



**Western Oregon University Board of Trustees:  
Finance & Administration Committee  
Meeting No. 7 – April 14, 2017  
Public Site: Hamersly Library, Room 205  
1:00 – 5:00 PM**

**AGENDA**

- 1) Call-to Meeting / Roll Call**
- 2) Chair's Welcome / Announcements**
- 3) Consent Agenda**
  - (a) Approval January 6, 2017 FAC meeting minutes
- 4) Reports**
  - (a) Q2 Investment Report – Penny Burgess
- 5) Action Item:**
  - (a) FY17 Q3 Management Report
- 6) Break**
- 7) Action Item:**
  - (b) 2017-2018 Tuition and Fees
- 8) Discussion Items:**
  - (a) Capital construction update
- 9) Updates and Around-the-Table / Board meeting prep**
- 10) Adjournment**



**Western Oregon University Board of Trustees:  
Finance & Administration Committee  
Meeting No. 6 – January 6, 2017  
Public Site: Werner University Center, Calapooia Room  
9:00 AM – 1:00 PM**

**MINUTES**

**DRAFT**

**1) Call-to Meeting / Roll Call**

Chair Taylor called the meeting to order at 9:09 am.

Committee members present: Jaime Arredondo, Ivan Hurtado, Cec Koontz, Louis Taylor (Chair), Eric Yahnke (Vice President for Finance and Administration & CFO)

Others present: Jodi Daugherty (Eide Bailly), Kristin Diggs (Eide Bailly), Leo Mejia Aguilar (ASWOU Director of Business & Finance), Reina Morgan (Assistant)

**2) Chair's Welcome / Announcements**

Chair Taylor welcomed the committee and guests. He announced that he will be out of town for the January full board meeting, but that he will be able to call in and give his report over the phone.

**3) Consent Agenda**

- (a) Approval of FY15 and FY16 FAC meeting minutes

Koontz made a motion to approve the minutes as presented. Arredondo seconded the motion and all were in favor.

**4) Action Item:**

- (a) [FY17 Q2 Management Report](#)

VP Yahnke discussed the Q2 management report and responded to questions. Taylor made a motion to recommend the management report to the Board for approval as presented. Arredondo seconded the motion and all were in favor.

- (b) [WOU 2016 Annual Financial Report](#)

VP Yahnke introduced Jodi Daugherty and Kristin Diggs from the Eide Bailly team that conducted our audit. They discussed the process they went through as well as what their findings were. The audit report was turned in to the Secretary of State in advance of the November 15 deadline.

Koontz made a motion to recommend the audit report to the Board for approval. Hurtado seconded the motion and all were in favor.

## **5) Discussion Items:**

### **(a) Natural Sciences Building renovation update**

Geology professor, Dr. Steve Taylor, gave an update on the natural science building renovation. The building will have to be vacated while the renovations take place so they will be temporarily moving into the old College of Education building. Some changes will have to be made to the old COE building in order to use it for the labs and other classes since the current layout was not designed for that type of use. It will be approximately two years until the renovation is complete.

### **(b) Tuition Increase Range**

VP Yahnke led a discussion on the upcoming tuition increases. The proposed “not to exceed” rates are an 8.95% (weighted average) increase for undergraduate residents, 10% for non-residents, 16.62% (weighted average) for WUE students, and 10% for graduate students.

Koontz made a motion to recommend the “not to exceed” rates to the board for approval as presented. Arredondo seconded the motion and all were in favor.

## **6) Updates and Around-the-Table / Board meeting prep**

The committee discussed which topics should be presented to the full board.

VP Yahnke shared that the university was informed that US Bank will no longer do e-disbursement for us so Business Services and UCS have worked really hard to have a new e-disbursement process in place for the start of winter term without the students being impacted at all.

## **7) Adjournment**

The meeting was adjourned at 1:06pm.

# Report on Investments – as of December 31, 2016

## Market Background

*(Provided by Callan Associates, Oregon Investment Council consultant)*

## Macroeconomic Environment

Donald Trump is inheriting one of the strongest economies that has been handed to a new President in recent history (based on calendar third quarter Gross Domestic Product (G.D.P.)). Since the 1970's, only George H.W. Bush and Jimmy Carter assumed the office with higher G.D.P. growth rates. Further, investors have been cheered by Trump's anticipated business-friendly ambitions on taxes, trade and regulations that drove U.S. stocks to record highs during 2016. The Standard and Poor's (S. & P.) 500 Index gained 3.8 percent for the fourth calendar quarter of 2016 and 12 percent for the calendar year. Small stocks, as measured by the Russell 2000, roared 8.8 percent for the quarter and surged 21.3 percent for the calendar year. The bond market did not fare as well, especially post-election. The prospect of increased fiscal spending sparked concerns over higher inflation and tighter monetary policy, leading to a sharp sell-off in U.S. Treasuries. The 10-year Treasury yield climbed 85 basis points, the largest quarterly increase since 1994. The year was a volatile one for bonds; the 10-year Treasury yield started the year at 2.27 percent, hit an all-time low of 1.37 percent in July (post-Brexit) and ended the calendar year sharply higher at 2.45 percent.

The U.S. economic picture continued to improve during the final quarters of 2016. Third calendar quarter G.D.P. was revised up to 3.5 percent (1.7 percent year-over-year), the sharpest quarterly increase in two years. Unemployment reached a nine-year low of 4.6 percent in November and jobless claims remained relatively muted. Initial jobless claims fell to less than 300,000 in early 2015 and remained below this key level for more than 90 weeks, the longest streak since 1970. The Atlanta Federal Reserve's wage growth tracker index showed that wages advanced 3.9 percent in October, the fastest since November of 2008. Home prices hit a record high in October; the S. & P. CoreLogic Case-Shiller U.S. National Home Price Index rose 5.6 percent in October for the trailing 12-month period. The average price for an existing single family home was \$282,341 in November, the highest ever. New and existing home sales also posted strong gains, perhaps fueled by buyers rushing to lock in mortgage rates. Consumer confidence, as measured by the Conference Board's Consumer Confidence Index, hit its highest level in 15 years in December. Auto sales are on pace to beat last year's record of 17.5 million light vehicles. Even the manufacturing sector showed signs of improvement with the Institute for Supply Management Composite Index of factory sector activity showing consistent gains through the quarter.

Inflation, while still benign, is rising. For the trailing 12-month period, the Consumer Price Index (C.P.I.) rose 1.7 percent in November, the most since 2014. Core C.P.I. (excluding food and energy) was slightly higher at 2.1 percent. The Federal Reserve's (Fed) preferred metric, the Personal Consumption Expenditures Index, rose 1.4 percent over the same time period but remains short of the 2 percent target. Oil prices surged to their highest level in 17 months to close the calendar year at \$54 per barrel. The U.S. dollar soared, hitting a multi-year high versus the euro and the yen and appreciating roughly 7 percent versus a basket of currencies for the quarter.

The Fed, in a widely anticipated move, raised the Federal Funds rate 25 basis points to a range of 0.50 percent to 0.75 percent in December. This turned out to be the Fed's only move for the year although at the

end of 2015 it had projected four hikes in 2016. As communicated in its "dot plot," the Fed expects three additional hikes in 2017, though the markets expect fewer. Interest rates began to creep up early in the fourth calendar quarter as investors gained confidence that the Fed would make a move in response to encouraging U.S. economic data. Trump's win propelled rates sharply higher fueled by expectations for escalating inflation in tandem with more debt. The 10-year U.S. Treasury closed the year at 2.45 percent but hit an intra-quarter high of 2.60 percent, the highest since September 2014.

