

# 2024 UNIVERSITY EVALUATION: University of Oregon (ORS 352.061)



Source: University of Oregon

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# INTRODUCTION

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This evaluation is guided by Oregon Revised Statute (ORS) 352.061, which mandates that the Higher Education Coordinating Commission (HECC) submit a biennial evaluation of public universities listed in ORS 352.002 to the Oregon Legislative Assembly. The purpose of this report is to assess each university's contributions to the state's higher education goals as outlined in state statutes, as well as in the HECC's Strategic Plan and the Roadmap for Oregon Postsecondary Education and Training.

These evaluation focuses on key areas of student success, access and affordability, academic quality, and financial sustainability, while also addressing the universities' roles in regional development and community engagement. This report builds on previous evaluations and provides an updated analysis of the universities' progress in meeting the objectives of Oregon's higher education system.

Each university's evaluation is based on a combination of accreditation reports, self-assessments, and both state and federal data. As part of this evaluation, the report highlights the individual strengths, challenges, and initiatives of the universities in fulfilling their missions and meeting state objectives, including efforts to increase degree completion rates, expand access for underrepresented students, and foster academic excellence.

Additionally, each report includes an assessment of the university's Board of Trustees and their role in ensuring transparency, public accountability, and alignment with the State's higher education mission. The findings presented here will help guide ongoing efforts to improve Oregon's higher education system, with an emphasis on supporting institutions as they work to enhance student outcomes and contribute to the economic vitality and cultural enrichment of the state.

Passed by the Oregon Legislature in 2013, Senate Bill 270 established individual governing boards at the University of Oregon (UO) and Portland State University (PSU). The bill also set a timeline for Oregon State University (OSU) to establish its own governing board, which was subsequently implemented.

House Bill 4018 (2014) and Senate Bill 80 (2015) authorized the creation of independent governing boards at:

- Western Oregon University (WOU)
- Southern Oregon University (SOU)
- Oregon Institute of Technology (OIT)
- Eastern Oregon University (EOU)

These actions led to the dissolution of the Oregon University System. SB 270 and subsequent legislation required the Higher Education Coordinating Commission (HECC) to conduct regular evaluations of the public universities. In 2017, the legislature amended ORS 352.061, mandating HECC to evaluate each public university once every two years. The evaluation criteria are codified in ORS 352.061.

ORS 352.061(2) outlines the specific components to be included in each evaluation:

- a) A report on the university's achievement of outcomes, measures of progress, goals, and targets.
- b) An assessment of the university's progress toward achieving the mission of all education beyond high school, as described in ORS 350.014 (the "40-40-20" goal).

Additionally, ORS 352.061(2)(c) mandates the HECC to assess university governing boards against the standards set forth in ORS 352.025, which includes the following provisions:

- a) Provide transparency, public accountability, and support for the university.
- b) Are focused closely on the individual university.
- c) Do not negatively impact public universities that do not have governing boards.

- d) Lead to greater access and affordability for Oregon residents without disadvantaging Oregon students compared to out-of-state students.
- e) Act in the best interests of both the university and the State of Oregon.
- f) Promote the academic success of students in alignment with the mission of all education beyond high school, as outlined in ORS 350.014 (the “40-40-20” goal).

For context, ORS 352.025 includes additional legislative findings:

- a) Even with universities having governing boards, there are benefits to a coordinated university system through economies of scale.
- b) Services may continue to be shared among universities, even with individual governing boards.
- c) Legal title to all real property, whether acquired before or after the creation of a governing board, through state funding, revenue bonds, or philanthropy, is held in the name of the State of Oregon, through the governing board.
- d) The Legislative Assembly has a responsibility to monitor the success of governing boards in fulfilling their missions, compacts, and the principles outlined in this section.

This year, the HECC evaluated:

- University of Oregon (UO)
- Portland State University (PSU)
- Oregon State University (OSU)

## **EVALUATION PROCESS**

The Higher Education Coordinating Commission (HECC) initiated a collaborative workgroup including university provosts, the Inter-Institutional Faculty Senate, staff from the Oregon Education Investment Board, HECC staff, and faculty from across Oregon’s public universities. The workgroup began its efforts in February 2015 to establish a clear understanding of the purpose, scope, and structure of the evaluation process. This led to the development of an evaluation framework that could evolve to meet the needs of both the universities and the state. After incorporating feedback from stakeholders, the HECC formally adopted the framework on September 10, 2015.

The HECC’s approach to evaluating Oregon’s public universities is designed to be responsive and adaptable to the unique circumstances of each institution. Rather than adhering to a rigid or formulaic process, the evaluation considers factors such as changes in state funding, student demographics, and the universities’ strategic goals. By integrating a variety of data sources—including self-studies, accreditation reports, and input from university boards of trustees—the HECC aims to provide a nuanced, holistic perspective on each university’s contributions to the state’s higher education objectives.

This evaluation is not a comprehensive review of all aspects of each university but focuses on key legislative priorities, including student success, access and affordability, and financial sustainability. The findings from this evaluation provide insights that support policy development and ensure that Oregon’s higher education institutions remain responsive to both state needs and student outcomes.

## **STATEWIDE CONTEXT**

### **Funding History**

In the wake of the Great Recession (2008-2012), state funding for public universities in Oregon experienced a significant decline, the effects of which are still felt today. Although recent state investments in higher education have returned to pre-recession levels, they are tempered by growing debt obligations tied to state-funded capital projects. As a result, these funding levels have not kept pace with the increasing demands placed on public universities. With an increasingly diverse student body and a focus on raising graduation and completion rates, additional funding is essential to ensure that institutions have the resources they need to support student success and meet the evolving educational needs of the state.

### **Governance Changes**

Senate Bill 270 (2013) established the benefits of having independent governing boards for public universities, emphasizing that these boards should be transparent, closely aligned with the university's mission, and "act in the best interest of both the university and the State of Oregon as a whole." The Legislature also recognized the value of economies of scale, allowing universities to continue participating in shared service models, which promote efficiency and reduce costs.

It is important to note that under ORS 352.129, public universities were initially required to participate in group health insurance, a select set of retirement plans, and collective bargaining through July 1, 2019. Following this date, universities were no longer mandated to offer the same scope or value for these employee benefits. However, they are still required to maintain participation in shared administrative services for the provision of benefits, as further detailed in the "Shared Administrative Services" section of this report.

### **Local Conditions and Mission**

#### **MISSION:**

The University of Oregon (UO) is a comprehensive public research university committed to exceptional teaching, discovery, and service. We work at a human scale to generate big ideas. As a community of scholars, we help individuals question critically, think logically, reason effectively, communicate clearly, act creatively, and live ethically.

#### **PURPOSE:**

We strive for excellence in teaching, research, artistic expression, and the generation, dissemination, preservation, and application of knowledge. We are devoted to educating the whole person, and to fostering the next generation of transformational leaders and informed participants in the global community. Through these pursuits, we enhance the social, cultural, physical, and economic wellbeing of our students, Oregon, the nation, and the world.

#### **VISION:**

We aspire to be a preeminent and innovative public research university encompassing the humanities and arts, the natural and social sciences, and the professions. We seek to enrich the human condition through collaboration, teaching, mentoring, scholarship, experiential learning, creative inquiry, scientific discovery, outreach, and public service.

## VALUES:

We value the passions, aspirations, individuality, and success of the students, faculty, and staff who work and learn here. We value academic freedom, creative expression, and intellectual discourse. We value our diversity and seek to foster equity and inclusion in a welcoming, safe, and respectful community. We value the unique geography, history and culture of Oregon that shapes our identity and spirit. We value our shared charge to steward resources sustainably and responsibly.

In service of its mission, UO President Karl Scholz launched a campus-wide strategic planning process upon his arrival in 2023. That process resulted in the strategic plan, Oregon Rising, which is focused on:

- Timely Graduation
- Career Preparation
- A Flourishing Community
- Accelerating Impact on the World

Workgroups began operationalizing the plan in AY 2024-25.

# ACCREDITATION

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A comprehensive assessment and review of academic and institutional quality is available from the Northwest Commission on Colleges and Universities (NWCCU) that accredits UO and other universities in Oregon. Accreditation of an institution of higher education by the NWCCU indicates that it meets or exceeds criteria for the assessment of institutional quality evaluated through a peer review process. An accredited college or university is one that has the necessary resources to achieve its stated purposes through appropriate educational programs, is substantially doing so, and gives reasonable evidence that it will continue to do so in the foreseeable future. Institutional integrity is also addressed through accreditation. Reviews are structured as a cyclical process of continuous improvement. NWCCU accreditation occurs on a seven-year cycle that consists of four parts: Annual Reports each year; Mid-Cycle self-review and peer review in the third year; Policies, Regulations, and Financial Review in sixth year; and Evaluation of Institutional Effectiveness self-review and peer review in the seventh year. This section draws on relevant parts of NWCCU reports that are identified as of interest to the Legislature and in alignment with the HECC Strategic Plan.

