

**Docket Item: 3.0 - Public University Tuition Setting – Summary and Calculations**

**Summary:**

The tuition setting process has concluded for six of the seven public universities. This document summarizes the current status of the 2023-24 tuition setting process at each of them. We do not believe any will be seeking Commission approval for an increase that exceeds the 5% threshold for resident, undergraduate tuition and mandatory enrollment fees. The appendices include an explanation of how the increases are calculated as well as detailed calculations.

**Docket Material:**

The table below summarizes the current status of tuition and mandatory fees at the seven public universities, according to HECC calculations.

<b>Institution</b>	<b>2022-23 Tuition and Fees</b>	<b>2023-24 Tuition and Fees</b>	<b>Increase %</b>	<b>Status</b>
EOU*	\$9,110	\$9,563*	4.97%*	Awaiting Board Approval
OIT	Cohort based tuition/fee rates; see appendix for more details		4.71% (Weighted)	Board Approved
OSU	Cohort based tuition/fee rates; see appendix for more details		3.89% (Weighted)	Board approved
PSU	\$9,837	\$10,188	3.57%	Board Approved
SOU	\$10,155	\$10,461	3.01%	Board Approved
UO	Cohort based tuition/fee rates; see appendix for more details		1.34% (Weighted)	Board Approved
WOU	\$9,486	\$9,780	3.10%	Board Approved
*Amounts noted are proposed for board consideration as calculated by HECC staff. The board meeting is scheduled for May 17 and 18, 2023.				

**Process Notes**

The public universities are required under statute (ORS 352.025, 352.102 and 352.103) to use a tuition setting body (committee or workgroup) as part of an inclusive and transparent tuition-setting process. The tuition setting body must include a minimum of eight members with two administrators, two faculty, two students representing student government, and two students representing historically underserved students.

The table below notes the number of total members on each tuition setting body, as well as the number of student members. Each institution posts meeting materials and additional information on websites established for this purpose. The number of meetings held along with the number of student forums conducted is also noted in the table below.

	<b>Total Members</b>	<b>Student Members</b>	<b>Total Meetings</b>	<b>Student Forums</b>
EOU	14	4	7	2
OIT	17	8	4	2
OSU	18	5	10	7
PSU	27	16	7	1
SOU	8	4	7	0
UO	20	4	10	2
WOU	8	4	6	0**
<b>Minimum</b>	<b>8</b>	<b>4*</b>	<b>N/A</b>	
*Includes 2 students representing historically underserved students. There is no minimum required number of meetings or student forums.				
**WOU sent an online survey to get feedback from students.				

**Significant Observations**

Many of the public university governing boards offered clear guidance at the outset to affect affordability as best as possible by limiting increases. This guidance informed many of the tuition setting conversations. The guidance was slightly different at the various universities with some boards providing specific thresholds over which they would not consider an increase while some offered a suggested range for the committee’s consideration.

Overall, the process used at many of the universities looked similar to what had been occurring before the pandemic with in person meetings and engagement. Some of the universities reported having difficulty with student engagement at some events, possibly the result of clear

guidance from governing boards to limit increases or the result of more persistent engagement overall. The process for soliciting student feedback differs across campuses with examples including town hall presentations, student surveys, and scheduled meetings with different stakeholder groups.

It is also worth noting that fees, especially health fees, generally saw significant increases this year. The health fee, along with the building fee, are two common fees across all seven universities included in the calculation. The increase is likely due to a combination of increased costs for existing services and students' desires to provide more robust services (particularly related to mental health) on top of those already provided.

Another observation involves the connection between affordability and budget considerations. Continuing conversations are occurring at most of the universities about the long-term implications of structural budget deficits. Specifically, the interaction between revenues (i.e. stagnant or limited tuition/fee revenues) and ongoing cost increases (i.e. benefits costs and others outside institution control).

**Staff Recommendation:**

No action required, discussion only.

**Appendix A—Calculating the Annual Tuition and Mandatory Enrollment Fee Increase**

HECC staff will typically observe the tuition setting process. Due to ORS 352.102 (4)(a), the focus is on resident, undergraduate tuition and mandatory enrollment fees. Definitions, guidance and interpretation have been provided by the Oregon Department of Justice (DOJ) over time, and the tuition increase process and criteria are now in Oregon Administrative Rule, 715-013-0030.