Overseas, the European Central Bank announced that it would extend its asset purchase program beyond March, 2017 when it was set to expire, but purchases will be lower (€60 billion per month down from €80 billion per month). Italians voted "no" to reforms and a rescue fund was created for troubled banks in response to acute challenges at Monte dei Paschi di Siena. Deutsche Bank settled with the U.S. Department of Justice for its role in selling mortgages during the crisis, agreeing to a \$7.2 billion payment (roughly half of what was originally suggested). The unemployment rate in the euro zone declined to 9.8 percent in October, the lowest since July 2009; it has been falling since reaching a record high of 12.1 percent in April 2013. The range in unemployment rates is highly divergent among euro zone countries, with Spain's at 19 percent and Germany's at a 35-year low of 4 percent. Consumer prices in the euro zone increased 0.6 percent year-over-year in November, the highest since April 2014, but well below the 2 percent target. G.D.P. is expected to have picked up in the final months of the year from the 0.3 percent (1.6 percent year-over-year) pace registered in the third calendar quarter to 0.4 percent to 0.5 percent.

In Asia, the Japanese economy advanced 0.3 percent (1.0 percent year-over-year) in the third calendar quarter, below the preliminary estimate of 0.5 percent. The economy continues to struggle in spite of aggressive stimulus measures. The Bank of Japan made no changes to its monetary policy but upgraded the outlook for 2017 given the yen's weakness versus the U.S. dollar, which should provide a boost to exports. The dollar reached a 14-year high versus the yen.

Despite worries at the start of 2016, China ended the calendar year with growth expected to be in line with its target of 6.5 percent. China's stock market stabilized and is up 19 percent since its low in late January, 2016. Its currency has depreciated, but in an orderly fashion. However, challenges remain in the form of a high debt load and an overheated property sector.

### **Equity Market Results**

Equities posted strong returns in the fourth calendar quarter, cheered by relatively good economic data, a rebound in corporate earnings, and speculation that Trump's presidency will bring lower taxes, lighter regulation and increased spending. The S. & P. 500 climbed to an all-time high of 2,239 on December 30 and closed up 3.8 percent for the quarter. However, there were stark differences in sector returns. Financials (+21.1 percent) were beneficiaries of Trump economics (Trumponomics), riding expectations for a more lenient regulatory environment and higher interest rates while Health Care (-4.0 percent) was one of the worst performing sectors. While smaller cap biotechnology stocks performed well, uncertainty over the future of Obamacare hurt hospitals. The newly established Real Estate Investment Trust (R.E.I.T.) sector (-4.4 percent) was punished by rising interest rates. Small capitalization stocks outperformed large by a wide margin; the Russell 2000 rose 8.8 percent in the quarter and is up 21.3 percent for the year while the Russell 1000 gained 3.8 percent and 12.1 percent for the same periods. Value sectors gained favor after prolonged underperformance. While this trend was in place before the election, Trump's win boosted Financials and Energy stocks, which make up a significant portion of the value indices. The largest difference between

growth and value was in small cap stocks. The Russell 2000 Value outperformed its Growth counterpart by 10.5 percent (+14.1 percent versus +3.6 percent) in the quarter and by double that amount, 20.4 percent, over the year (+31.7 percent versus +11.3 percent).

Foreign developed and emerging market indices trailed the S. & P. 500. The Morgan Stanley Capital Indices (M.S.C.I.) All-Country World Index ex-US fell 1.3 percent, modestly below the M.S.C.I. Europe Australasia Far-East's negative 0.7 percent result. Dollar strength was broad-based and thus detracted from returns for U.S. investors. In developed markets, Italy (+11 percent) was the top performer in the fourth calendar quarter, although it remains at the bottom of the pack for the year (-11 percent). The M.S.C.I. Emerging Markets Index dropped 4.2 percent for the quarter. Among emerging markets, Russia posted the best return (+19 percent) while Turkey (-14 percent) sank. Turkey's economy shrank 1.8 percent in the third calendar quarter, its first year-over-year decline since 2009. Mexico, hurt by Trumponomic concerns, was down 8 percent.

### **Fixed Income Market Results**

Interest rates in the U.S. rose sharply in the fourth calendar quarter, driven both by encouraging economic data and worries that the pro-growth agenda put forth by President-elect Donald Trump will have an inflationary effect. The 10-year U.S. Treasury yield rose 85 basis points and returned minus 6.8 percent for the quarter in the sharpest quarterly selloff in more than two decades. Treasury Inflation Protected Securities (T.I.P.S.) outperformed nominal Treasuries, bolstered by rising expectations for inflation. The Bloomberg Barclays T.I.P.S. Index returned minus 2.4 percent for the quarter but ended the year up 4.7 percent. The 10-year inflation breakeven rate was 1.95 percent as of December 30.

The Bloomberg Barclays U.S. Aggregate Index was down 3.0 percent for the quarter while up 2.6 percent for the calendar year. The Corporate sector returned negative 2.8 percent and positive 6.1 percent for the same periods. Issuance by U.S. corporations hit another record high in 2016 at roughly \$1.3 trillion. Long maturity bonds performed the best, in relative terms, with long corporates outperforming like-duration Treasuries by 436 basis points. Mortgages underperformed Treasuries as durations extended with the increase in interest rates. The Bloomberg Barclays High Yield Index gained 1.8 percent in the quarter and more than 17 percent for the year.

The municipal bond sector faced headwinds in the fourth calendar quarter with robust supply, concerns over Trump's desire for lower taxes, and rising interest rates contributing to outflows from the sector. Supply in 2016 was \$445 billion, breaking its record from 2010 (\$443 billion). The Bloomberg Barclays Municipal Bond Index fell 3.6 percent for the quarter and was essentially flat (+0.2 percent) for the calendar year.

Overseas, yields were also higher though dollar strength was the primary driver of sharply negative returns for unhedged indices. The Bloomberg Barclays Global Aggregate ex-US Index fell 10.3 percent for the quarter (-1.9 percent on a hedged basis). The U.S. dollar benefited from higher interest rates as well as prospects for growth. The yen lost more than 13 percent versus the dollar over the course of the quarter and the euro depreciated by more than 6 percent. Emerging markets debt underperformed developed markets. The J.P. Morgan Emerging Market Bond Global Diversified Index dropped 4.0 percent for the quarter and the local currency Global Bond Index-Emerging Market Global Diversified lost 6.1 percent.

### **Other Asset Results**

Commodities benefitted when the Organization of the Petroleum Exporting Countries (O.P.E.C.) announced cuts as well as the prospect of increased infrastructure spending. In November, O.P.E.C. agreed to production cuts to reduce output by 1.2 million barrels per day or roughly one percent of global output. Several non-O.P.E.C. nations also agreed to cut output by around half a million barrels per day. Oil closed the year at \$54 per barrel, the highest level since July 2015. The S. & P. Goldman Sachs Commodity Index rose 5.8 percent for the quarter and 11.4 percent for the year. Master Limited Partnerships (M.L.P.s) were up modestly during the quarter (Alerian M.L.P. Index +2.0 percent) with stronger results for the year (+18.3 percent).