The University of Oregon was last reaffirmed for accreditation in March 2025 through 2031 following the completion of its Year six Policies, Regulations and Financial Review in Spring 2023, Year seven report, and subsequent NWCCU evaluation. The Year seven peer evaluation successfully addressed ten standards recommended for improvement from the Year six PRFR review. A copy of the reaffirmation letter with NWCCU recommendations is posted on the university's website.

Their next evaluation will be in Fall 2027 for the Mid-Cycle Review.

Specialized Accredited Programs at UO are listed here: <https://provost.uoregon.edu/specialized-accreditation>

## STUDENT ACCESS AND SUCCESS

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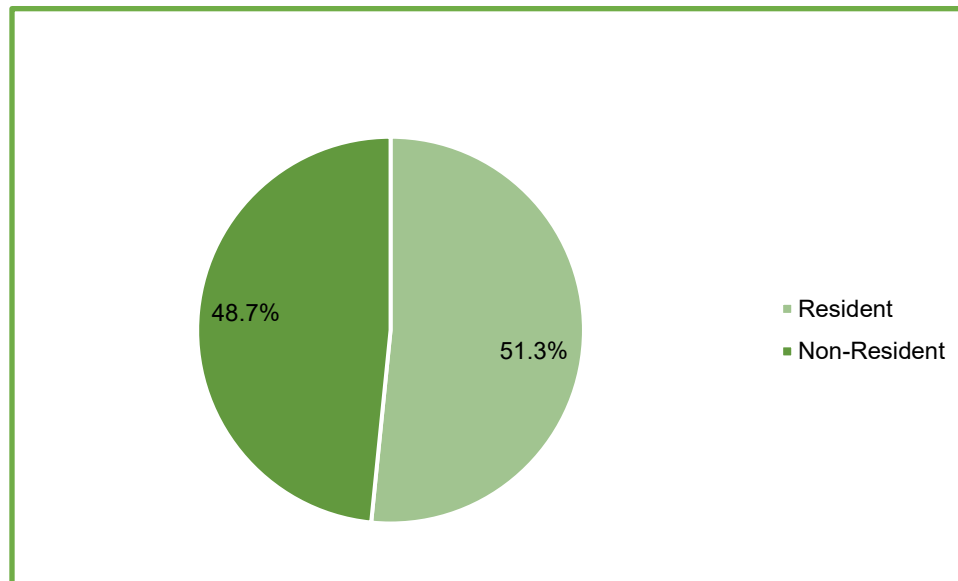
Nationally, undergraduate enrollment increased by 4.7 percent in fall 2024, marking a rebound above pre-pandemic levels, as reported by the National Student Clearinghouse Research Center. In Oregon, public universities continued their positive trajectory, with overall enrollment rising by 1.7 percent from fall 2023 to fall 2024, reflecting growth across the state.

This section of the report is focused on tracking trends in enrollment, completion outcomes, and demographic changes.

As described by Figures 2 and 3, a majority of UO students during the 2023-24 academic year (51.3 percent) were resident, and most (91.9 percent) attended full-time.

UO has continued to see enrollment growth since its last evaluation, with total enrollment rising by 2.6 percent from fall 2023 to fall 2024, increasing from 23,834 to 24,462 students. Resident enrollment grew by 3.7 percent, increasing from 12,221 to 12,676 students, while non-resident enrollment increased by 1.5 percent, rising from 11,613 to 11,786 students during the same period. Additionally, UO's Full-Time Equivalent (FTE) enrollment has continued its upward trend.

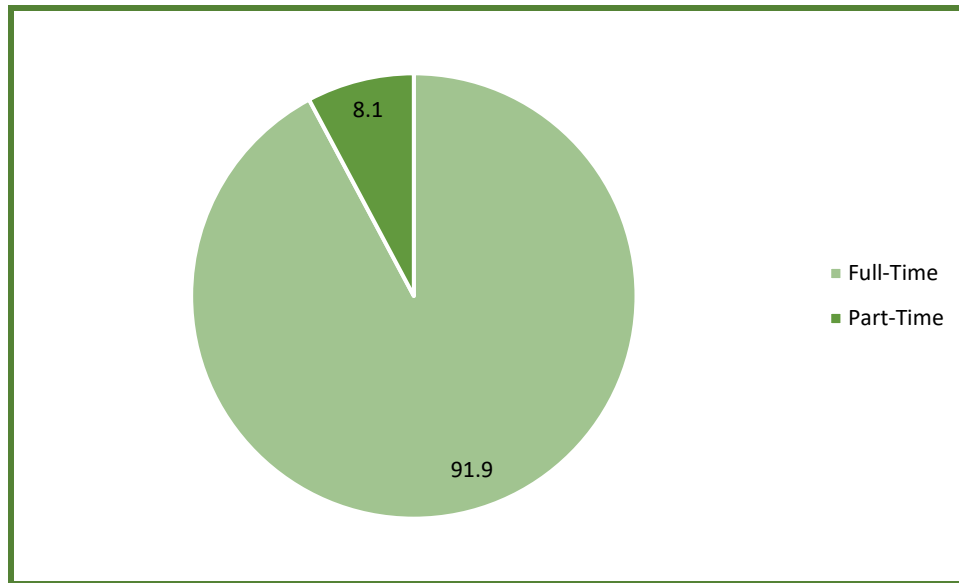
**Figure 1: UO Student Enrollment by Residency, Fall 2023-24**



Source: HECC (2025)



**Figure 2: UO Student Enrollment by Full-Time/Part-Time Status, fall 2023-24**



Source: HECC (2025)

The number of newly admitted undergraduate UO students has continued to grow, with an increase of 2.6 percent in total enrollment from fall 2023 to fall 2024, rising from 23,834 to 24,462 students. This growth reflects increases in both resident and non-resident students, with non-resident enrollment rising by 4.1 percent and resident enrollment increasing by 1.7 percent.

UO students come from diverse backgrounds. In fall 2024, 23.6 percent of UO's total enrollment came from underrepresented student populations.

**Table 1: UO 4<sup>th</sup> Week Headcount Enrollment by Race/Ethnicity**

| Race/<br>Ethnicity                | Fall 2021 | Fall 2022 | Fall 2023 | Fall 2024 | Change Fall<br>2023 to Fall<br>2024 |
|-----------------------------------|-----------|-----------|-----------|-----------|-------------------------------------|
| Non-Resident Alien                | 1,097     | 1,022     | 922       | 857       | -65                                 |
| American Indian/<br>Alaska Native | 137       | 113       | 133       | 137       | 4                                   |
| Asian                             | 1,471     | 1,538     | 1,588     | 1,648     | 60                                  |
| Black Non-Hispanic                | 571       | 612       | 633       | 715       | 82                                  |

| <b>Race/<br/>Ethnicity</b>   | <b>Fall 2021</b> | <b>Fall 2022</b> | <b>Fall 2023</b> | <b>Fall 2024</b> | <b>Change Fall<br/>2023 to Fall<br/>2024</b> |
|--|------------------|------------------|------------------|------------------|--|
| <b>Hispanic</b>  | 3,101            | 3,347            | 3,564            | 3,880            | 316  |
| <b>Pacific<br/>Islander</b>  | 98               | 99               | 84               | 84               | 0  |
| <b>Two or<br/>more races,<br/>Underrepre<br/>sented<br/>Minorities</b>         | 867              | 881              | 921              | 959              | 38   |
| <b>Two or<br/>more races,<br/>not<br/>Underrepre<br/>sented<br/>Minorities</b> | 885              | 1004             | 1,137            | 1,219            | 82   |
| <b>White Non-<br/>Hispanic</b>   | 13,620           | 14,212           | 14,540           | 14,691           | 151  |
| <b>Unknown</b>   | 451              | 374              | 312              | 272              | -40  |

Source: HECC (2025)

Underrepresented minority students at the University of Oregon (UO) graduated at rates lower than the overall student population, with a four-year graduation rate of 50.9 percent and a six-year graduation rate of 63.3 percent, compared to 60.0 percent and 72.8 percent for all students, respectively. Pell Grant recipients also experienced lower graduation rates, with a four-year graduation rate of 53.9 percent and a six-year graduation rate of 67.5 percent, compared to the overall student population.

