



Oregon

Kate Brown, Governor

Higher Education Coordinating Commission

Office of University Coordination

Budget & Finance

255 Capitol Street NE, Third Floor

Salem, OR 97310

www.oregon.gov/HigherEd

April 18, 2017

Craig Morris, Vice President
Finance & Administration
Southern Oregon University
Churchill 122
1250 Siskiyou Blvd.
Ashland, OR 97520

Dear Craig,

In response to April 10, 2017 guidance from Governor Kate Brown, the Higher Education Coordinating Commission (HECC) determined at its April 13 meeting that it requires additional information to complete its statutorily-required review of resident undergraduate tuition and mandatory enrollment fee increases in excess of five percent for the 2017-18 academic year. This document outlines the information requested of your institution. Requested information is organized according to the five criteria listed in Governor Brown's guidance. **Please submit the requested information by Wednesday, April 26, 2017.**

Criteria 1: Clear and significant evidence that the university gave serious consideration to alternatives that involved tuition and fee increases below the 5% threshold.

Please provide a single paragraph no greater than 250 words that explains the alternatives below the review threshold that were considered by the institution. The same paragraph should address the nature of the consideration provided to those alternatives. This paragraph will be provided to the Funding & Achievement Subcommittee and the full Commission. HECC staff believes the institutions are best equipped to provide this summary to Commissioners.

Additional information beyond this single paragraph—including any supporting information that the institution considers “clear and significant evidence”—may be submitted to HECC staff in the manner described below. This information will not be thoroughly summarized for the Commission by HECC staff and may not be presented to Commissioners as part of its meeting or docket item packet. It will, however, help to inform the HECC staff recommendation to the Commission. Again, the requested paragraph above will be included in Commission materials but will not at all constitute the entirety of information considered by staff or the Commission. In addition to the paragraph, Commissioners will also have a staff recommendation and an institution presentation to inform their respective votes. A word limit is necessary due to time and staffing constraints.

Criteria 2: Clear and significant evidence of how Oregonians who are underrepresented in higher education, including low-income students and students of color, would benefit more under the university's proposal than one that stays within the 5% threshold.

Please provide a single paragraph no greater than 250 words that describes the measures and actions planned as a result of the above-threshold tuition and mandatory enrollment fee increase that will benefit students who are underrepresented in higher education. This paragraph will be provided to the Funding & Achievement Subcommittee and the full Commission. HECC staff believes the institutions are best equipped to provide this summary to Commissioners.

Additional information beyond this single paragraph—including any supporting information that the institution considers “clear and significant evidence”—may be submitted to HECC staff in the manner described below. This information will not be thoroughly summarized for the Commission by HECC staff and may not be presented to Commissioners as part of its meeting or docket item packet. It will, however, help to inform the HECC staff recommendation to the Commission. Again, the requested paragraph above will be included in Commission materials but will not at all constitute the entirety of information considered by staff or the Commission. In addition to the paragraph, Commissioners will also have a staff recommendation and an institution presentation to inform their respective votes. A word limit is necessary due to time and staffing constraints.

Criteria 3: A plan for how the university’s board and central administration are managing costs on an ongoing basis.

Please describe your plan for how your university’s board and central administration are managing costs on an ongoing basis. In particular, please note ways that your cost-management strategies incorporate any of the following elements or themes:

- Instruction and service delivery that is responsive to demand;
- Use of a budget and/or financial management structure that encourages efficiency and precision;
- Use or development of reserves or fund balance—at the central and departmental levels—that maximizes institutional effectiveness;
- Computation of Return on Investment (ROI)—in terms of student-focused cost savings—of new or voluntarily increased administrative, faculty or service costs;
- Use of benchmarking to assess institutional efficiency and value to students;
- Regular engagement with the institution’s governing board on the institutional business model, operations and finances, including revenue/expense projections and budget-to-actual variances;
- Use of data and data systems to guide cost-containment efforts.

Criteria 4: A summary of how students, faculty and staff were consulted on the proposed tuition increases.

No additional information is required.

Criteria 5: A summary of how tuition will be affected should additional state funds beyond the number in Governor’s Recommended Budget be appropriated.

No additional information is required. The Commission expressed a desire to see a consistent format of any scheduled tuition/fee rate adjustments determined by the Public University Support Fund.

Any information provided in accordance with this request will help inform a staff recommendation to the Funding & Achievement Subcommittee at its May 10 meeting.

Please submit any materials suitable for email to andrew.rogers@state.or.us and bob.k.brew@state.or.us. I may also be reached by phone at 503.559.9075. Questions about this request may also be made to David Jarvis (david.jarvis@state.or.us 503.947.5985). David’s role will be purely administrative in this process. All substantive communications should be made to me and not David.

If you would like to schedule a time to review your institution’s efforts toward the criteria with HECC staff by phone, I am available May 1 and May 2. Unfortunately, I will be unable to meet in-person given the tight timeline and other scheduling complexities.

Best regards,



Andrew Rogers
Director, University Budget & Finance