### **Closing Thoughts**

We enter 2017 with U.S. stock markets at new highs, rising interest rates and historically low volatility. The U.S. economy continues to gain traction and there are glimmers of hope that a bottom has been reached overseas. However, a whole host of geopolitical challenges continues to cause angst. Further, the election of Donald Trump has resulted in widespread speculation as to the impact his policies will have on markets, but much uncertainty remains with respect to the scope, implementation and timing of these policies. With this in mind, we caution investors to maintain a long-term perspective. As always, prudent asset allocation with appropriate levels of diversification remains Callan's recommended course.

## **Public University Fund**

*(Prepared by the Public University Fund Administrator)*

The Public University Fund (P.U.F.) declined 0.7 percent for the quarter and declined 0.3 percent fiscal year-to-date through December 31, 2016. During the quarter, the Oregon Short-Term Fund outperformed its benchmark by 20 basis points and the Oregon Intermediate-Term Pool and Long-Term Pool outperformed their benchmarks by 90 and 80 basis points, respectively. For the three-year period, the Oregon Short-Term Fund and Intermediate-Term Pool outperformed their benchmarks by 50 and 20 basis points, respectively, while the Long-Term Pool underperformed its benchmark by 50 basis points.

In late December, Oregon State Treasury fixed income portfolio manager, Tom Lofton, conducted a quarterly performance review with University staff and its investment advisor. Mr. Lofton indicated that the volatility in bond prices during the quarter was driven by positive economic data reports and investors' rising inflation expectations. While the Intermediate-Term and Long-Term Pools posted negative returns for the quarter, Mr. Lofton's strategy of holding securities with shorter average durations (maturities) compared to the benchmark supported positive relative performance during the period. The rise in the Long-Term Pool's cash position to 13 percent during the quarter is a function of sector allocation changes near quarter-end as Mr. Lofton sold mortgage-backed securities in anticipation of increasing allocations to government securities during the third fiscal quarter.

During the quarter, investment earnings distributed to Western Oregon University totaled \$213,580. The market value of WOU's allocable share of the P.U.F. was \$43,067,258 on December 31, 2016.

<b>WOU Operating Assets Invested in the P.U.F.</b>	<b>Quarter Ended 12-31-16</b>	<b>Prior Fiscal YTD</b>	<b>Current Fiscal YTD</b>	<b>3 Year Avg</b>	<b>Market Value</b>	<b>Asset Allocation</b>
<b>Oregon Short Term Fund</b>	0.3%	0.3%	0.5%	0.6%	\$ 11,827,294	27.5% <sup>1</sup>
<i>Benchmark 91 day T-Bill</i>	<i>0.1%</i>	<i>0.0%</i>	<i>0.2%</i>	<i>0.1%</i>		
<b>Oregon Intermediate Term Pool</b>	-0.8%	0.0%	-0.5%	N/A	\$ 19,822,852	46.0% <sup>1</sup>
<i>Benchmark - Barclay's U.S. Aggregate 3-5 yrs.</i>	<i>-1.7%</i>	<i>0.3%</i>	<i>-1.4%</i>	<i>1.6%</i>		
<i>Combined Historical Returns <sup>2</sup></i>				<i>1.8%</i>		
<b>P.U.F. Long Term Pool</b>	-1.8%	0.5%	-1.2%	N/A	\$ 11,417,112	26.5% <sup>1</sup>
<i>Benchmark - Barclay's U.S. Aggregate 5-7 yrs.</i>	<i>-2.6%</i>	<i>1.6%</i>	<i>-2.2%</i>	<i>3.1%</i>		
<i>Combined Historical Returns <sup>2</sup></i>				<i>2.6%</i>		
<b>WOU Operating Assets Invested in the P.U.F.</b>	-0.7%	0.3%	-0.3%		\$43,067,258	100.0%

<sup>1</sup> The Public University Fund (P.U.F.) policy guidelines define investment allocation targets based upon total participant dollars committed. Core balances in excess of liquidity requirements for the participants are available for investment in the Intermediate-Term Pool and the Long-Term Pool. Maximum core investment allocations are determined based upon anticipated average cash balances for all participants during the fiscal year.

<sup>2</sup> The historical returns presented combine the investment returns from the predecessor fund with the investment returns of the P.U.F., for investments with an identical mandate. The predecessor fund commingled all public universities operating assets into a cash and investment pool.

# Investment Report – Q2 FY17

Board of Trustees  
Finance and Administration Committee  
April 14, 2017



# Public University Fund Investment Returns

WOU Operating Assets Invested in the P.U.F.	Quarter Ended 12-31-16	Prior Fiscal YTD	Current Fiscal YTD	3 Year Avg	Market Value	Asset Allocation
Oregon Short Term Fund	0.3%	0.3%	0.5%	0.6%	\$ 11,827,294	27.5% <sup>1</sup>
Benchmark 91 day T-Bill	0.1%	0.0%	0.2%	0.1%		
Oregon Intermediate Term Pool	-0.8%	0.0%	-0.5%	N/A	\$ 19,822,852	46.0% <sup>1</sup>
Benchmark - Barclay's U.S. Aggregate 3-5 yrs.	-1.7%	0.3%	-1.4%	1.6%		
Combined Historical Returns <sup>2</sup>				1.8%		
P.U.F. Long Term Pool	-1.8%	0.5%	-1.2%	N/A	\$ 11,417,112	26.5% <sup>1</sup>
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<sup>2</sup> The historical returns presented combine the investment returns from the predecessor fund with the investment returns of the P.U.F., for investments with an identical mandate. The predecessor fund commingled all public universities operating assets into a cash and investment pool.

## Public University Fund updates

- January 2017 - Investment Policy changes approved by the OSU Board
- January 2017 - OSU establishes a framework to guide future P.U.F. investment policy change requests
  - Changes require consent by the majority of participating universities prior to approval
- April 3, 2017 - Core Bond Fund initiated, includes fossil fuel divestment

# Debt Management Outstanding Debt Profile

Board of Trustees  
Finance and Administration Committee  
April 14, 2017



# Debt Profile

Debt Type	State Funded Debt	WOU Funded Debt	Total Debt Issued
Article XI-F(1) Bonds (1)	\$0.0 million	\$50.2 million	\$50.2 million
Article XI-G Bonds	\$10.7 million	-	\$10.7 million
Article XI-Q Bonds (2)	\$34.4 million	-	\$34.4 million
COPs (2)	\$1.1 million	-	\$1.1 million
Lottery Bonds	\$10.5 million	-	\$10.5 million
Oregon Department of Energy Loans (SELP) (3)	\$4.1 million	\$0.2 million	\$4.3 million
<b>Total Outstanding Debt</b>	<b>\$60.8 million</b>	<b>\$50.4 million</b>	<b>\$111.2 million</b>

(1) Debt for the Dept of Public Safety building is paid by a general fund debt service appropriation per agreement with the State.

(2) Principal payments with a payment date of May 1 have been removed from the outstanding debt total.

The Institutional payment due date is one month prior to the May 1 payment date per agreement with the State.