The four and six-year graduation rate for UO first time freshmen who entered in the fall term of 2017 is as follows:

**Table 2: Four-Year and Six-Year Graduation Rate, First Time, Full Time Freshmen Entering fall 2017**

|  | <b>Four-Year Graduation<br/>Rate</b> | <b>Six-Year Graduation Rate</b> |
|--|--------------------------------------|---------------------------------|
| <b>All Students</b>                    | 60.0%                                | 72.8%                           |
| <b>Underrepresented<br/>Minorities</b> | 50.9%                                | 63.3%                           |
| <b>Pell Grant Recipients</b>           | 53.9%                                | 67.5%                           |

Source: HECC (2025)

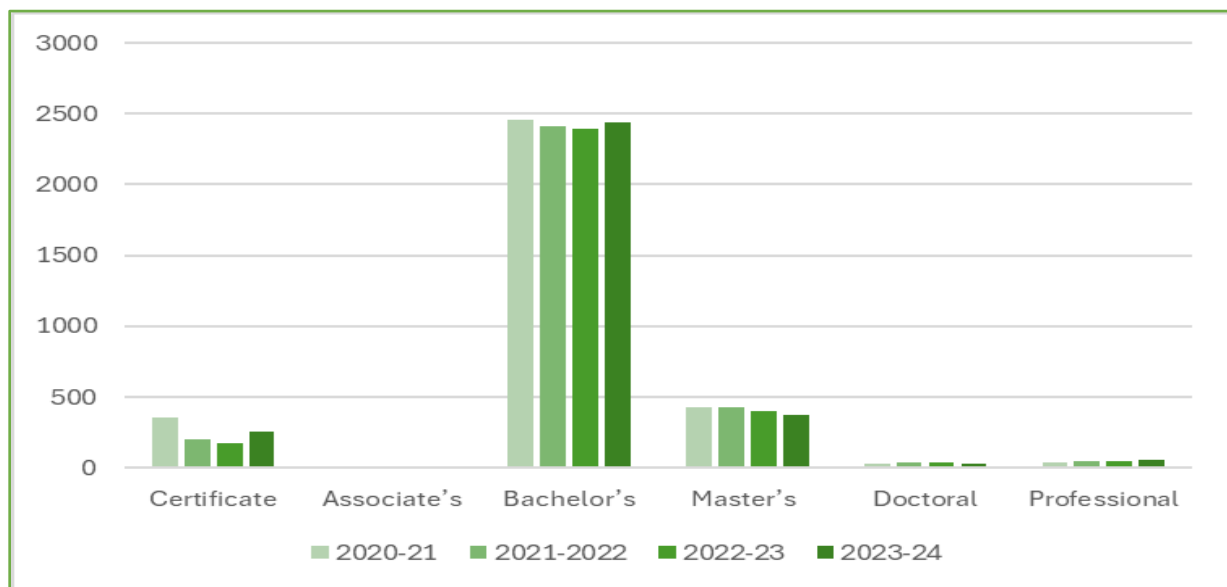
**Table 3: UO Resident Student Completions by Award Type**

|                     | 2020-21 | 2021-2022 | 2022-23 | 2023-24 |
|---------------------|---------|-----------|---------|---------|
| <b>Certificate</b>  | 357     | 206       | 179     | 254     |
| <b>Associate's</b>  | -       | -         | -       | -       |
| <b>Bachelor's</b>   | 2458    | 2410      | 2,395   | 2,442   |
| <b>Master's</b>     | 432     | 429       | 398     | 377     |
| <b>Doctoral</b>     | 31      | 37        | 35      | 34      |
| <b>Professional</b> | 43      | 52        | 49      | 57      |

Source: HECC (2025)

Over the past four academic years, the University of Oregon (UO) has continued to see steady completion trends across various degree types. The number of bachelor's degrees awarded to resident students remained consistent, increasing from 2,395 in 2022-23 to 2,442 in 2023-24. However, master's degree completions have seen a slight decrease, from 398 in 2022-23 to 377 in 2023-24.

**Figure 2: UO Resident Student Completions by Award Type**



Source: HECC (2025)

**Table 5: UO Completions by Race/Ethnicity**

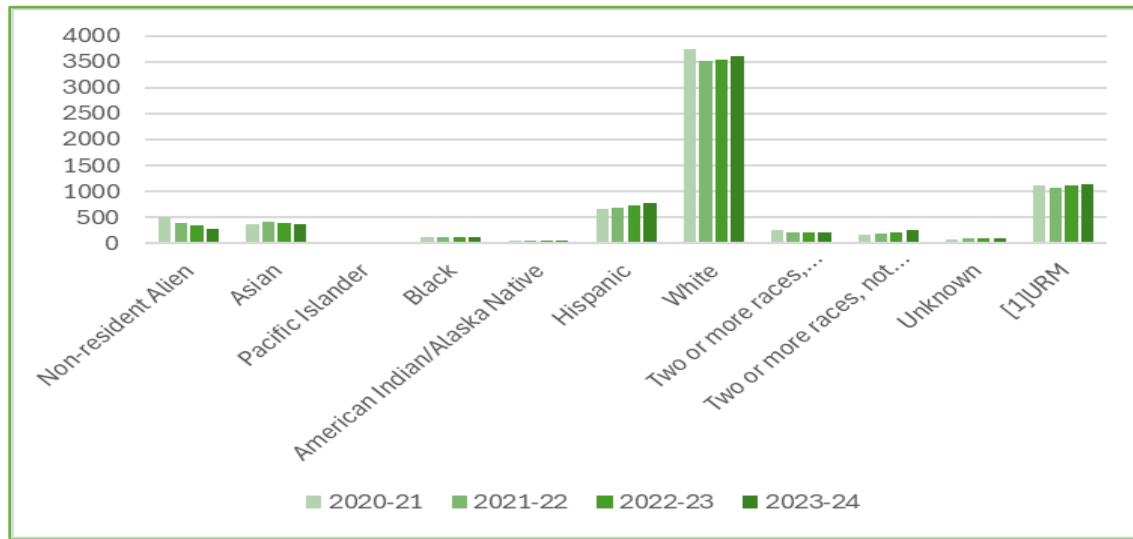
|   | <b>2020-21</b> | <b>2021-22</b> | <b>2022-23</b> | <b>2023-24</b> |
|---|----------------|----------------|----------------|----------------|
| <b>Non-resident Alien</b>                                 | 502            | 385            | 350            | 276            |
| <b>Asian</b>  | 375            | 403            | 400            | 366            |
| <b>Pacific Islander</b>                                   | 25             | 16             | 23             | 15             |
| <b>Black</b>  | 128            | 123            | 112            | 117            |
| <b>American Indian/Alaska Native</b>                      | 51             | 43             | 39             | 40             |
| <b>Hispanic</b>   | 671            | 682            | 724            | 770            |
| <b>White</b>  | 3,739          | 3,513          | 3,542          | 3,617          |
| <b>Two or more races, Underrepresented Minorities</b>     | 243            | 202            | 208            | 203            |
| <b>Two or more races, not Underrepresented Minorities</b> | 168            | 187            | 202            | 260            |
| <b>Unknown</b>  | 79             | 93             | 88             | 98             |

|                  | 2020-21 | 2021-22 | 2022-23 | 2023-24 |
|------------------|---------|---------|---------|---------|
| <sup>1</sup> URM | 1,118   | 1,066   | 1,106   | 1,145   |

Source: HECC (2025)

The share of degrees awarded to underrepresented minorities (URM) has been rising. In 2023-24, the number of degrees conferred to URM students reached 1,145, up from 1,106 in 2022-23. This increase underscores UO's ongoing commitment to promoting diversity and equity within its student body. Hispanic students have seen notable growth in degree completions, with a steady rise from 671 in 2020-21 to 770 in 2023-24, reflecting UO's efforts to support and graduate students from diverse racial and ethnic backgrounds.

**Figure 3: UO Completions by Race/Ethnicity**



Source: HECC (2025)

<sup>1</sup> URM (Under-Represented Minority Students: including Pacific Islander, Black, American Indian/Alaska Native, Hispanic, and students who identify as two or more under-represented minorities).

## AFFORDABILITY

Affordability, more specifically the affordability rate, is a key performance measure used in tracking the factors that contribute to student attainment and equity in alignment with Oregon's higher education goals. As a result, it is a consideration in the university evaluation process. This section includes a discussion of student costs and provides information on the affordability rate over time.

Tuition and fee rates can vary based on several factors including a student's academic year (or cohort), declared major, and residency. The governing boards have authority to set tuition and fee rates; however, they must seek HECC approval for any annual increase of greater than five percent for undergraduate, resident tuition and mandatory fees. Tuition and fee setting is complex with ORS 352.103 laying out requirements for an annual process at each university which requires staff and student participation.

Table A shows the trend in undergraduate, resident tuition and mandatory fees for the past decade unadjusted for inflation. This is for full-time, entering students taking 45 credits over three terms in a given academic year. All incidental fees are included. The information is for the main campus only and for the entering (or freshman) cohort as applicable. Differential tuition and course fees are not included. The average annual increase across all Oregon public universities over this period is 4.5 percent, with an average annual increase of 5.2 percent for UO, compared to inflation of 3.1 percent.

**Table A: Undergraduate, Resident Tuition and Mandatory Fees  
(First-time, full-time enrollment, unadjusted for inflation)**

|                  | Academic Year<br>2014-15 | Academic Year<br>2023-24 | Variance |     | Annual<br>Growth Rate |
|------------------|--------------------------|--------------------------|----------|-----|-----------------------|
| <b>UO</b>        | \$9,918                  | \$15,667                 | \$5,749  | 58% | 5.2%                  |
| <b>Statewide</b> | \$8,391                  | \$12,433                 | \$4,041  | 48% | 4.5%                  |

**Source: Data is collected from the universities and calculated by HECC staff. Main campus only. Entering cohort only. Incidental mandatory fees are included.**

Universities establish a total cost of attendance, or sticker price, which includes tuition and fees, books and supplies, room and board, and personal expenses. During 2022-23, tuition and related fees made up 42 percent of the total cost of attendance on average. Table B shows the change in the total cost of attendance for full-time students over the past decade unadjusted for inflation. The average annual increase across all Oregon public universities over this period is 3.0 percent, with an average annual increase of 3.8 percent for UO.

