proof such as a tax return from the prior year.

3. The maximum number of transferrable credits is 12 credits per quarter or per semester. Only one staff member, spouse, domestic partner, or dependent may use the staff fee benefit per term or semester. The benefit may not be subdivided among family members during a term.

4. The qualified family member or domestic partner enrolled for more than 12 credits in one term must pay for *additional credits* at the per credit tuition rate applicable to resident undergraduate or graduate students, depending upon the family member's or domestic partner's degree status. All applicable credits will be charged at the relevant resident tuition rate.

5. The President of a public university may exclude certain programs from the policy. For a comprehensive list of excluded programs please visit the website for the Office of Human Resources.

6. The transfer of staff fee benefits is not available for retired employees.

7. Qualified family members or domestic partners of employees who use the staff fee for courses away from the employee's employing institution are subject to staff fee policies and procedures of the instructing institution. *There is no fee plateau at any campus for employees, retired staff, domestic partners, or eligible dependents.*

8. Qualified family members or domestic partners of employees may be permitted to take noncredit courses at approximately one-third of the fee assessed to other

registrants. Teaching units are not required to extend staff fees for noncredit courses, self-sustaining workshops, or self-supported credit courses.

9. Eligibility of employees on furlough or lay-off status is subject to applicable collective bargaining agreements.

Graduate Assistants

Graduate students appointed by the institution and paid at established institutional salary rates as graduate teaching assistants, graduate research assistants, or graduate fellows are exempt from the payment of tuition up to the first 12 credits per term subject to institutional policy. Appointment as an assistant may not be for less than .49 FTE for the term of appointment.

The Tuition will be assessed to the employing account or department within the institution, not to exceed the graduate resident, full-time student tuition per term. When an assistant is authorized to exceed 12 credits per term, the institution shall charge the assistant the resident overload tuition for the excess credits. The enrollment privilege does not apply to self-support courses.

If an assistant has been on an academic year appointment, serving in that appointment Spring term, and the institution intends to reappoint the assistant in the following Winter & Spring terms, the assistant may exercise the study privilege during the interim summer term upon approval of the institution.

Graduate assistants are assessed and are individually responsible for payment of the Building, Health, Incidental, Recreation Center, Student Union, and other mandatory fees as approved for the institution and program in which they are enrolled at the credit hour level carried, and at rates applicable to graduate students. Overload Tuition is assessed at the resident graduate student Tuition rate for each overload hour.

Resident Oregon Senior Citizen Program

The Senior Citizen Program is designed for persons not seeking credit or working toward a degree. If credit is sought, charges for special materials or fees, if any, will be assessed according to applicable tuition schedules and records will be maintained. Self-support classes are excluded from this benefit and Incidental Fee services are not available. Oregon resident senior citizens, age 65 or older, may attend classes on a space-available basis.

Statutory Authority: ORS 351.658 Waiver of tuition for Oregon residents at least 65; conditions for waiver; rules

Auditors

Students enrolled in a combination of credit and audit courses or audit only will be assessed for the total credits under the credit tuition and fee schedule appropriate to their classification and residency.

University/School Partnership Voucher Program

School districts having contracts with a public university to supervise educator professionals preparing for Oregon licensure may exercise these provisions.

Earning the Voucher

For each permissible activity provided under contract with a cooperating district (see 'a' and 'b' below), a district earns a voucher to be used by any licensed educational professional employed by the district at the public university voucher fee rate. The rate is currently one-third of the tuition charged for the course.

A 'voucher' allows one individual to register for up to 8 quarter credit hours in the term it is used. The total reduced fee credits awarded for practica and student teaching may not exceed 11 in a year, per each university student provided services by the district.

a. Supervised full-time student teaching: Voucher privileges of 5 credit hours may be awarded for supervision of the final full-time student teaching per quarter. Student teaching is the culminating, full-time supervised teaching experience provided for students completing a program approved by the Teacher Standards and Practices Commission, leading to Initial Licensure in one or more of four authorizations: Early Childhood, Elementary, Middle, and High School; and specialty endorsements.

b. Experiential preparatory practica or part-time student teaching: Voucher privileges of 3 credit hours may be awarded for supervision of students in experiential preparatory practica or part-time student teaching per academic quarter. These are practica assigned to or required of the student prior to or concurrent with student teaching and block practica and/or other miscellaneous practica offered by colleges and divisions of education for students completing a program approved by the Teacher Standards and Practices Commission, leading to Initial Licensure in one or more of four authorizations: Early Childhood, Elementary, Middle, and High School; and specialty endorsements.