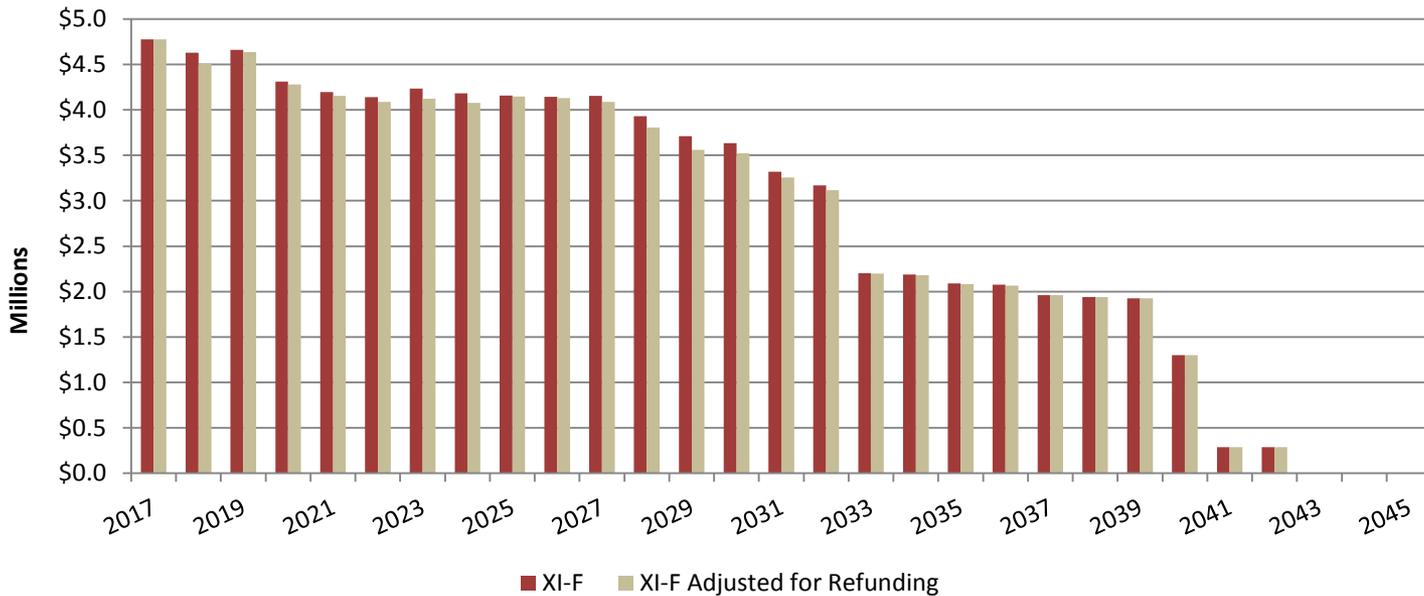
(3) Oregon Department of Energy Loans (SELP) balances are as of June 30, 2016.

# Debt Service Institution-Paid



\$77.1 million total debt service over life of the existing bonds

# Debt Service XI-F(1) Institution-Paid



\$1.1 million potential refunding savings

**Western Oregon University**  
**Quarterly Management Report**  
(Unaudited, non-GAAP, For management purposes only)

**As of March 31, 2017**  
**For the Fiscal Year Ended June 30, 2017**

	Year-to-Date					Budget		Projections				Notes
	YTD Actual	YTD as a % of Projected	Prior YTD as % of PY Actual	% chg Current/ Prior YTD	Notes	Prior Yr. Actual	Adjusted Budget	Projected 6/30/2016	Variance from Adj. Budget	Chg since Prior Report	% chg since Prior Report	
(in thousands except enrollment)												
<b>EDUCATION &amp; GENERAL</b>												
State General Fund	20,042	84%	84%	4%		17,620	23,888	23,888	0	0	0%	
Tuition & Resource Fees, net of Remissions	38,788	99%	97%	4%		39,473	39,179	39,239	60	(517)	-1%	
Other	2,796	77%	72%	2%		3,261	3,561	3,612	51	19	1%	
<b>Total Revenues</b>	<u>61,626</u>	<u>92%</u>	<u>91%</u>	<u>4%</u>		<u>60,354</u>	<u>66,628</u>	<u>66,739</u>	<u>111</u>	<u>(498)</u>	<u>-1%</u>	
Personnel Services	(38,692)	72% -	72%	5%	(1)	(48,599)	(54,686)	(53,775)	911	911	-2%	(2)
Supplies & Services & Capital Outlay	(4,289)	49%	52%	10%	(3)	(8,544)	(8,961)	(8,752)	209	209	-2%	
<b>Total Expenditures</b>	<u>(42,981)</u>	<u>69%</u>	<u>69%</u>	<u>5%</u>		<u>(57,143)</u>	<u>(63,647)</u>	<u>(62,527)</u>	<u>1,120</u>	<u>1,120</u>	<u>-2%</u>	
<b>Net from Operations</b>	<u>18,645</u>					<u>3,211</u>	<u>2,981</u>	<u>4,212</u>	<u>1,231</u>	<u>622</u>		
Transfers In	37	103% +	99%	-93%	(4)	453	0	36	36	(37)	-103%	
Transfers Out	(2,622)	69%	47%	10%	(5)	(4,109)	(2,982)	(3,792)	(810)	(810)	21%	(5)
Fund Additions/(Deductions)	0					0	0	0	0	0		
Change in Fund Balance	16,060					(445)	(1)	456	457	622		
<b>Beginning Fund Balance</b>	<u>9,173</u>					<u>9,618</u>	<u>11,294</u>	<u>11,294</u>	<u>0</u>	<u>0</u>		
<b>Ending Fund Balance</b>	<u>25,233</u>					<u>9,173</u>	<u>11,293</u>	<u>11,750</u>	<u>457</u>	<u>(225)</u>	<u>-2%</u>	
<b>% Operating Revenues</b>						<u>15.2%</u>	<u>16.9%</u>	<u>17.6%</u>			<u>0%</u>	
Student FTE Enrollment - Summer, Fall & Winter	4,446	98%	96%	-2%		4,744	4,552	4,537	(15)	(28)	-1%	
<b>AUXILIARY ENTERPRISES</b>												
Enrollment Fees	7,153	99%	99%	6%	(6)	6,844	6,845	7,260	415	415	6%	
Sales & Services	10,383	73%	73%	-4%		14,865	15,075	14,271	(804)	(804)	-6%	(7)
Other	1,167	64%	59%	16%	(8)	1,714	1,706	1,831	125	125	7%	(8)
<b>Total Revenues</b>	<u>18,703</u>	<u>80%</u>	<u>79%</u>	<u>1%</u>		<u>23,423</u>	<u>23,626</u>	<u>23,362</u>	<u>(264)</u>	<u>(264)</u>	<u>-1%</u>	
Personnel Services	(7,580)	72% -	73%	2%		(10,176)	(10,668)	(10,481)	187	0	0%	
Supplies & Services & Capital Outlay	(8,722)	65% -	69%	-3%		(13,016)	(14,367)	(13,345)	1,022	1,022	-8%	(9)
<b>Total Expenditures</b>	<u>(16,302)</u>	<u>68%</u>	<u>71%</u>	<u>-1%</u>		<u>(23,192)</u>	<u>(25,035)</u>	<u>(23,826)</u>	<u>1,209</u>	<u>1,022</u>	<u>-4%</u>	
<b>Net from Operations</b>	<u>2,401</u>					<u>231</u>	<u>(1,409)</u>	<u>(464)</u>	<u>945</u>	<u>758</u>		
Transfers In	2,259	75%	83%	-7%	(10)	2,930	2,807	3,030	223	43	1%	
Transfers Out	(2,780)	107% +	56%	96%	(11)	(2,558)	(514)	(2,600)	(2,086)	(186)	7%	(11)
Additions/(Deductions) to Unrestricted Net Assets	(1,359)					(1,292)	(660)	(2,560)	(1,900)	0		
Change in Unrestricted Net Assets	521					(689)	224	(2,594)	(2,818)	615		
<b>Beginning Unrestricted Net Assets</b>	<u>8,841</u>					<u>9,530</u>	<u>8,841</u>	<u>8,841</u>	<u>0</u>	<u>0</u>		
<b>Ending Unrestricted Net Assets</b>	<u>9,362</u>					<u>8,841</u>	<u>9,065</u>	<u>6,247</u>	<u>(2,818)</u>	<u>615</u>	<u>10%</u>	
						<u>37.7%</u>	<u>38.4%</u>	<u>26.7%</u>				