**Table B: Total Cost of Attendance  
(Full-time, unadjusted for inflation)**

|                  | Academic Year<br>2013-14 | Academic Year<br>2022-23 | Variance |     | Annual<br>Growth Rate |
|------------------|--------------------------|--------------------------|----------|-----|-----------------------|
| <b>UO</b>        | \$23,965                 | \$33,639                 | \$9,674  | 40% | 3.8%                  |
| <b>Statewide</b> | \$23,481                 | \$30,630                 | \$7,149  | 30% | 3.0%                  |

**Source: Public University Data Dashboard as published by the HECC Office of Research and Data. Noted as estimated cost of attendance for full-time.**

For most students, the total cost of attendance may be partially offset by financial aid including institution remissions and waivers. As a result, most students pay less than the sticker price. Table C shows the change

in the average net price for full-time students after accounting for public financial aid and institutional aid. The average annual increase across all Oregon public universities over this period was 2.9 percent, with a rate of 3.9 percent for UO, which is greater than the rate of inflation.

**Table C: Average Net Price  
(Full-time, unadjusted for inflation)**

|                  | <b>Academic Year<br/>2013-14</b> | <b>Academic Year<br/>2022-23</b> | <b>Variance</b> |     | <b>Annual<br/>Growth Rate</b> |
|------------------|----------------------------------|----------------------------------|-----------------|-----|-------------------------------|
| <b>UO</b>        | \$16,270                         | \$22,867                         | \$6,597         | 41% | 3.9%                          |
| <b>Statewide</b> | \$14,360                         | \$18,565                         | \$4,205         | 29% | 2.9%                          |

**Source: Public University Data Dashboard as published by the HECC Office of Research and Data.  
Noted as estimated cost of attendance after institutional aid.**

This data also suggests the average discount to the total cost of attendance has grown slightly over time for all public universities from 38.8 percent to 39.4 percent during 2022-23. However, the average discount rate for UO stayed roughly the same from 32.1 percent in 2013-24 to 32.0 percent during 2022-23.

The affordability rate is defined as the percentage of students, overall and by race/ethnicity, whose expected costs are greater than their expected resources. A higher number, therefore, indicates *lesser* affordability. It is measured by comparing the cost of attendance at a college or university with the expected financial resources available for each student including financial aid, the family's contribution, and an estimate of the student's earnings while enrolled. The cost of attendance data comes from the universities and includes estimates for the average, full-time student for tuition and fees, housing, books, supplies, transportation, and personal expenses. The cost of attendance does not include expenses that some students will face such as the cost of caring for children or other family members, health issues, and unexpected events.

**Table D: Trend in Affordability Rate**

|                | <b>Statewide</b> | <b>UO</b> |
|----------------|------------------|-----------|
| <b>2013-14</b> | 64%              | 60%       |
| <b>2014-15</b> | 63%              | 60%       |
| <b>2015-16</b> | 62%              | 59%       |
| <b>2016-17</b> | 61%              | 58%       |
| <b>2017-18</b> | 61%              | 59%       |
| <b>2018-19</b> | 60%              | 57%       |
| <b>2019-20</b> | 57%              | 54%       |
| <b>2020-21</b> | 54%              | 52%       |
| <b>2021-22</b> | 47%              | 44%       |
| <b>2022-23</b> | 50%              | 50%       |

**Source: Public University Data Dashboard as published by the HECC Office of Research and Data.**

Table D includes the trend in the overall affordability rate for all seven public universities and UO specifically. This data comes from the Public University Data Dashboard available on the HECC's website. Within the dashboard, the affordability rate can be further explored by race/ethnicity, Pell recipient status, geographic origin (urban, rural, mixed), and gender. Over time, the affordability rate has improved in part due to increased public financial aid and increased institutional aid. However, slightly more students faced unaffordable costs in 2022-23 compared to the prior year likely due to the ending of some expanded federal supports during the pandemic.

## ACADEMIC QUALITY AND RESEARCH

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The HECC relies on four key areas to track academic quality and research at each institution: regular external accreditation reviews to assess each institution's progress in meeting its stated mission, vision and goals; evidence of regular academic program review to improve quality; regular faculty evaluation and opportunities for professional development; and institutional reports of research activity evidenced by research expenditures. Research contributions are also reflected in economic impact and collaborations both discussed elsewhere in this report.

The University of Oregon has a long-established record of academic excellence. In 1969, it was admitted to the Association of American Universities (AAU), an organization of leading research universities devoted to maintaining a strong system of academic research and education. The University of Oregon is among 65 AAU universities, both public and private, and one of just two in the Pacific Northwest. The University of Oregon is among the 131 U.S. universities categorized in the top-tier designation of "Doctoral/Very High Research Activity" in the most recent Carnegie Classification of Institutions of Higher Education. For FY20 and FY21, UO reported total research expenditures of \$137.4 million and \$153 million, respectively.

UO's Clark Honors College was the first four-year public honors college west of the Mississippi. The university's academic programs are organized into eight degree-granting schools and colleges: The College of Design, College of Arts and Sciences, College of Education, School of Law, Lundquist College of Business, School of Journalism and Communication, School of Music and Dance, and Graduate School. The University of Oregon is particularly strong in the sciences (biology, chemistry, math, physics and geoscience), along with the neurosciences, cognitive sciences, anthropology, geography, materials, education and education research, sustainable architecture, journalism, entrepreneurship and sports business, environmental law, and East Asian languages and literatures. The university is well known for interdisciplinary programs such as environmental studies and comparative literature.

Program review is essential to maintain and improve program quality. The University of Oregon's processes for academic program review and approval are clearly established. Any significant change in the University's academic programs as defined by the HECC is approved by the Board upon recommendation by the committee responsible for academic affairs prior to the submission to the Commission. Internal program approval processes are managed by the Office of the Provost and posted at: <https://provost.uoregon.edu/new-revised-programs>. The Office of the Provost manages program review processes. Information on program review is available online at: <https://provost.uoregon.edu/program-review>.

Faculty evaluation and professional development are fundamental to sustaining academic quality. The University of Oregon has distinct processes for evaluation and promotion for "tenure-track faculty" (TTF) and "non-tenure track faculty" (NTTF) and has a Professional Development and Training Policy (<https://policies.uoregon.edu/vol-3-administration-student-affairs/ch-8-admissions-oregon-residency/professional-development-and>) that recognizes the "importance of encouraging and supporting employees in professional development activities that are related to their employment." The University of Oregon, Office of Human Resources (<https://hr.uoregon.edu/learning-and-development>) offers a central resource for coordinating training, assisting instructors, and providing an easy access portal for learners and the Teaching Engagement Program (TEP) provides faculty support for their teaching through workshops, seminars, and individual consultations on best practices.



## COLLABORATION

The University of Oregon benefits from, and contributes to, a host of collaborative activities with other postsecondary institutions. Additionally, the UO participates in cooperative contracting with the other Oregon public universities and with national cooperative contracts. Various leadership councils provide a great opportunity for continued collaboration and information-sharing regarding current and anticipated issues and shared goals. Faculty at all public universities are represented at the Inter-Institutional Faculty Senate (IFS) that is made up of elected senate representatives from each institution. The IFS serves as a forum for all faculties of Oregon public universities in matters of shared concern. The University of Oregon engages in several collaborative initiatives with other universities and partners, as indicated below (P indicates participation; N/P indicates non-participation):

**Table 7: UO Collaborative Initiatives Participation**

|  |     |
|--|-----|
| Public University Councils:                            |     |
| Presidents Council                                     | P   |
| Provosts Council                                       | P   |
| Vice Presidents for Finance and Administration (VPFAs) | P   |
| General Counsels (GCs)                                 | P   |
| Public Information Officers (PIOs)                     | P   |
| Legislative Advisory Council (LAC)                     | P   |
| Cooperative Contracting                                | P   |
| Capital Construction Services                          | N/P |
| OWAN   | N/P |
| NERO Network   | P   |
| RAIN   | P   |
| Orbis Cascade Alliance                                 | P   |
| ONAMI  | P   |
| Other  | N/A |

The UO has played a role in higher education emergency management since 2005, when it started the National Disaster Resilient Universities (DRU) Network. The DRU Network's goal is to facilitate open communication, discussion, and resource sharing among university and college practitioners responsible for making campuses more disaster resilient. As of January 2021, the DRU Network has more than 2,200 members.

The UO provides research equipment and services to faculty at OSU, OHSU, PSU, and Oregon Tech at the same costs to UO faculty. In addition, the university uses equipment in the Center for Advance Material Characterization (CAMCOR) to support technology development by Oregon businesses (e.g., via product and materials testing). The institution also uses its research equipment for direct public benefit. For example, its world class genomic sequencing capabilities supports the state's effort to monitor COVID-19 by sequencing SARS-CoV-2 to identify variants in collaboration with the Oregon Health Authority and

supports salmon recovery efforts by sequencing of salmonid genomes for NOAA Fisheries and other agencies.