Redeeming Reduced Fee Credits

c. Earned voucher privileges must be used by a licensed educator professional employed by the school district within five successive academic quarters (including summer session) following the quarter in which the supervision is provided, after which time the voucher is void.

d. The voucher is applicable only up to 8 credit hours in any academic quarter for any one licensed educator professional, including summer session, even though the district may have earned two or more enrollment privileges, or if the licensed educator professional using the privilege enrolls for fewer than 8 credits.

Unused portions of a voucher may not be carried to another term or used by another teacher.

- e. A voucher may be used during any academic term (including summer session) at the issuing institution, which has a teacher preparation program. Institutions may enter “partnerships of trade” with any sister institution if they are willing to accept vouchers from other institutions.
- f. Each institution may set limits on courses available for those redeeming vouchers (for example, courses in summer session, distance education, continuing licensure, continuing/extended education). Each institution will indicate on the voucher the existence of restrictions.
- g. The voucher may also be redeemed by an administrator, counselor, or other licensed educator professional in a cooperating district.
- h. Institutions with current contractual obligations may elect to defer compliance of the rate until the expiration of the existing contract.

Other Provisions

- 4) If the licensed educator professional using a voucher registers for more than 8 credit hours, the first 8 hours may be taken at the institution’s voucher rate. Credit hours more than 8 shall be at the appropriate credit hour rate (graduate or undergraduate, resident or nonresident) and the institution shall charge all enrollment fees applicable to the total number of hours for which the licensed educator professional is registering.

Other Remission Programs

Institutions may create individual institution fee remission programs to address enrollment management and financial aid program needs. The institution will report to the Board on the creation of each program following guidelines approved by the WOU Board of Trustees.

Awards: Awards may vary in amount but cannot exceed the total nonresident undergraduate or graduate Enrollment Fees (Tuition, Building, Incidental, Recreation Center Building Fee, Student Health Building Fee and Health Service Fees).

Refunds, Waivers, and Accounts Receivable Policies

A. Refund Policies

Refund policies for course load reduction or withdrawal are separately developed by each campus and adopted under institution fees and charges procedures. Refunds may be granted to students in accordance with the refund schedule on file with the Registrars or Accounting & Business Services. This schedule shall be prepared annually.

Military Duty Refund Policy

Any student with orders to report for active military duty may withdraw at any time during the term and receive a full refund. If sufficient course work has been accomplished and the instructor feels justified in granting credit for the course work completed, credit may be granted, and no refund will be given.

B. Waiver of Certain Student Fees

Certain student fee charges may be waived when regulations of federal agencies or contract agreements preclude the assessment of those fees. Please contact Western Oregon University's Accounting & Business Services office to determine which fee charges are eligible, if any, for this waiver.

C. Institution Authority to Adjust Charges

Authorized institution officials may make tuition refunds and waive fines or charges that result from circumstances beyond the student's control or are for the best interest of the institution.

D. Revolving Charge Accounts Policy

Extended payment terms utilizing a revolving charge account method adopt rules creating the Revolving Charge Account Plan and describe the terms and conditions applicable to the Plan.

Transactions covered by the Plan may include (by way of description and not limitation) tuition, fees, housing charges and other obligations primarily involving students; facilities rentals, lease agreements, program user charges and other transactions with non-students; and fines and penalties, incurred by anyone.

These rules shall:

- 1) Describe the interest to be charged, as well as service charges, collection and other fees and costs, if any, and penalties that would apply should an account become delinquent.
- 2) Provide for an agreement to be signed by the obligor for charges, except for debts arising from fines, penalties and the like; and
- 3) Provide that tuition and fees incurred in any given term are paid in full prior to enrollment in any subsequent term.