**Western Oregon University**  
**Quarterly Management Report**

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

**As of March 31, 2017**  
**For the Fiscal Year Ended June 30, 2017**

	Year-to-Date				Notes	Budget		Projections			Notes	
	YTD Actual	YTD as a % of Projected	Prior YTD as % of PY Actual	% chg Current/Prior YTD		Prior Yr. Actual	Adjusted Budget	Projected 6/30/2016	Variance from Adj. Budget	Chg since Prior Report		% chg since Prior Report
(in thousands except enrollment)												
<b>DESIGNATED OPERATIONS, SERVICE DEPARTMENTS, CLEARING FUNDS</b>												
Enrollment Fees	100	60%	60%	49%	(12)	112	143	167	24	24	14%	
Sales & Services	257	53%	38%	43%	(13)	469	397	489	92	92	19%	(13)
Other	1,935	73%	74%	27%	(14)	2,067	2,645	2,645	0	0	0%	
<b>Total Revenues</b>	<b>2,292</b>	<b>69%</b>	<b>67%</b>	<b>29%</b>		<b>2,648</b>	<b>3,185</b>	<b>3,301</b>	<b>116</b>	<b>116</b>	<b>4%</b>	
Personnel Services	(682)	81%	80%	50%	(15)	(566)	(1,038)	(839)	199	143	-17%	(16)
Supplies & Services & Capital Outlay	(1,103)	61%	75%	17%	(17)	(1,251)	(1,811)	(1,811)	0	0	0%	
<b>Total Expenditures</b>	<b>(1,785)</b>	<b>67%</b>	<b>77%</b>	<b>28%</b>		<b>(1,817)</b>	<b>(2,849)</b>	<b>(2,650)</b>	<b>199</b>	<b>143</b>	<b>-5%</b>	
<b>Net from Operations</b>	<b>507</b>					<b>831</b>	<b>336</b>	<b>651</b>	<b>315</b>	<b>259</b>		
Transfers In	18	27%	95%	-82%	(18)	103	54	66	12	12	18%	(19)
Transfers Out	0	n/a	100%	-100%	(20)	(126)	0	0	0	0	0%	
Additions/(Deductions) to Unrestricted Net Assets	(893)					(302)	(302)	(302)	0	0		
Change in Unrestricted Net Assets	(368)					506	88	415	327	271		
<b>Beginning Unrestricted Net Assets</b>	<b>1,307</b>					<b>801</b>	<b>1,307</b>	<b>1,307</b>	<b>0</b>	<b>0</b>		
<b>Ending Unrestricted Net Assets</b>	<b>939</b>					<b>1,307</b>	<b>1,395</b>	<b>1,722</b>	<b>327</b>	<b>271</b>	<b>16%</b>	
<b>Total unrestricted fund balance</b>						<b>49.4%</b>	<b>43.8%</b>	<b>52.2%</b>				
<b>Days of expenditures</b>						<b>19,321</b>	<b>21,753</b>					
						<b>86</b>	<b>87</b>					

Notes:

**General Fund:**

- (1) Personnel Services year-to-date higher than prior year-to-date due to negotiated salary increases and new positions beginning this fiscal year.
- (2) Personnel Services projection decrease reflects savings due to vacant positions. 32 positions are estimated to save \$911k or 11.40 FTE for the year.
- (3) Supplies & Services & Capital Outlay increase due to timing of replacement copiers on campus and new academic programs in colleges.
- (4) Prior year Transfers-in are related to capital construction bridge funding returned from the RWEC project.
- (5) Increased Transfers Out to-date and projection due to transfers to provide funding for Natural Science building renovations and moving costs.

**Auxiliary:**

- (6) Increased year-to-date Enrollment Fees and projection due to inclusion of new Student Health Center fee assessed to students for new Health Center construction.
- (7) Sales & Services revenue projection reduced to reflect declining sales in the WOU Bookstore and reduced conferences on-campus.
- (8) Current year-to-date Other Revenue higher than prior year due to earlier payment to Housing for classroom use in Ackerman Building and new grant funding for the Childcare Center. Projection increased to account for the increased grant funding.
- (9) Supplies & Services & Capital Outlay projection reduced due to reduced merchandise spending in Dining and the Bookstore and associated administrative overhead.
- (10) Transfers In actual YTD higher than prior fiscal year due to pay raises and staffing changes in Athletics.
- (11) Current year-to-date Transfers Out higher than prior year due to transfer of \$1.9M for the construction of the new Student Health & Counseling Center. Projection increased to include additional support of \$150k.

**Designated Ops/Service Cntrs:**

- (12) Enrollment Fees actual YTD and budgeted increased for the addition of the Traffic Safety Program.
- (13) Sales & Services year-to-date and projected revenue higher than prior year due to Telecommunications receipts and addition of Council of Presidents.
- (14) Other Revenue YTD increase due to the addition of the Council of Presidents this fiscal year.
- (15) Personnel Services higher for 2017 due to addition of the Council of Presidents and staffing changes in Telecommunications.
- (16) Projected Personnel Services reduced due to savings related to the timing of Council of Presidents staff hiring.
- (17) Year-to-date Supplies & Services & Capital Outlay higher than prior year-to-date due to the addition of the Council of Presidents.
- (18) Transfers In made in 2016 for Telecommunications equipment are not expected in 2017.
- (19) Adjusted Transfer In projection due to transfer for new Computer Maintenance vehicle.
- (20) Transfers Out in FY17 are not expected.