The UO also collaborates with other universities to support student education. The UO Knight Campus for Accelerating Scientific Impact and Oregon State University's College of Engineering have a joint doctoral program in bioengineering, that allows students at each university to complete an accredited engineering degree. The UO also runs the Inside Out Program, which brings college students together with incarcerated men and women to study as peers behind prison walls. It is an opportunity for students to reconsider what they have come to know about crime and justice, and an opportunity for those inside prison to place their life experiences in a larger framework.

The launch of the Ballmer Institute for Children's Behavioral Health at the University of Oregon is building on the university's long-standing faculty expertise in children's behavior health, psychology, prevention science, and related fields in the UO College of Education and Department of Psychology. Not only will the Ballmer institute provide new career pathways in behavioral health at the undergraduate level and graduate certificate program for current teachers, but it will also enhance the provision of children's behavioral health services in schools, community, and health care settings. In addition, the university is working directly with OHSU, PSU, Mount Hood Community College, other higher education partners, school districts and nongovernmental organizations in the Portland metropolitan area to identify gaps in the behavioral health workforce and create more academic pathways for students seeking to become behavioral health services providers.

The University of Oregon's engagement with the other universities in Oregon is wide ranging and includes active participation on committees such as the Oregon Council of Presidents and related vice presidential-level groups including the provosts, chief financial officers, and senior research officers, which support collective problem solving and coordinated action. In addition, the UO participates in cross-university operational coordination networks such as in tech transfer, emergency management, and other areas. In addition to their regular work, these preexisting relationships were the foundation for robust networks for information sharing and coordination around COVID-19 response and recovery among all universities in Oregon, including four-year, community colleges, and private institutions.

## **COLLABORATIONS**

The University of Oregon participates in and leads numerous collaborations with other universities in Oregon as well as with state agencies, local governments, and communities that benefit both the university's mission and core operations as well as Oregon residents more broadly.

Importantly, the UO has a long-standing tradition of collaborating in urban and rural communities across the state. These include efforts that support the technological backbone of the state to economic development and providing technical expertise to rural communities. Examples include:

- UO is one of five founding members of Link Oregon, a consortium of the State of Oregon, and the state's four research universities – UO, OSU, OHSU, and PSU. Link Oregon supports research, education, and health care at these institutions by providing high speed (200+ Gbps) network connectivity, and connections to national US Research and Education networks including Internet2 (400 Gbps). In addition, Link Oregon supports K-12 education, public libraries, public health, state agencies, and tribal facilities statewide.
- The Women's Innovation Network, a partnership between UO and Onward Eugene helps faculty,

graduate students, and community members to navigate the gender-based barriers to bringing ideas to market and launch and sustain their businesses through peer mentoring and training.

- The Tall Wood Design Institute is a collaborative project between OSU and UO to support applied research in collaboration with industry to develop mass timber building technologies by bringing together engineers, wood scientists, and architects. Tall Wood Design Institute, in collaboration with the Port of Portland, Hacienda Community Development Corporation, Oregon Department of Forestry, and others obtained a \$41.4 million Build Back Better grant earlier this year from the Economic Development Administration to build new research and job training facilities as a brown field redevelopment at Port of Portland's Terminal 2.
- For 28 years, the UO has run RARE (Resource Assistance for Rural Environments) a program which places participants in rural Oregon communities especially along the coast and in eastern Oregon to assist with key community and economic development projects. RARE participants in recent years have also assisted with wildfire recovery in communities with major losses.
- UO has been working with a group of Lane Council of Governments and other local agencies to improve local and regional network connectivity for over 25 years. These efforts have improved high speed network options for UO operations, UO students, local public agencies and statewide higher-ed network initiatives, and provided support for creation of a Regional Fiber Consortium which allocated public access fiber optic resources in exchange for expedited permitting for long haul fiber optic infrastructure.
- UO has an agreement with Oregon Department of Administrative Services to provide equipment space for the State of Oregon's network aggregation point in Lane County. This long-standing relationship provides a secure, reliable facility for the State of Oregon's operations locally.

The UO plays a leadership role in collaborative efforts to foster community safety and resilience. For example;

- UO leads the Oregon Campus Resilience Consortium, a network that links, leverages, and aligns the institution's limited resources and collective expertise to increase emergency preparedness, threat assessment capabilities, mitigation, response effectiveness, safety, institutional resilience across public and private universities, and colleges in Oregon. This effort builds off the work of the National Disaster Resilient Universities (DRU) network, a group of higher education institutions and partners such as FEMA, US Dept. of Homeland Security, the Centers for Disease Control and Prevention, hosted by the University of Oregon.
- UO plays a leadership role in the development and management of the US Geological Survey's ShakeAlert, an earthquake early warning system in California, Oregon, and Washington, as well as AlertWildfire, a camera network that supports wildfire response that is being built out across multiple land ownerships in Oregon, California, and Nevada.
- The UO School of Law runs a Domestic Violence Clinic in partnership with local advocacy organizations Hope & Safety Alliance, for survivors of domestic violence, and Sexual Assault Support Services (SASS), for survivors of sexual assault. In a supervised environment, students assist low-income survivors of domestic violence, sexual assault, and stalking in civil legal matters, including protective order proceedings, family law matters, and employment and housing issues through hands on assistance.
- In 2022, UO launched the Center for Wildfire Smoke Research and Practice to increase community preparedness for wildfire smoke events. The Center convenes the Smoke Ready Community Network, which brings together UO, OSU, Oregon Tech, state agencies such as OHA and ODF, along with air quality agencies, and community organizations to share information, best practices and lessons learned to support smoke planning and response. A related UO entity, the Oregon Partnership for Disaster Resilience, is

supporting communities to develop smoke response plans.

The University also houses programs in partnership with state agencies and communities across Oregon to provide a broad array of services that help support Oregonians across the state. Examples include:

- Sustainable City Year Program, where students and faculty provide support to one Oregon community each year to help address their sustainability challenges related to regional planning, building design, engagement of diverse communities, and municipal budgets. Past partner communities include Troutdale, Hood River, Lane Transit District, Silverton, Gresham and Eugene, Springfield and Dunes City, La Pine, TriMet, Albany, Redmond, Lane Transit District, METRO, Multnomah County, and Salem.
- Oregon Office for Community Dispute Resolution, which supports 15 community dispute resolution centers that provide mediation and conflict resolution services to 24 Oregon counties through grant making, consultation, training, research, technical assistance, network and collaborative activities and initiatives.
- Labor Education Research Center (LERC), which provides non-credit workshops, customized training, and consulting support to workers, labor unions, and worker-oriented organizations across the state in areas such as representation skills, effective communication, building inclusive organizations, labor history, and the law.
- Career Information Services (CIS), which provides a system of occupational and educational information to Oregonians to learn about the world of work. This effort includes collaboration with a broad range of partners such as Rogue Community College, Beaverton School District, and Oregon Commission for the Blind. CIS provides information such as employment, wages, job opening outlook, job requirements, hiring practices for occupations that over 95 percent of Oregon labor market as well as detailed information about training programs, scholarship, and financial aid opportunities available to Oregonians to support career preparation. This information is used by schools, colleges, social agencies, and businesses who provide career guidance and employee development services to assist clients with the process of career planning or career transition.

# SHARED ADMINISTRATIVE SERVICES

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Pursuant to ORS 352.129 and following the convening of the Workgroup on University Shared Services established by the 2013 Legislature, the seven public universities created the University Shared Services Enterprise (USSE), a service center hosted by Oregon State University. USSE offers a fee for service model for many back-office functions previously offered by the OUS Chancellor's Office. ORS 352.129 mandated participation by the independent universities in certain services offered by USSE until July 1, 2019. These mandated services include group health insurance, group retirement plans, and collective bargaining. The UO serves as fiduciary for all the former Oregon University System retirement plans, and hosts and manages the Oregon Public Universities Retirement Plans ("OPURP") shared-services organization. All seven public universities participate in OPURP via shared-services agreement. This section reflects a statewide assessment of shared services.

This section reflects a statewide assessment of shared services.

## **Public University Shared Administrative Services**

This document provides an evaluation of shared administrative services at the public universities. It does not include information on existing shared academic programs such as transfer agreements, joint degree programs, or other services. Contextual information is provided along with information on work the universities are doing to impact the cost of administrative services in the future.

### **Key Takeaways**

- The universities are moving away from using USSE for finance and administrative services.
- Spending on institution support has increased at a rate more than double that of total spending.
- As part of the TRU + PSU financial sustainability investment, an assessment of current opportunities will occur, focusing on actionable steps to achieve savings and improve service.
- There is ongoing activity at the campus level to address the cost of administrative services.

### **History of Shared Services**

The University Shared Services Enterprise (USSE) was established during the dissolution of OUS to manage shared finance and administrative services that had been performed through the Chancellor's Office. USSE is not a separate legal entity. Rather it is established through a memorandum of understanding (MOU) executed by all seven public universities. For all services except SEIU collective bargaining and legacy debt post-issuance compliance, the universities participate voluntarily and are allowed to select services as needed.