The increase is calculated for each public university based on the initial recommendations made by the tuition setting body and then finalized after board approval. Where an institution has multiple campuses, the increases are calculated separately by campus, but the threshold is applied to the entire university using a weighted average approach. There are a few issues of note.

**Base Tuition.** For tuition, only base tuition is included in the calculation. This does not include differential tuition which typically applies to students in certain academic programs (i.e. engineering, health, etc.) or college (i.e. honors college). The calculation includes costs for the full-time enrollment of undergraduate, resident students only.

**Mandatory Enrollment Fees.** Generally, only those fees that are mandatory for all students to pay as a function of enrolling are included in the calculation. This does not include course specific fees or fees for service. The exception is incidental fees. Although they apply to all students, mandatory, incidental fees are those set by the student government association. They are not included by interpretation of DOJ.

<b>Example Calculation – One Cohort</b>		
	<b>Academic Year A</b>	<b>Academic Year B</b>
Tuition	\$188.25/hour * 45 hours = \$8,471.25	\$193/hour * 45 hours = \$8,685
Bldg/Tech Fee	\$39/term * 3 terms = \$117	\$39/term * 3 terms = \$117
Health Fee	\$168/term * 3 terms = \$504	\$176/term * 3 terms = \$528
Student Union Fee	\$44/term * 3 terms = \$132	\$44/term * 3 terms = \$132
<b>Total</b>	<b>\$9,224.25</b>	<b>\$9,462.00</b>
<b>Annual Increase</b>	<b>\$237.75 or 2.58%</b>	

**Student Cohorts.** A weighted average approach is applied when there are different increases for different groups of students. For example, the UO guaranteed tuition program and OSU's decision to charge different rates based on the year a student enrolled. The HECC does so pursuant to DOJ guidance recommending the HECC take a holistic approach to the review rather than basing the review entirely on whether or not any one tuition/fee cohort increased by more than 5%.

Since the implementation of the UO program in 2020, there are multiple cohorts of students including those who were grandfathered. The weighted average approach calculates the increase for each cohort and then averages it based proportionally on the size of the cohort relative to total enrollment. The exact calculations for 2022-23 are included in the appendix.

During the pandemic, OSU defined tuition increases for different groups of students starting with the 2020-21 academic year. They did not increase tuition for continuing students but increased it for new students. As a result, the weighted average approach was used.

Specifically, HECC staff undertake a four-step process:

1. Determine the rate of increase for each tuition and fee cohort.
2. Obtain the student FTE for each cohort to determine the relative proportion each represents.
3. Multiply the rate of increase for each cohort by the proportion of the overall FTE that each cohort represents to get the weighted increase for that cohort.
4. Add the weighted increases together to determine the total weighted average increase.

**Fee Determination.** To determine if a fee should be included in the calculation, HECC staff developed a fee determination tool for stakeholder use based on DOJ guidance. The yes/no answers to seven questions as outlined below help determine if the fee should be included:

1. Does the fee apply to all undergraduate resident students?
2. Is the fee authorized by a student referendum?
3. Is the referendum-approved fee a new fee?
4. Did the referendum authorize increases or changes in the fee without student government approval?
5. Is the fee one-time?
6. Is the fee formally requested by the student government (annually)?
7. Did the student government specify where the funds from the fee will be spent?