**Western Oregon University**  
**Transfers Schedule**  
**As of March 31, 2017**  
**For the Fiscal Year Ended June 30, 2017**  
(Unaudited, non-GAAP, for management purposes only)

	E&G			Auxiliary				Des Ops - Serv Dept.	Grants	Plant fund				Total	
<u>Transfers In E&amp;G</u>				(a) 36,661										36,661	
<u>Transfers Out E&amp;G</u>				(b) 2,072,452	(c) 735,001	(d) 36,661	(e) 103,117			(f) 153,695	(g) 41,305	(h) 400,000	(i) 250,000	3,792,231	
<u>Transfers In AUX</u>	(b) 2,072,452	(c) 735,001	(d) 36,661							(j) 186,189				3,030,303	
<u>Transfers Out AUX</u>	(a) 36,661							(k) 48,356		(l) 60,000	(m) 405,221			(n) 2,050,000	2,600,238
<u>Transfers In DO, SD</u>				(k) 48,356					(o) 5,694	(j) 12,169				66,220	
<u>Transfers Out DO, SD</u>														-	

Type	Description
(a) Actual	Transfers In recover of E&G funds used to cover backfill FY16 TR Child Development Centers deficit.
(b) Actual	Year-to-date Athletic operations support.
(c) Projected	Athletic operations support - Staff/Coach salaries and OPE.
(d) Projected	Transfer Out to backfill TR Child Development Center deficit.
(e) Actual	Transfer to Telecommunications to replace failed UPS power redundancy.
(f) Actual	Year to date transfer out to SELP debt service.
(g) Projected	Transfer out to SELP debt service.
(h) Actual	Transfer in support of Natural Science renovation.
(i) Projected	Transfer out to fund miscellaneous capital repair.
(j) Actual	Transfer in from equipment reserve for replacement equipment.
(k) Projected	Auxiliary funded scholarships.
(l) Actual	Fund building & equipment replacement reserves for the Werner University Center.
(m) Projected	Fund building & equipment replacement reserves for Housing, Dining, Parking and Health & Wellness Center.
(n) Actual	Transfer out for new Student Health Center construction.
(o) Actual	Transfer from TR grant funds to close fund.

**Western Oregon University**  
**Education and General Fund Operations**  
**For the Fiscal Years Ending June 30th**  
**Fiscal Year 2017 - Q3 Update (thru 3/31/2017)**

	2016	2017	FY17 Initial Budget -		2017	FY17 Budget -	
	Actual	Initial Budget	FY16 Actual	% Δ		Projected	FY17 Projected
			\$ Δ			\$ Δ	
<b>Government Appropriations</b>							
State Appropriations	22,988,339	23,887,904	899,565	3.9%	23,887,904	-	0.0%
<b>Total Government Appropriations</b>	<b>22,988,339</b>	<b>23,887,904</b>	<b>899,565</b>	<b>3.9%</b>	<b>23,887,904</b>	<b>-</b>	<b>0.0%</b>
<b>Tuition and Resource Fees, Net of Remissions</b>							
<b>Tuition Revenue</b>							
<b>Academic Year Tuition</b>							
Resident Undergraduate	19,696,359	19,662,345	(34,014)	-0.2%	19,841,859	179,514	0.9%
Nonresident Undergraduate	5,002,912	5,151,195	148,283	3.0%	4,613,119	(538,076)	-10.4%
Resident Graduate	1,477,370	1,528,956	51,586	3.5%	1,447,713	(81,243)	-5.3%
Nonresident Graduate	815,562	834,480	18,918	2.3%	691,326	(143,154)	-17.2%
Western Undergrad Exchange (WUE)	6,399,967	6,351,885	(48,082)	-0.8%	6,897,528	545,643	8.6%
Continuing Education	6,351,047	6,519,286	168,240	2.6%	6,966,934	447,648	6.9%
Faculty & Staff	336,949	351,090	14,141	4.2%	280,929	(70,161)	-20.0%
<b>Total Academic Year Tuition</b>	<b>40,080,164</b>	<b>40,399,237</b>	<b>319,073</b>	<b>0.8%</b>	<b>40,739,407</b>	<b>340,170</b>	<b>0.8%</b>
<b>Summer Session Tuition</b>	<b>1,184,784</b>	<b>1,187,217</b>	<b>2,433</b>	<b>0.2%</b>	<b>1,051,175</b>	<b>(136,042)</b>	<b>-11.5%</b>
<b>Total Tuition Revenue</b>	<b>41,264,948</b>	<b>41,586,454</b>	<b>321,507</b>	<b>0.8%</b>	<b>41,790,582</b>	<b>204,128</b>	<b>0.5%</b>
<b>Student Fees</b>							
Technology	30,975	30,975	-	0.0%	31,780	806	2.6%
Matriculation	611,757	691,862	80,105	13.1%	680,119	(11,743)	-1.7%
Other Student Fees	1,074,666	1,074,667	1	0.0%	1,182,187	107,520	10.0%
<b>Student Fee Revenue</b>	<b>1,717,398</b>	<b>1,797,504</b>	<b>80,106</b>	<b>4.7%</b>	<b>1,894,087</b>	<b>96,583</b>	<b>5.4%</b>
<b>Less Fee Remissions</b>	<b>4,594,335</b>	<b>4,204,496</b>	<b>(389,839)</b>	<b>-8.5%</b>	<b>4,446,166</b>	<b>241,670</b>	<b>5.7%</b>
<b>Tuition and Resource Fees, Net of Remissions</b>	<b>38,388,010</b>	<b>39,179,462</b>	<b>791,452</b>	<b>2.1%</b>	<b>39,238,503</b>	<b>59,041</b>	<b>0.2%</b>
<i>% Fee Remission to Gross tuition</i>	<i>11.13%</i>	<i>10.11%</i>			<i>10.64%</i>		<i>-0.5%</i>
<b>Other Revenue</b>							
Indirect Cost Recoveries	519,284	503,000	(16,284)	-3.1%	503,735	735	0.1%
Sales & Services, Other Revenue	3,272,221	3,058,285	(213,937)	-6.5%	3,108,437	50,153	1.6%
<b>Other Revenue</b>	<b>3,791,506</b>	<b>3,561,285</b>	<b>(230,221)</b>	<b>-6.1%</b>	<b>3,612,173</b>	<b>50,888</b>	<b>1.4%</b>
<b>Total Operating Revenue</b>	<b>65,167,855</b>	<b>66,628,651</b>	<b>1,460,796</b>	<b>2.2%</b>	<b>66,738,579</b>	<b>109,929</b>	<b>0.2%</b>
<b>Expenditures</b>							
Personnel Services	51,508,959	54,685,542	3,176,583	6.2%	53,774,928	(910,614)	-1.7%
Supplies & Services	7,085,008	8,757,964	1,672,956	23.6%	8,393,964	(364,000)	-4.2%
Capital Outlay	358,155	202,691	(155,464)	-43.4%	358,155	155,464	76.7%
<b>Total Expenditures</b>	<b>58,952,122</b>	<b>63,646,197</b>	<b>4,694,075</b>	<b>8.0%</b>	<b>62,527,047</b>	<b>(1,119,150)</b>	<b>-1.8%</b>
<b>Transfers</b>							
Transfers In	(529,062)	-	529,062	-100.0%	(36,661)	(36,661)	0.0%
Transfers Out - Other	2,410,365	175,000	(2,235,365)	-92.7%	984,778	809,778	462.7%
Transfers Out - Athletics Support	2,658,987	2,807,453	148,466	5.6%	2,807,453	-	0.0%
<b>Total Transfers</b>	<b>4,540,290</b>	<b>2,982,453</b>	<b>(1,557,837)</b>	<b>-34.3%</b>	<b>3,755,570</b>	<b>773,117</b>	<b>25.9%</b>
<b>Change in Fund Balance</b>	<b>1,675,443</b>	<b>-</b>			<b>455,962</b>		
<b>Beginning Fund Balance</b>	<b>9,618,199</b>	<b>11,293,642</b>			<b>11,293,642</b>		
<b>Ending Fund Balance</b>	<b>11,293,642</b>	<b>11,293,642</b>	<b>-</b>	<b>0.0%</b>	<b>11,749,604</b>	<b>455,962</b>	<b>4.0%</b>
<b>% Operating Revenues</b>	<b>17.3%</b>	<b>17.0%</b>			<b>17.6%</b>		