During the past decade, USSE has been shrinking and offering fewer services as the universities elect to perform more administrative functions inhouse. During FY2015, USSE had 32 staff and an operating budget of \$4.8 million with the universities using an average of eleven services each. Table A includes a client service matrix that outlines which services were used by which university during FY2015. SEIU collective bargaining is required in statute. The services USSE provided a decade ago include financial reporting, IT hosting and maintenance, collective bargaining, benefits/payroll support, risk management, and treasury management.

| <b>Table A: USSE Client Service Matrix, FY2015</b>                    |            |            |            |            |            |           |            |
|---|------------|------------|------------|------------|------------|-----------|------------|
|   | <b>EOU</b> | <b>OIT</b> | <b>OSU</b> | <b>PSU</b> | <b>SOU</b> | <b>UO</b> | <b>WOU</b> |
| <b>Financial Reporting Services</b>                                   | X          | X          | X          |            | X          |           | X          |
| <b>IT Hosting and Maintenance</b>                                     | X          | X          |            |            | X          |           | X          |
| <b>SEIU Collective Bargaining</b>                                     | X          | X          | X          | X          | X          | X         | X          |
| <b>Benefits payments, tax payments, and reporting</b>                 | X          | X          | X          | X          | X          |           | X          |
| <b>Payroll System Support</b>   | X          | X          | X          | X          | X          |           | X          |
| <b>PERS Verification</b>  | X          | X          | X          | X          | X          |           | X          |
| <b>Administration of retirement plan contributions (ORP and 403b)</b> |            |            |            |            |            | X         |            |
| <b>Risk Management (PURMIT)</b>                                       | X          | X          | X          | X          | X          | X         | X          |
| <b><i>Treasury Management Services:</i></b>                           |            |            |            |            |            |           |            |
| <b>Legacy debt – post issuance tax compliance</b>                     | X          | X          | X          | X          | X          | X         | X          |
| <b>Legacy Debt – accounting</b>                                       | X          | X          | X          | X          | X          |           | X          |
| <b>Non-legacy debt – post issuance tax compliance</b>                 | X          | X          | X          | X          | X          |           | X          |
| <b>Non-legacy debt – accounting</b>                                   | X          | X          | X          | X          | X          |           | X          |
| <b>Banking &amp; Investment</b>                                       | X          | X          | X          |            | X          |           |            |
| <b>Endowment Administration</b>                                       | X          | X          |            |            | X          |           |            |
| <b>Public University Fund (PUF)</b>                                   |            |            | X          | X          |            |           |            |
| <b>Number of Services Used</b>  | <b>13</b>  | <b>13</b>  | <b>12</b>  | <b>10</b>  | <b>13</b>  | <b>4</b>  | <b>11</b>  |
| <b>Source: USSE staff, February 2025.</b>                             |            |            |            |            |            |           |            |

For FY2025, USSE is budgeting for a staff of 5.2 FTE and around \$1.3 million with the universities using an average of six services each. Table B includes a client service matrix that outlines which services are being used by which university during FY2025. USSE will offer labor relations and treasury management services. A few notes by type of service are included below to help explain some of the changes that have occurred in the services offered.

- **Risk Management** – These services were outsourced to a third-party provider during FY2016. Six of the seven universities participate in the Public University Risk Management Insurance Trust and negotiate for their own insurance needs.
- **IT services** – During FY2019, the TRUs outsourced IT hosting to AWS Cloud. USSE services were terminated as a result. This included almost half of the USSE staff at the time. Those positions were transitioned back to the universities or eliminated through natural attrition.

- **Financial reporting** – Four of the five universities are choosing to perform all financial reporting inhouse. This relates to the production and auditing of annual financial statements. Since external auditing is required, each university will interact separately with their chosen external auditor. USSE stopped offering those services as of June 30, 2024.
- **Payroll and benefits reporting** – Four of the six universities are choosing to perform this function inhouse requiring USSE to terminate service as of June 30, 2024. EOU has chosen to outsource this function to ADP.
- **Retirement plan contributions** – UO now manages the administration of retirement plan contributions (i.e., ORP and 403b plans) for all seven universities.
- **Public University Fund (PUF)** – Investment pool administered by OSU on behalf of all Oregon Public Universities pursuant to legislation adopted in 2014. Five of the seven universities participate in the PUF. OSU outsources most of the administrator duties to USSE.

**Table B: USSE Client Service Matrix, FY2025**

|   | EOU      | OIT      | OSU      | PSU      | SOU      | UO       | WOU      |
|---|----------|----------|----------|----------|----------|----------|----------|
| <b>SEIU Collective Bargaining</b>                     | X        | X        | X        | X        | X        | X        | X        |
| <b>Faculty Collective Bargaining</b>                  | X        | X        |          |          | X        |          |          |
| <b><i>Treasury Management Services:</i></b>           |          |          |          |          |          |          |          |
| <b>Legacy debt – post issuance tax compliance</b>     | X        | X        | X        | X        | X        | X        | X        |
| <b>Legacy Debt – accounting</b>                       | X        | X        | X        | X        | X        |          | X        |
| <b>Non-legacy debt – post issuance tax compliance</b> | X        | X        | X        | X        | X        |          | X        |
| <b>Non-legacy debt – accounting</b>                   | X        | X        | X        | X        | X        |          | X        |
| <b>Banking &amp; Investment</b>                       | X        | X        | X        |          | X        |          |          |
| <b>Endowment Administration</b>                       |          | X        | X        |          | X        |          | X        |
| <b>Public University Fund (PUF)</b>                   |          |          | X        | X        |          |          |          |
| <b>Number of Services Used</b>                        | <b>7</b> | <b>8</b> | <b>8</b> | <b>6</b> | <b>8</b> | <b>2</b> | <b>6</b> |
| <b>Source: USSE staff, February 2025.</b>             |          |          |          |          |          |          |          |

### Cost of Institution Support

Table C details the growth in spending for institution support and total operating costs. Institution support includes general operations like executive, legal, financial, accounting, space management, procurement, IT, and other general support functions. During the period noted, the annual growth rate in spending for institution support is twice that of the growth rate for total operating expenses and is the reverse of the national experience. Additionally, the relative proportion of spending for institution support increased from 7.1 percent to 9.5 percent of total spending which is also the reverse of the national experience.

For context, using headcount enrollment, this represents a doubling in spending per student on institution support from roughly \$1,300 to \$2,600 during the period noted. Had spending for institution support

during FY2022 been consistent with the national average, Oregon’s public universities would have collectively spent \$45 million less on institution support.

| <b>Table C: Growth in Institution Support Spending<br/>(Amounts in \$ thousands, unadjusted for inflation)</b>   |                                |                            |                   |                                |
|--|--------------------------------|----------------------------|-------------------|--------------------------------|
|  | <b>Institution<br/>Support</b> | <b>Total<br/>Operating</b> | <b>Proportion</b> | <b>National<br/>Comparison</b> |
| <b>2014</b>  | 174,782                        | 2,458,599                  | 7.1%              | 8.7%                           |
| <b>2015</b>  | 191,523                        | 2,437,159                  | 7.9%              | 8.6%                           |
| <b>2016</b>  | 234,322                        | 2,865,868                  | 8.2%              | 8.5%                           |
| <b>2017</b>  | 238,543                        | 2,858,161                  | 8.3%              | 8.4%                           |
| <b>2018</b>  | 251,708                        | 2,988,700                  | 8.4%              | 8.1%                           |
| <b>2019</b>  | 262,542                        | 3,064,521                  | 8.6%              | 7.9%                           |
| <b>2020</b>  | 287,959                        | 3,196,110                  | 9.0%              | 8.0%                           |
| <b>2021</b>  | 310,597                        | 3,133,949                  | 9.9%              | 8.3%                           |
| <b>2022</b>  | 308,757                        | 3,234,820                  | 9.5%              | 8.1%                           |
| <b>Annual Growth<br/>Rate</b>  | <b>7.4%</b>                    | <b>3.5%</b>                |                   |                                |
| <b>National<br/>Comparison</b>   | <b>4.1%</b>                    | <b>5.0%</b>                |                   |                                |
| <b>Source: Universities audited annual financial reports. Data for national comparison is from U.S. Department of Education, Digest of Education Statistics, Table 334.10, 4-year.</b> |                                |                            |                   |                                |

### Campus Level Activity

There is also ongoing work at UO to affect the cost of administrative services. UO reported at its board meeting in September 2024 the results of savings initiatives across seven administrative support areas. This includes purchasing, treasury operations, utilities and energy, human resources, information services, and other services. One-time cost savings of \$34.8 million were reported with recurring annual savings of \$5.1 million.



# FINANCIAL HEALTH ASSESSMENT

This section provides an assessment of the university's current financial position, assesses cost efficiency, and summarizes recent forecasting related to financial sustainability. Financial monitoring is conducted annually by HECC staff. The most recent report from which this data and analysis is drawn was published in April 2024.