**Tuition and Fee Tracker - The Status of Tuition Setting**

Includes only those mandatory fees applicable to the 5% calculation

Institution	Academic Year 2022-23			Academic Year 2023-24			Variance, Totals		5% Trigger?
	Tuition	Mandatory Fees	Total	Tuition	Mandatory Fees	Total			
EOU	8,212.50	897.00	9,109.50	8,617.50	945.00	9,562.50	453.00	4.97%	No
OIT-WV	10,002.15	324.00	10,326.15	10,502.10	324.00	10,826.10	499.95	4.84%	
OIT-KF	10,002.15	720.00	10,722.15	10,502.10	720.00	11,222.10	499.95	4.66%	
<b>OIT Total</b>								<b>4.71%</b>	No
OSU-COR (Pre 20)	10,425.00	794.31	11,219.31	10,830.00	832.98	11,662.98	443.67	3.95%	
OSU-COR (20-21)	10,740.00	794.31	11,534.31	11,145.00	832.98	11,977.98	443.67	3.85%	
OSU-COR (21-22)	10,920.00	794.31	11,714.31	11,325.00	832.98	12,157.98	443.67	3.79%	
OSU-COR (22-23)	11,010.00	794.31	11,804.31	11,415.00	832.98	12,247.98	443.67	3.76%	
OSU-COR (23-24)	11,010.00	794.31	11,804.31	11,460.00	832.98	12,292.98	488.67	4.14%	
OSU-CC (Pre 20)	10,065.00	438.00	10,503.00	10,425.00	474.00	10,899.00	396.00	3.77%	
OSU-CC (20-21)	10,560.00	438.00	10,998.00	10,965.00	474.00	11,439.00	441.00	4.01%	
OSU-CC (21-22)	10,740.00	438.00	11,178.00	11,145.00	474.00	11,619.00	441.00	3.95%	
OSU-CC (22-23)	11,010.00	438.00	11,448.00	11,415.00	474.00	11,889.00	441.00	3.85%	
OSU-CC (23-24)	11,010.00	438.00	11,448.00	11,460.00	474.00	11,934.00	486.00	4.25%	
<b>OSU Total</b>								<b>3.89%</b>	No
PSU	9,000.00	837.00	9,837.00	9,315.00	873.00	10,188.00	351.00	3.57%	No
SOU	9,405.00	750.00	10,155.00	9,675.00	786.00	10,461.00	306.00	3.01%	No
UO Continuing	11,407.95	1,641.75	13,049.70	11,750.40	1,690.50	13,440.90	391.20	3.00%	
UO New Guaranteed	12,510.00	2,121.00	14,631.00	13,012.65	2,229.75	15,242.40	611.40	4.18%	
<b>UO Total</b>								<b>1.34%</b>	No
WOU	8,730.00	756.00	9,486.00	9,000.00	780.00	9,780.00	294.00	3.10%	No

**NOTES:**

**Tuition** Tuition is the base rate for resident, undergraduate tuition for 45 credits a year (15 credits for each of three terms)  
Does not include differential tuition or course-specific fees (lab fees, materials fees, etc.)

**Mandatory Fees** Fees are those mandatory fees for full-time students; does not include incidental fees set by Student Government that are also mandatory  
Does not include one-time fees (matriculation fee, etc.) or fees for services not charged to all students (library fines, etc.)

**Resident, Undergraduate Tuition and Mandatory Enrollment Fees**

Includes all mandatory enrollment fees

Institution	Academic Year 2022-23			Academic Year 2023-24			Variance, Totals	
	Tuition	All Mandatory Fees	Total	Tuition	All Mandatory Fees	Total		
EOU	8,212.50	1,983.00	10,195.50	8,617.50	2,091.00	10,708.50	513.00	5.03%
OIT-WV	10,002.15	564.00	10,566.15	10,502.10	609.00	11,111.10	544.95	5.16%
OIT-KF	10,002.15	2,203.50	12,205.65	10,502.10	2,194.50	12,696.60	490.95	4.02%
OSU-COR (Pre 20)	10,425.00	2,238.78	12,663.78	10,830.00	2,346.36	13,176.36	512.58	4.05%
OSU-COR (20-21)	10,740.00	2,238.78	12,978.78	11,145.00	2,346.36	13,491.36	512.58	3.95%
OSU-COR (21-22)	10,920.00	2,238.78	13,158.78	11,325.00	2,346.36	13,671.36	512.58	3.90%
OSU-COR (22-23)	11,010.00	2,238.78	13,248.78	11,415.00	2,346.36	13,761.36	512.58	3.87%
OSU-COR (23-24)	11,010.00	2,238.78	13,248.78	11,460.00	2,346.36	13,806.36	557.58	4.21%
OSU-CC (Pre 20)	10,065.00	1,563.00	11,628.00	10,425.00	1,629.00	12,054.00	426.00	3.66%
OSU-CC (20-21)	10,560.00	1,563.00	12,123.00	10,965.00	1,629.00	12,594.00	471.00	3.89%
OSU-CC (21-22)	10,740.00	1,563.00	12,303.00	11,145.00	1,629.00	12,774.00	471.00	3.83%
OSU-CC (22-23)	11,010.00	1,563.00	12,573.00	11,415.00	1,629.00	13,044.00	471.00	3.75%
OSU-CC (23-24)	11,010.00	1,563.00	12,573.00	11,460.00	1,629.00	13,089.00	516.00	4.10%
PSU	9,000.00	1,806.00	10,806.00	9,315.00	1,923.00	11,238.00	432.00	4.00%
SOU	9,405.00	2,289.00	11,694.00	9,675.00	2,418.00	12,093.00	399.00	3.41%
UO Continuing	11,407.95	2,464.50	13,872.45	11,750.40	2,533.50	14,283.90	411.45	2.97%
UO Guaranteed	12,510.00	2,541.75	15,051.75	13,012.65	2,654.25	15,666.90	615.15	4.09%
WOU	8,730.00	1,872.00	10,602.00	9,000.00	2,025.00	11,025.00	423.00	3.99%