E. Interest on Overdue Accounts

Section 1: Western Oregon University may, pursuant to an institutionally adopted rule, charge nine percent interest on all liquidated debts that are past due. A liquidated debt is one in which the amount owed is certain, e.g., a standard fee or a debt based on a promissory note.

Section 2: Where the institution so provides by administrative rule and a contract or note signed by the obligor so specifies, the institute may charge not more than 12 percent interest on the obligation evidenced by the signed note or contract.

The University may not charge interest under both Sections 1 and 2, above, simultaneously on a single obligation; in no event shall the institution charge more than 12 percent interest.

Institution rules may provide for interest charges to begin immediately following the date on which a debt becomes overdue or after a specified waiting period.

Student Involvement in Development of Proposed Tuition Rates

The Tuition and Fee Advisory Committee advises the University President on the President's recommendations to the Board of Trustees regarding resident tuition and mandatory enrollment fees for the upcoming academic year. As required by HB4141, the Committee consists of two members from the student government (ASWOU), two students from historically underserved populations, two faculty members, and two administrators; in addition, several at-large students serve on the Committee. All meetings are public.

Finance & Administration Committee (FAC), April 7, 2023

University Budget Advisory Committee (UBAC Report)

DATE: April 7, 2023

TO: WESTERN OREGON UNIVERSITY BOARD OF TRUSTEES:
FINANCE & ADMINISTRATION COMMITTEE

FROM: UNIVERSITY BUDGET ADVISORY COMMITTEE

RE: UBAC REPORT

Beginning March 16, UBAC is shifting our meeting time from 1-3 pm to 3-5 pm. This will allow members of Academic Affairs leadership to attend more easily and align to the schedule of the Academic Sustainability Committee for continued collaboration.

Budget Conversations completed or scheduled:

February 16, 2023: NWCCU Accreditation Implications for Fiscal Sustainability

March 16, 2023: Positioning WOU for success in the Oregon State Budget

May TBA: budget reallocation tool

UBAC met jointly with the Academic Sustainability Committee for a conversation with Dr. Tressa Shavers from NACUBO (National Association of College and University Business Officers) to review and discuss the use of the strategic budget reallocation tool. We affirm the use of this tool to foster mission-aligned transparent budget decision making and plan to share more information at a future campus conversation.

UBAC has initiated FY 2024 budget planning. Camarie Moreno is currently gathering budget requests from all units, which will be combined with enrollment and retention evidence for budget planning. In early April, we will meet with representatives from Institutional Research, Admissions, Housing and Financial Aid, and Student Success & Advising to gather enrollment and retention evidence. Our current model does not incorporate additional legislative spending currently under consideration, but should such funding emerge, UBAC is prepared to use the budget reallocation tool to provide input on allocations. UBAC also is planning to engage in ongoing assessment and adjustment to the five-year fiscal sustainability model and to review, via the reallocation tool, potential disbursements of savings and revenues that emerge.

Finally, UBAC recognizes the strain on all members of our community in our budget reduction process and we want to stress the importance of building shared

understanding around the budget process and building our capacity to advocate for ourselves. Budgets manifest our values, and we want to tell the story of our students and how our budget choices affect them. We will facilitate the gathering of stories across campus about budget efficiencies and revenue generation through the lens of student success and support.

Finance & Administration Committee (FAC), April 7, 2023

University Technology Advisory Committee (UTAC) Report

UTAC met twice during spring quarter, once on January 20, 2023 and again on February 17, 2023.

During the January meeting, UTAC reviewed two policies. First, the committee briefly revisited the Learning Management System Policy, which was previously approved by UTAC in 2019 and is now making its way to Cabinet for final approval. Second, the committee reviewed the new University Names Policy Draft that is also going through the policy review and approval process. The committee also hosted Dr. Judy Silva, Associate Provost for Academic Effectiveness, who presented information about Digitation, an ePortfolio Solution and Assessment Management System that will be piloted thanks to funding from a Credit for Prior Learning grant. During the February meeting, UTAC met with President Jesse Peters to discuss the revised charge and membership structure that the committee has been working on this academic year. The president approved the changes proposed by the committee, and several more adaptations were suggested during and after the conversation. When the new charge takes full effect in Fall 2023, the committee will begin to take a more active role in planning and communication related to campus technology.