The financial position of each university is assessed using currently available data. The analysis within the financial conditions report includes both quantitative and qualitative factors to provide appropriate context. The metrics are measured over time to understand emerging trends. Further, the analysis uses a dual perspective approach providing information across the whole enterprise including the foundation and then considers only the education and general (E&G) fund.

The most important predictor of financial instability is enrollment. Specifically, sharp declines in enrollment over a short period of time. UO's enrollment over the past decade has been stable relative to other Oregon public universities, with fall term FTE increasing annually on average by 0.7 percent. Additionally, by evaluating the composite financial index (CFI), UO's finances have been stable over the recent past when considering the whole enterprise (E&G funds, restricted funds, auxiliary funds, etc.) including the expendable portion of the foundation's net assets.

Table A provides a summary of the five-year trend in the E&G fund. UO generated a positive operating margin every year, with one exception, meaning sufficient revenue was collected to cover expenses. This has allowed for growth in the fund balance over time. During the period noted, expenses have grown an average of 4.1 percent annually while revenues have grown an average of 4.7 percent annually. Expenses grew less than the average annual inflation in the same timeframe which was 5.3 percent using the CPI-U for the western region.

| Table A: Trend in E&G Funds   |             |             |             |             |             |
|---|-------------|-------------|-------------|-------------|-------------|
|   | FY2020      | FY2021      | FY2022      | FY2023      | FY2024      |
| <b>Total Revenue</b>  | 545,470,659 | 535,110,914 | 577,228,070 | 618,494,186 | 655,072,422 |
| <b>Total Expenses</b>   | 552,569,432 | 530,587,624 | 545,753,170 | 597,602,952 | 649,965,054 |
| <b>Operating Margin</b>   | (7,098,773) | 4,523,290   | 31,474,899  | 20,891,234  | 5,107,368   |
|   | (1.3%)      | 0.8%        | 5.5%        | 3.4%        | 0.8%        |
| <b>% State Revenue</b>  | 15%         | 15%         | 15%         | 15%         | 15%         |
| <b>Months Operating Balance</b>                                       | 1.2         | 1.4         | 1.9         | 2.2         | 2.1         |
| Source: Survey data submitted to the HECC annually by the university. |             |             |             |             |             |

## Cost Efficiency

The changing higher education landscape will require efforts by the universities to maximize efficiency, manage spending, and improve student affordability. To assess cost efficiency, several factors are considered including the alignment of staffing levels with enrollment, the use of shared administrative services, and ongoing efforts to control costs.

Table B provides a summary of staffing and the student to faculty ratio. The total number of employees at UO has increased but at a slower rate than enrollment. UO has a much lower student to faculty ratio than other Oregon public universities. Granted, UO experienced a change in reporting methodology that affected the number of faculty reported as explained on page 24 of the 2024 edition of the Higher Education Employees Annual Report as produced by the HECC Office of Research and Data.

There is no accepted standard or best practice measure of the student to faculty ratio; however, when enrollment declines, and the number of employees does not to the same extent, this can create structural budget gaps. The level of staffing at UO changed significantly during the pandemic with the total number of employees now exceeding the number prior to the pandemic.

| Table B: Trend in Staffing  |        |        |        |        |        |          |                    |
|---|--------|--------|--------|--------|--------|----------|--------------------|
|   | 2018   | 2019   | 2020   | 2021   | 2022   | Variance | Annual Growth Rate |
| <b>Student FTE</b>  | 22,081 | 22,105 | 21,264 | 21,781 | 22,707 | 2.8%     | 0.7%               |
| <b>Admin, Management</b>  | 277    | 307    | 178    | 203    | 226    | (18.4%)  | (5.0%)             |
| <b>Classified, Professional</b>   | 3,200  | 3,228  | 2,687  | 2,660  | 2,813  | (12.1%)  | (3.2%)             |
| <b>Faculty</b>  | 1,824  | 1,888  | 2,273  | 2,297  | 2,350  | 29%      | 6.5%               |
| <b>Total Employee FTE</b>   | 5,301  | 5,423  | 5,138  | 5,160  | 5,389  | 1.7%     | 0.4%               |
| <b>Student to Faculty Ratio (UO)</b>  | 12.1   | 11.7   | 9.4    | 9.5    | 9.7    | (20.2%)  | (5.5%)             |
| <b>Student to Faculty Ratio (All OPU's)</b>   | 13.1   | 12.9   | 12.2   | 11.8   | 12.0   | (8.4%)   | (2.2%)             |
| Source: ORS 350.360 Higher Education Employees Annual Report, November 2024. The years noted are the data years as used in the report. The variance noted is from 2018 to 2022.   |        |        |        |        |        |          |                    |
| Note: In the spring of 2020, a change in reporting methodology led to significant shifts in the total reported faculty and the distribution of full-time/part-time faculty reported. The full disclosure is included on page 24 of the above referenced report. |        |        |        |        |        |          |                    |

Another way for the universities to improve efficiency would be to manage spending for institution support. This includes administrative functions like communications, legal, financial, accounting, space management, procurement, IT, and similar business services. Over time, UO has relied less on the University Shared Services Enterprise (USSE) for support. During FY2015, UO used USSE for limited support including SEIU collective bargaining, administration of retirement plan (i.e., ORP and 403b) contributions, risk management, and legacy debt tax compliance. During FY2025, UO will use USSE for

statutorily required SEIU collective bargaining and legacy debt tax compliance. It should be noted that UO now manages the administration of retirement plan contributions (i.e., ORP and 403b plans) for all seven public universities.

UO administration recently reported to its board in September 2024 the results of savings initiatives across seven administrative support areas. This includes purchasing, treasury operations, utilities and energy, human resources, information services, and other services. One-time cost savings of \$34.8 million were reported with recurring annual savings of \$5.1 million.

### **Financial Forecast**

Also in September 2024, UO staff presented long-term financial projections for the E&G fund, through FY2029, to the UO board. The purpose of the analysis is to show the range of E&G fund budget scenarios the university could face given various assumptions. Staff noted that if some of the adverse scenarios were to materialize, the university would need to take action to balance projected expenses with available revenue.

Three different scenarios based on different assumptions around tuition were explored with six different cases for each scenario that included additional assumptions for enrollment, state funding, and inflation. As part of the discussion, staff concluded that:

- Staffing levels changed significantly during the pandemic. The university lost a significant number of faculty and staff leading to temporary financial surpluses, which increased the fund balance. However, staffing has rebounded since. Projections going forward assume existing student to staffing and student to faculty ratios continue.
- First-year resident enrollment has grown significantly in the past few years; however, due to lower tuition rates, generous remissions programs such as Pathway Oregon, and low state funding, the combination of net tuition revenue and state funding does not cover the actual cost of educating resident students. The remainder of the cost is borne by non-resident students. Therefore, enrollment patterns are a key consideration with the long-term projections including multiple scenarios.
- If enrollment were to remain flat, particularly for non-resident cohorts, the rate of growth in expenses is likely to outpace tuition growth over the coming years as one-time pandemic related savings abate.
- To balance tuition revenue growth rates and expense growth rates, the university established new enrollment targets in the fall of 2023 authorizing an investment of \$16 million in FY2025 for new scholarships and started a new international enrollment partnership.

As a media story on UO's December board of trustees meeting reported: "If the university continues to miss critical out-of-state student enrollment goals while its costs only increase, its financial situation could quickly spiral out of control,' UO board chair Steve Holwerda said at the December trustees meeting, 'We can do that for a number of years, but it's just not sustainable in the long run.'"<sup>2</sup>

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<sup>2</sup> Tiffany Camhi, University of Oregon bets on top-ranked ducks to defeat budget dilemma, Oregon Public Broadcasting, December 31, 2024.

## BOARD OF TRUSTEES

The Boards of Trustees at each public university and their respective university constituents are continuing the process of developing effective working relationships. The Commission continues to recommend that the areas that all Boards should be attentive to include timing and access (for example, not scheduling meetings during exams, or when classes are not in session); and encouraging feedback by allowing non-board members to weigh in early on in the meetings rather than having to sit through the whole meeting.

| Governing Board Focus Area          | Evaluation Question                             | Supporting Narrative<br>(documentation may include links to materials on board website)   | Data Source       |
|-------------------------------------|---|---|-------------------|
| Transparency<br>(ORS 352.025(1)(a)) | Board meets at least quarterly. ORS 352.076(6). | <p>The Board of Trustees holds regular quarterly meetings of the full Board. During the 2022/23 and 2023/24 academic years the Board's quarterly meetings were held on the following dates:</p> <ul style="list-style-type: none"> <li>• September 15-16, 2022</li> <li>• December 5-6, 2022</li> <li>• March 13-14, 2023</li> <li>• June 5-6, 2023</li> <li>• September 11-12, 2023</li> <li>• December 4-5, 2023</li> <li>• March 11-12, 2024</li> <li>• June 3-4, 2024</li> </ul> <p>An off-cycle meeting was held on August 16, 2022 to address personnel and leadership renewals and vacancies.</p> <p>An emergency meeting was held on August 4, 2023 to authorize acceptance of invitation to join Big 10 Conference.</p> <p><a href="https://trustees.uoregon.edu/past-meetings">https://trustees.uoregon.edu/past-meetings</a></p> | Board of Trustees |