**NOTES:**

**Tuition** Tuition is the base rate for resident, undergraduate tuition for 45 credits a year (15 credits for each of three terms)  
Does not include differential tuition or course-specific fees (lab fees, materials fees, etc.)

**Mandatory Fees** Includes all mandatory fees; some of which do not apply to the 5% threshold calculation  
Does not include one-time fees (matriculation fee, etc.) or fees for services not charged to all students (library fines, etc.)

**UO Guaranteed Tuition Program - Calculation of Increase for 2023-2024 Academic Year**

Undergraduate, Resident Tuition

<b>2022-23 Tuition and Fee Rates</b>	<b>Tuition per Credit</b>	<b>45 Credits</b>	<b>Fees per Term</b>	<b>Fees for Full Year</b>	<b>Total</b>
Continuing Students	\$253.51	\$11,407.95	\$547.25	\$1,641.75	\$13,049.70
Continuing Students (Guaranteed Tuition 2020)	\$254.62	\$11,457.90	\$527.67	\$1,583.01	\$13,040.91
Continuing Students (Guaranteed Tuition 2021)	\$266.08	\$11,973.60	\$547.50	\$1,642.50	\$13,616.10
New Students (Guaranteed Tuition 2022)*	\$278.05	\$12,512.25	\$707.00	\$2,121.00	\$14,633.25

\*Increase in fees per term is due to reassignment of Student Union Expenses from Incidental Fee.

<b>2023-24 Tuition and Fee Rates</b>	<b>Tuition per Credit</b>	<b>45 Credits</b>	<b>Fees per Term</b>	<b>Fees for Full Year</b>	<b>Total</b>
Continuing Students	\$261.12	\$11,750.40	\$563.50	\$1,690.50	\$13,440.90
Continuing Students (Guaranteed Tuition 2020)	\$254.62	\$11,457.90	\$527.67	\$1,583.01	\$13,040.91
Continuing Students (Guaranteed Tuition 2021)	\$266.08	\$11,973.60	\$547.50	\$1,642.50	\$13,616.10
Continuing Students (Guaranteed Tuition 2022)	\$278.05	\$12,512.25	\$707.00	\$2,121.00	\$14,633.25
New Students (Guaranteed Tuition 2023)	\$289.18	\$13,013.10	\$743.25	\$2,229.75	\$15,242.85

**Year over Year Change in %:**

	<b>Tuition</b>	<b>Fees</b>	<b>Total</b>
Continuing Students	3.00%	2.97%	3.00%
Continuing Students (Guaranteed Tuition 2020)	0.00%	0.00%	0.00%
Continuing Students (Guaranteed Tuition 2021)	0.00%	0.00%	0.00%
Continuing Students (Guaranteed Tuition 2022)	0.00%	0.00%	0.00%
New Students (Guaranteed Tuition 2023)	4.00%	5.13%	4.17%