Finance & Administration Report

Accounting & Business Services (Accounts Receivable)—Dona Vasas

- Spring tuition & fee charges were assessed on March 8th, 2023.
- Winter term third-party billing is almost complete.
- Quarterly campus student Accounts Receivable training held February 1st, 2023.
- 1098-T statements were sent at the end of January.

Accounting & Business Services (Controller)—Shadron Lehman

- We held 5 training sessions in January and February to present and answer questions with regards to the new travel policy, totaling 98 participants. The session dates/numbers are as follows:
 - Jan 1 - Athletics - 20
 - Jan 20 - Admissions - 9
 - Feb 8 - general staff - 49
 - Feb 10 - general staff - 31
 - Feb 15 - Budget Authorities – 9

Budget & Planning Office—Camarie Moreno

- FY24 Budget development is underway.
 - Incorporates \$5M of budget reductions identified by senior leadership.
- Monitoring FY23 budget and completing a monthly salary saving sweep.
 - As of February \$2.6M of savings have been identified (as hires are made for the remainder of the year, this will be reduced to allocate funding back to departments).
- The Tuition and Fee Advisory Committee (TFAC) has completed its recommendation to the President for undergraduate resident tuition rate increase.
- Incidental Fee Committee (IFC) has completed its work setting the fee and allocation for next year; Incidental Fee Steering Committee (IFSC) will begin its work shortly with the goal of improving the process.
- The Integrated Postsecondary Education Data System (IPEDS) finance survey was completed.
- \$12.375M of \$16.5M of steampipe has been received with the final quarter distribution anticipated.
- To date in FY23, \$1.2M of the 2021 Capital Improvement & Renewal funds have been received for reimbursed capital projects.

Campus Public Safety & Facilities Services—Rebecca Chiles

Facilities Services

- Heavy focus on campus spring cleaning week of Spring Break
- Ongoing/Upcoming:
 - Chiller cleaning to prepare for warm weather.
 - Grounds really focuses on preparing the campus grounds for commencement, upcoming tours, camps, with the arrival of the growing season.
 - Prioritizing work for some larger projects including summer.
 - Continuing to work on improving lighting on campus.

Campus Public Safety

- Self-defense training took place in February
- Emergency management training for the EPT in March
- Upcoming:
 - Self-defense training in spring term;
 - Finalizing locations for EV chargers on campus;
 - Preparing for commencement and summer training;
 - Making a video with a couple of students and Wolfie to demonstrate use of our emergency services in Spring Term.

Treasury Services—Darin Silbernagel

- Net cash position as of February 28, 2023 is \$47,349,803 (includes Steam Pipeline Project).
- For the next 4 months, the total projected inflow is projected at \$38,818,387.
- For the next 4 months, the total projected outflows are \$49,319,607.
- Projected ending is \$36,848,583 across all funds, \$23,848,583 excluding Steam Pipeline Restricted funding of \$13M carryforward to next year.
- Click here to view December [Cash Flow Narrative](#) and [Cash Flow Forecast](#).
- System of Award Management (SAM) has been updated with the expiration now February 16, 2024.

Capital Planning & Construction—Jason Krawzyck

- Year 4 (FY23)
 - USAC starting work to develop space standards. (First report to the campus about tracking building occupancy March 20th 2023)
 - Demolish Old College of Ed. (April 3rd 2023)
 - Hire General Contractor for Steam Pipeline. (February 13, 2023).
 - Updated Campus Plan through 2028 (December 18th 2023)
 - Click here to view additional [CPC Project updates](#).

University Computing Solutions—Bill Kernan

- Cyber-security presentation to Cabinet - March 8, 2023
- ASWOU cyber-security presentation to ASWOU 3/16/23
- Wireless replacement of 10-year old technology
 - Completed core campus
 - Resident Halls yet to be completed
- Computer lab upgrades and Classroom upgrades
 - Vick 219 camera upgrades
 - Vick 220 camera upgrades
- Go-live for Banner Financial Aid
 - This project lasted 18 months
 - Core project completed; continued support necessary