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|  | Board provides public notice of agenda and meetings. ORS 352.025(1)(a). | Public notice as well as agendas and meeting materials were posted in advance of each meeting on the Board's website and sent directly to the media who so requested. The Board staff additionally sends an email notification to its list of subscribed university and community members. | Board of Trustees |
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|  |   | <a href="https://trustees.uoregon.edu/past-meetings">https://trustees.uoregon.edu/past-meetings</a>  |                   |
|  | The Board operates in a transparent manner and in compliance with Public Meetings and Public Records laws. ORS 352.025(1)(a). | Board meetings are duly noticed and publicized; meetings are open to the public except executive sessions as allowed by law. Meeting documents are posted online; copies are available for the public for any materials distributed at the meeting. The Board complies with public records requests in coordination with the Public Records Office in compliance with public records laws. Board website includes contacts for the Board ( <a href="https://trustees.uoregon.edu/contact-board">https://trustees.uoregon.edu/contact-board</a> ) and for individual trustees ( <a href="https://trustees.uoregon.edu/board-trustees-university-oregon">https://trustees.uoregon.edu/board-trustees-university-oregon</a> ) | Board of Trustees |
|  | The Board has adopted bylaws. ORS 352.076(5).   | The Board adopted bylaws on January 23, 2014; they were last amended on December 10, 2024. Bylaws are available online. ( <a href="http://trustees.uoregon.edu/governance">http://trustees.uoregon.edu/governance</a>  | Board of Trustees |

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| Accountability (ORS 352.025(1)(a)) | The Board demonstrates its accountability on behalf of the university and awareness of its mission and fiduciary duties. | At each quarterly meeting the Board or its designated committee receives regular reports on finances, treasury activity, and internal audit. In addition, at each quarterly Board meeting the Board receives reports on items critical to the university's missions including student success initiatives, academic priorities, institutional activities around diversity, equity, and inclusion, and other standing topics. | Board of Trustees |
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|  |  | <p>The Board adopted a policy outlining its delegated authorities, retaining authority for transactions of certain size, scope, length or obligation. In addition, the Board adopted policies or statements relating to treasury and investment management, committee functions, trustee responsibilities, a university mission statement, presidential assessment, and other governance matters. Governance documents are available online.</p> <p><a href="http://trustees.uoregon.edu/governance">http://trustees.uoregon.edu/governance</a></p> <p>Trustees maintain a consistent focus on the long-term health of the institution. The Board of Trustees adopts the operating and capital expenditure budgets for the university, establishes tuition and fees, and authorizes the issuance of debt.</p> <p>Meeting agendas, minutes and materials articulating such discussions are available online as noted above. Audio recordings are available upon request.</p> |                   |
|  | The Board has established a process for determining tuition and mandatory enrollment fees that provides for participation of enrolled students and the recognized student government of the university. ORS 352.102(2) | The Board adopted said process on December 11, 2014. Amendments were adopted on September 11, 2015. (See “Adopted Motions and Resolutions” at <a href="https://trustees.uoregon.edu/adopted-motions-and-resolutions">https://trustees.uoregon.edu/adopted-motions-and-resolutions</a> )   | Board of Trustees |
|  | Board selects and regularly assess the university president. ORS 352.096.  | An interim President served from August 16, 2022 – March 13, 2023 following the resignation of the seated president. A new permanent President was appointed by the Board on March 13, 2023 to begin his  | Board of Trustees |

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|   |  | <p>appointment on July 1, 2023. A new interim President was appointed to serve from March 14, 2023 - June 30, 2023. (<a href="https://trustees.uoregon.edu/adopted-motions-and-resolutions#Presidency">https://trustees.uoregon.edu/adopted-motions-and-resolutions#Presidency</a>)</p> <p>The Board conducted its first annual review of the permanent President in fall 2024 and discussed it publicly at the Board's September 16, 2024 meeting. (<a href="#">Materials for that meeting can be found here</a>).</p> |                   |
| Engagement in the University's Mission (ORS 352.025(1)(b))  | The Board adopts the mission statement. ORS 352.089(2).  | The Board adopted the mission statement on November 5, 2014.  | Board of Trustees |
| Coordination across the State of Oregon (ORS 352.025(1)(e)) | The Board forwards the university's mission statement to the HECC. ORS 352.089(1).                       | Following adoption on November 5, 2014, the mission statement was forwarded to the HECC, which approved it on June 11, 2015.  | Board of Trustees |
|   | The Board forwards any significant change in the university's academic programs to HECC. ORS 352.089(1). | <p>The UO forwarded changes in the university's academic programs (as defined by rule) to the HECC following Board approval. During 2021-2024, the Board approved the following new academic programs.</p> <p>2021</p> <ul style="list-style-type: none"> <li>• BA/BS in Native American and Indigenous Studies</li> <li>• PhD in Spanish with an MA in passing</li> <li>• MS in Applied Behavior Analysis</li> </ul> <p>2022</p> <ul style="list-style-type: none"> <li>• PhD in Data-Driven Music</li> </ul>          | Board of Trustees |



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|   |  | <ul style="list-style-type: none"> <li>• BA/BS in Child Behavioral Health</li> <li>• BA/BS in Environmental Design</li> </ul> <p>2023</p> <ul style="list-style-type: none"> <li>• BA/BS in Popular Music</li> <li>• BS in Cybersecurity</li> <li>• EdS in Educational Leadership</li> </ul> <p>2024</p> <ul style="list-style-type: none"> <li>• EdS in School Psychology (new degree and additional location)</li> <li>• BS in Materials Science and Technology</li> <li>• MS in Historic Preservation (location change only)</li> </ul> <p><a href="https://trustees.uoregon.edu/adopted-motions-and-resolutions#New%20Program%20Approval">https://trustees.uoregon.edu/adopted-motions-and-resolutions#New%20Program%20Approval</a></p> |                   |
| Real Property Holdings (ORS 352.025 (2)(c)) | Legal title to all real property, whether acquired before or after the creation of a governing board, through state funding, revenue bonds or philanthropy, shall be taken and held in the name of the State of Oregon, acting by and through the governing board. | The University of Oregon complies with ORS 352.025(2)(c). Individual items are not listed here given the volume of property associated with the university.   | Board of Trustees |

## CONCLUSION

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This report is prepared in accordance with Oregon Revised Statute (ORS) 352.061, which requires the Higher Education Coordinating Commission (HECC) to evaluate each public university's progress in achieving statewide goals and outcomes, assess progress toward the "40-40-20" mission for postsecondary education described in ORS 350.014, and review the effectiveness of institutional governing boards as outlined in ORS 352.025. The findings in this report draw on institutional accreditation materials, self-assessments, state and federal data, and regular reporting, with a focus on alignment with the HECC Strategic Plan and Oregon's higher education objectives.

The University of Oregon (UO) has continued to advance statewide priorities related to student access, success, and completion. From fall 2023 to fall 2024, total enrollment increased by 2.6 percent (from 23,834 to 24,462 students), reflecting growth in both resident (+3.7 percent) and non-resident (+1.5 percent) student populations. UO has also demonstrated notable gains in serving historically underrepresented students, with underrepresented minority (URM) enrollment increasing by approximately 10.9 percent since the last evaluation. As of fall 2024, URM students comprise a growing share of the student body. The first-year retention rate for the fall 2022 cohort was 85.7 percent, and six-year graduation rates have improved, with the most recent data showing continued gains for URM, Pell Grant, and first-generation students. In the 2023-24 academic year, UO awarded 2,442 resident bachelor's degrees, and overall completions have remained stable.

Financial sustainability remains an area of close attention. UO's resident undergraduate tuition and fees have risen 58 percent over the past decade, now totaling \$15,667 in 2023-24. The Oregon Guarantee Program has provided greater tuition predictability, but the total cost of attendance continues to rise, posing ongoing affordability challenges. UO's institutional aid—including scholarships and remissions—has helped mitigate these pressures for some students, but the proportion facing unmet need remains high.

UO maintains its status as a Carnegie R1 institution and continues to report steady research expenditures, with \$160.5 million in FY22. The university's research and scholarly activity support economic development and academic innovation statewide, and UO's student-to-faculty ratio of 9.7:1 supports high-quality, personalized instruction. The university's ongoing participation in collaborations such as Link Oregon, the Tall Wood Design Institute, and the Center for Wildfire Smoke Research and Practice demonstrates UO's engagement with statewide partners and its contributions to Oregon's academic, economic, and community needs.

In the area of shared administrative services, UO continues to play a key role in managing statewide retirement plans and selected collaborative functions, while also maintaining certain operations internally for institutional efficiency and responsiveness.

In summary, the University of Oregon demonstrates ongoing progress in alignment with statutory requirements and HECC's strategic priorities, particularly in the areas of student access, success, and research. Persistent challenges regarding affordability and financial sustainability remain, and continued attention to these issues will be necessary. UO's strategic alignment with state educational goals and its commitment to student success, research, and statewide engagement position it as a critical partner in advancing Oregon's higher education system.