<b>Calculation of Tuition/Fee Increase:</b>	<b>FY24 Est FTE</b>	<b>Proportion of</b>	<b>Weighted Increase</b>
	<b>Count</b>	<b>Total</b>	<b>%</b>
Continuing Students	528	5.3%	0.2%
Continuing Students (Guaranteed Tuition 2020)	1,586	15.9%	0.0%
Continuing Students (Guaranteed Tuition 2021)	2,245	22.4%	0.0%
Continuing Students (Guaranteed Tuition 2022)	2,803	28.0%	0.0%
New Students (Guaranteed Tuition 2023)	2,839	28.4%	1.2%
<b>TOTALS</b>	<b>10,001</b>	<b>100%</b>	<b>1.34%</b>



**OSU Corvallis Tuition - Calculation of Increase for 2023-24**

## Undergraduate, Resident Tuition

<b>2022-23 Tuition and Fee Rates</b>	<b>Tuition per Credit</b>	<b>45 Credits</b>	<b>Fees per Term</b>	<b>Fees for Full Year</b>	<b>Total</b>
19-20 Enrollees	225.00	10,425.00	264.77	794.31	11,219.31
20-21 Enrollees	232.00	10,740.00	264.77	794.31	11,534.31
21-22 Enrollees	236.00	10,920.00	264.77	794.31	11,714.31
22-23 Enrollees	238.00	11,010.00	264.77	794.31	11,804.31

<b>2023-24 Tuition and Fee Rates</b>	<b>Tuition per Credit</b>	<b>45 Credits</b>	<b>Fees per Term</b>	<b>Fees for Full Year</b>	<b>Total</b>
19-20 Enrollees	234.00	10,830.00	277.66	832.98	11,662.98
20-21 Enrollees	241.00	11,145.00	277.66	832.98	11,977.98
21-22 Enrollees	245.00	11,325.00	277.66	832.98	12,157.98
22-23 Enrollees	247.00	11,415.00	277.66	832.98	12,247.98
23-24 Enrollees	248.00	11,460.00	277.66	832.98	12,292.98

<b>Year over Year Change in %:</b>	<b>Tuition</b>	<b>Fees</b>	<b>Total</b>
Pre 19-20 Enrollees	3.88%	4.87%	3.95%
20-21 Enrollees	3.77%	4.87%	3.85%
21-22 Enrollees	3.71%	4.87%	3.79%
22-23 Enrollees	3.68%	4.87%	3.76%
23-24 Enrollees	4.09%	4.87%	4.14%

<b>Calculation of Tuition/Fee Increase:</b>	<b>FY24 Est FTE Count</b>	<b>Proportion of Total</b>	<b>Weighted Increase %</b>
Pre 19-20 Enrollees	161	1.1%	0.0%
20-21 Enrollees	3,491	23.8%	0.9%
21-22 Enrollees	3,623	24.7%	0.9%
22-23 Enrollees	3,682	25.1%	0.9%
23-24 Enrollees	3,712	25.3%	1.0%
<b>TOTALS</b>	<b>14,669</b>	<b>100%</b>	<b>2.84%</b>

**OSU Cascades Tuition - Calculation of Tuition/Fee Increase for 2023-24**

## Undergraduate, Resident Tuition

<b>2022-23 Tuition and Fee Rates</b>	<b>Tuition per Credit</b>	<b>45 Credits</b>	<b>Fees per Term</b>	<b>Fees for Full Year</b>	<b>Total</b>
19-20 Enrollees	217.00	10,065.00	146.00	438.00	10,503.00
20-21 Enrollees	228.00	10,560.00	146.00	438.00	10,998.00
21-22 Enrollees	232.00	10,740.00	146.00	438.00	11,178.00
22-23 Enrollees	238.00	11,010.00	146.00	438.00	11,448.00

<b>2023-24 Tuition and Fee Rates</b>	<b>Tuition per Credit</b>	<b>45 Credits</b>	<b>Fees per Term</b>	<b>Fees for Full Year</b>	<b>Total</b>
19-20 Enrollees	225.00	10,425.00	158.00	474.00	10,899.00
20-21 Enrollees	237.00	10,965.00	158.00	474.00	11,439.00
21-22 Enrollees	241.00	11,145.00	158.00	474.00	11,619.00
22-23 Enrollees	247.00	11,415.00	158.00	474.00	11,889.00
23-24 Enrollees	248.00	11,460.00	158.00	474.00	11,934.00