<b>Expenditures &amp; Transfers Out by Program</b>							
Instruction & Dept. Research	30,910,860	31,863,393	952,533	3.1%	31,970,812	107,419	0.3%
Research	752,953	656,604	(96,348)	-12.8%	691,695	35,091	5.3%
Academic Support	9,043,877	9,509,964	466,087	5.2%	9,570,966	61,002	0.6%
Student Services	6,203,442	6,626,976	423,534	6.8%	7,087,496	460,520	6.9%
Operations/Maint.	4,511,721	4,943,874	432,153	9.6%	4,454,234	(489,640)	-9.9%
Institutional Support	9,905,309	10,220,387	315,078	3.2%	9,736,623	(483,764)	-4.7%
Athletics Support	2,658,987	2,807,453	148,466	5.6%	2,807,453	-	0.0%
<b>Total Expenditures &amp; Transfers by Program</b>	<b>63,987,149</b>	<b>66,628,651</b>	<b>2,641,502</b>	<b>4.1%</b>	<b>66,319,278</b>	<b>(309,373)</b>	<b>-0.5%</b>



# Western Oregon UNIVERSITY

**2017-18 Academic Year  
&  
2018 Summer Session  
Fee Book**

Approved by the Western Oregon University Board of Trustees at the \_\_\_\_\_ 2017 meeting. All prior OUS/WOU Academic Year and Summer Session Fee Books are repealed except as to rights obligations previously acquired or incurred there under.

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*To access the 2017-18 Fee Book information online, visit the following WOU web page:*  
<http://www.wou.edu/business/services/fee-bookbudget-summary/>

# INTRODUCTION

The Western Oregon University (WOU) 2017-18 Fee Book, adopted by the Western Oregon University Board of Trustees (Board) contains policy statements and delegation of authority for a variety of WOU policies and fees and is published for public informational purposes.

## DELEGATION OF AUTHORITY

With the passage of Senate Bill (SB) 270 (2013) and effective July 1, 2015, Western Oregon University will set their tuition and fee rates under the governance of their own institutional board.

The Board annually sets fees for enrollment at WOU, including:

- Tuition
- Building Fees
- Health Service Fees
- Incidental Fees
- Student Recreation Center Fees
- Other Mandatory Enrollment Fees
- Other Special Fees as determined by the Board

The Board has delegated authority to the institution president to establish certain fees, fines, and charges for services and materials, including:

- Laboratory and Course fees
- Fees for workshops
- Instruction fees for Continuing Education, Extended Programs, and Distance Education
- Residence Hall Room and Board Rates
- Charges for auxiliary services, e.g., food services, student centers, and parking
- Fines for violation of campus regulations
- Charges for facilities use
- Charges for other materials and services

The schedule of charges is on file in the WOU business office. Income from such services must be reflected in the WOU budget.

## SUMMARY OF CHANGES

The following narratives summarize tuition and fee changes for 2017-18, focusing on resident tuition and fees. This Fee Book incorporates Summer Session rates with Academic Year rates. The Summary of Changes will only address Summer Session tuition rates when they vary from the Academic Year rates and Summer Session fee rates if they exceed Academic Year rates.

As part of the implementation of Senate Bill 242, passed in June 2011, each institution is required to establish a process which integrated student participation in the tuition-setting process in accordance with Board established guidelines (see page 28). All institutions noted compliance with these guidelines with most establishing separate Tuition Advisory Committees. Universities continue to develop and refine their respective processes.

As per ORS 351.063, as amended by SB 270 (2013), the Board may not increase the total amount of enrollment fees paid by undergraduate resident students by more than five percent annually unless the Board first receives approval from the Higher Education Coordinating Commission (HECC) or the Legislative Assembly.

Base tuition increases over 2016-17 rates:

Undergraduate resident: Base: 10.32% (\$16/credit)

Undergraduate resident: 2017 Promise: 9.94% (\$18/credit)

Undergraduate nonresident: 9.94% (\$48/credit)

Graduate resident: 9.92% (\$36/credit)

Graduate nonresident: 10.00% (\$61/credit)

WOU continues to offer to incoming resident undergraduate freshmen and transfer students a one-time choice between WOU's base tuition rate and the WOU's fixed four-year tuition rate (WOU Promise). The base rate reflects a 10.32% increase over the 2016-17 base rate. The fixed rate Promise reflects a 9.94% increase over 2016 Promise rate. Students electing the Promise rate option will not be subject to increases for a four-year period.

As approved by student government, WOU Incidental Fees will increase by 2.35% (\$8 per term) and Health Center Fees by 6.11% (\$8 per term) for the academic year. Summer term Incidental fee is increasing from the previous summer term rate by 15.04% (\$20 per term). Summer term Health Center Fee is consistent with academic year term.

## TUITION & FEE SUMMARY TABLES

The following tables provide sample calculations and comparative information for base tuition and fees for fulltime attendance for WOU.

WOU also provides an online tuition calculator for estimating cost of attendance. That online tuition calculator is available here: [www.wou.edu/admin/business/tuitioncalc/](http://www.wou.edu/admin/business/tuitioncalc/)

### Academic Year Tuition and Fee Calculation & Changes

The tables below compare full time (15 credits undergraduate) tuition and fees per term for 2017-18 academic year with 2016-17 for resident and nonresident students.

Table 1 provides a comparison of the Total Tuition & Fees for Residents while Table 2 includes the same comparison data for nonresidents.

<u>Table 1</u> 2017-18 AY Tuition & Fees - per term Undergraduate Resident			
<b>Resident</b>	<b>Credit Load</b>		
	<b>15 Credits</b>		
<u>Tuition</u>	-	\$ chg over Spring 2017	%
	-		chg
Resident -Base/Traditional	\$2,570	\$240	10.3%
Resident - Promise 2017	\$2,990	\$270	9.9%
<u>Fees</u>	-		
Building	\$45	\$0	0.0%
Incidental	\$349	\$8	2.3%
Rec Center Building	\$42	\$0	0.0%
Health & Counseling Building	\$11	\$0	0.0%
Health Center	\$139	\$8	6.1%
Total Fees	\$586	\$16	2.8%
<u>Total Tuition &amp; Fees</u>			
Resident -Base/Traditional	\$3,156	\$256	8.8%
Resident - Promise 2017	\$3,576	\$286	8.7%

<u>Table 2</u> 2017-18 AY Tuition & Fees - per term Undergraduate Non-Resident			
<b>Non-Resident</b>	<b>Credit Load</b>		
	<b>15 Credits</b>		
<u>Tuition</u>	-	\$ chg over Spring 2017	%
	-		chg
Non-Resident	\$7,965	\$720	9.9%
<u>Fees</u>	-		
Building	\$45	\$0	0.0%
Incidental	\$349	\$8	2.3%
Rec Center Building	\$42	\$0	0.0%
Health & Counseling Building	\$11	\$0	0.0%
Health Center	\$139	\$8	6.1%
Total Fees	\$586	\$16	2.8%
<u>Total Tuition &amp; Fees</u>			
Non- Resident	\$8,551	\$736	9.4%

The tables below compare full time (12 credits) Graduate tuition and fees per term for 2017-18 academic year with 2016-17 for resident and nonresident students.