<b>Year over Year Change in %:</b>	<b>Tuition</b>	<b>Fees*</b>	<b>Total</b>
Pre 19-20 Enrollees	3.58%	8.22%	3.77%
20-21 Enrollees	3.84%	8.22%	4.01%
21-22 Enrollees	3.77%	8.22%	3.95%
22-23 Enrollees	3.68%	8.22%	3.85%
23-24 Enrollees	4.09%	8.22%	4.25%

<b>Calculation of Tuition/Fee Increase:</b>	<b>FY24 Est FTE</b>		<b>Weighted Increase</b>
	<b>Count</b>	<b>Proportion of Total</b>	<b>%</b>
Pre 19-20 Enrollees	49	5.4%	0.2%
20-21 Enrollees	190	20.9%	0.8%
21-22 Enrollees	218	24.0%	0.9%
22-23 Enrollees	224	24.7%	1.0%
23-24 Enrollees	226	24.9%	1.1%
<b>TOTALS</b>	<b>907</b>	<b>100%</b>	<b>2.94%</b>

\*OSU moved to align new undergraduate tuition/fees between the campuses. This resulted in a higher increase for the Cascades campus.

**OSU Combined - Calculation of Tuition/Fee Increase for 2023-24**

Undergraduate, Resident Tuition

<b>Calculation of Tuition/Fee Increase:</b>	<b>Annual Change</b>	<b>23-24 Est FTE Count</b>	<b>Proportion of Total</b>	<b>Weighted Increase %</b>
19-20 Enrollees - Corvallis	3.95%	161	1.03%	0.04%
20-21 Enrollees	3.85%	3,491	22.41%	0.86%
21-22 Enrollees	3.79%	3,623	23.26%	0.88%
22-23 Enrollees	3.76%	3,682	23.64%	0.89%
23-24 Enrollees	4.14%	3,712	23.83%	0.99%
19-20 Enrollees - Cascades	3.77%	49	0.31%	0.01%
20-21 Enrollees	4.01%	190	1.22%	0.05%
21-22 Enrollees	3.95%	218	1.40%	0.06%
22-23 Enrollees	3.85%	224	1.44%	0.06%
23-24 Enrollees	4.25%	226	1.45%	0.06%
<b>TOTALS</b>		<b>15,576</b>	<b>100.00%</b>	<b>3.89%</b>

**OIT Combined Tuition - Calculation of Tuition/Fee Increase for 2023-24**

## Undergraduate, Resident Tuition

<b>2022-23 Tuition and Fee Rates</b>	<b>Tuition per Credit</b>	<b>45 Credits</b>	<b>Fees per Term</b>	<b>Fees for Full Year</b>	<b>Total</b>
OIT-KF	222.27	10,002.15	240.00	720.00	10,722.15
OIT-WV	222.27	10,002.15	108.00	324.00	10,326.15

<b>2023-24 Tuition and Fee Rates</b>	<b>Tuition per Credit</b>	<b>45 Credits</b>	<b>Fees per Term</b>	<b>Fees for Full Year</b>	<b>Total</b>
OIT-KF	233.38	10,502.10	240.00	720.00	11,222.10
OIT-WV	233.38	10,502.10	108.00	324.00	10,826.10

<b>Year over Year Change in %:</b>	<b>Tuition</b>	<b>Fees</b>	<b>Total</b>
OIT-KF	5.00%	0.00%	4.66%
OIT-WV	5.00%	0.00%	4.84%

<b>Calculation of Tuition/Fee Increase:</b>	<b>FY23 Actual FTE Count</b>	<b>Proportion of Total</b>	<b>Weighted Increase %</b>
OIT-KF	1,187	76.0%	3.5%
OIT-WV	375	24.0%	1.2%
<b>TOTALS</b>	<b>1,562</b>	<b>100%</b>	<b>4.71%</b>