Table 3 provides a comparison of the Total Tuition & Fees for Residents while Table 4 includes the same comparison data for nonresidents.

<b>Table 3</b> 2017-18 AY Tuition & Fees - per term Graduate Resident			
<b>Resident</b>	<b>Credit Load</b>		
	<b>12 Credits</b>		
<u>Tuition</u>	-	\$ chg over Spring 2017	%
	-	% chg	
Resident	\$4,788	\$432	9.9%
<u>Fees</u>	-		
Building	\$45	\$0	0.0%
Incidental	\$349	\$8	2.3%
Rec Center Building	\$42	\$0	0.0%
Health & Counseling Building	\$11	\$0	0.0%
Health Center	\$139	\$8	6.1%
Total Fees	\$586	\$16	2.8%
<u>Total Tuition &amp; Fees</u>			
Resident	\$5,374	\$448	9.1%
<b>Table 4</b> 2017-18 AY Tuition & Fees - per term Graduate Non-Resident			
<b>Non-Resident</b>	<b>Credit Load</b>		
	<b>12 Credits</b>		
<u>Tuition</u>	-	\$ chg over Spring 2017	%
	-	% chg	
Non-Resident	\$8,052	\$732	10.0%
<u>Fees</u>	-		
Building	\$45	\$0	0.0%
Incidental	\$349	\$8	2.3%
Rec Center Building	\$42	\$0	0.0%
Health & Counseling Building	\$11	\$0	0.0%
Health Center	\$139	\$8	6.1%
Total Fees	\$586	\$16	2.8%
<u>Total Tuition &amp; Fees</u>			
Non-Resident	\$8,638	\$748	9.5%

## Summer Session Tuition and Fee Calculation & Changes

The tables below compare full time (12 credits undergraduate tuition and fees per term for 2018 Summer Session with the prior Summer Session 2017 for resident and non-resident.

Table 5 provides a comparison of the Total Tuition & Fees for Resident students while Table 6 illustrates the breakdown for nonresidents.

Table 5 Summer 2018 Tuition & Fees - per term Undergraduate Resident			
Resident	Credit Load		
	12 Credits		
Tuition	-	\$ chg over Summer 2017	% chg
Resident -Base/Traditional	\$2,057	\$192	10.3%
Resident - Promise 2017	\$2,393	\$219	10.1%
Fees	-		
Building	\$34	\$0	0.0%
Incidental	\$153	\$20	15.0%
Rec Center Building	\$35	\$0	0.0%
Health & Counseling Building	\$11	\$0	0.0%
Health Center	\$139	\$8	6.1%
Total Fees	\$372	\$28	8.1%
Total Tuition & Fees			
Resident -Base/Traditional	\$2,429	\$220	10.0%
Resident - Promise 2017	\$2,765	\$247	9.8%
Table 6 Summer 2018 Tuition & Fees - per term Undergraduate Non-Resident			
Non-Resident	Credit Load		
	12 Credits		
Tuition	-	\$ chg over Summer 2017	% chg
Non-Resident	\$6,372	\$576	9.9%
Fees	-		
Building	\$34	\$0	0.0%
Incidental	\$153	\$20	15.0%
Rec Center Building	\$35	\$0	0.0%
Health & Counseling Building	\$11	\$0	0.0%
Health Center	\$139	\$8	6.1%
Total Fees	\$372	\$28	8.1%
Total Tuition & Fees			
Non-Resident	\$6,744	\$604	9.8%

The tables below compare full time (9 credits) Graduate tuition and fees per term for 2018 Summer Session with 2017 Summer session for resident and nonresident students.

Table 7 provides a comparison of the Total Tuition & Fees for resident students while Table 8 illustrates the breakdown for nonresident students.

<b>Table 7</b> Summer 2018 Tuition & Fees - per term Graduate Resident			
<b>Resident</b>	<b>Credit Load</b>		
	<b>9 Credits</b>		
<u>Tuition</u>	-	\$ chg over Summer 2017	%
	-	%	chg
Resident	\$3,591	\$324	9.9%
<u>Fees</u>	-		
Building	\$34	\$0	0.0%
Incidental	\$153	\$20	15.0%
Rec Center Building	\$35	\$0	0.0%
Health & Counseling Building	\$11	\$0	0.0%
Health Center	\$139	\$8	6.1%
Total Fees	\$372	\$28	8.1%
<u>Total Tuition &amp; Fees</u>			
Resident	\$3,963	\$352	9.7%
<b>Table 8</b> Summer 2018 Tuition & Fees - per term Graduate Non-Resident			
<b>Non-Resident</b>	<b>Credit Load</b>		
	<b>9 Credits</b>		
<u>Tuition</u>	-	\$ chg over Summer 2017	%
	-	%	chg
Non-Resident	\$6,039	\$549	10.0%
<u>Fees</u>	-		
Building	\$34	\$0	0.0%
Incidental	\$153	\$20	15.0%
Rec Center Building	\$35	\$0	0.0%
Health & Counseling Building	\$11	\$0	0.0%
Health Center	\$139	\$8	6.1%
Total Fees	\$372	\$28	8.1%
<u>Total Tuition &amp; Fees</u>			
Non-Resident	\$6,411	\$577	9.9%

### Tuition Structure and Assessment

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

There are three basic tuition and fee structures at WOU: the regular academic year, summer session, and continuing education/on-line programs. Under existing policy, each of the three tuition structures is separate, with its own unique rate setting process.

#### *Academic Year:*

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

#### *Summer Session:*

- As with the academic year, tuition supports the direct instruction and administrative costs of each institution’s summer session programs. For summer session programs, tuition is aligned to the preceding academic year’s structure.

#### *Continuing Education/On-Line:*

- Continuing Education, Extended Programs, and most Distance Education courses fall within the category previously referred to as self-support. Continuing Education/On-Line courses are offered through special campus programs not generally available during the academic year or summer session. Tuition and fees for Continuing Education are assessed regardless of residency or course load. Rates are set at levels necessary to cover (at a minimum) the direct costs of providing the course plus an indirect cost recovery for administrative overhead costs. Tuition and fees are charged to participating students apart from enrollment fees paid for other courses. Matriculation fee is assessed when appropriate.

### Student Residency

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

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

# Fees

Fees fall into three distinct categories: Mandatory Enrollment Fees, One-time Fees, and Other Student Fees. At WOU, academic or administrative units begin the process for requesting a new fee or revising an existing fee by preparing a fee proposal and submitting it to the University administration for review and approval.

The fee requests must include information regarding the academic unit initiating the fee, fee designation or name, justification of need, amount, estimated revenues and expenditures, and expected implementation date. All fee proposals are thoroughly reviewed by University administration before being approved.

## 1. Mandatory Enrollment Fees

Mandatory enrollment fees include the Building, Health Service, Incidental, Recreation Center and Student Health Building Fees. Students enrolled under the part-time student fee policy are subject to these fees at a rate appropriate to the specific number of credit hours taken each term. Institutions have the option of assessing mandatory enrollment fees during the summer session at rates comparable to those assessed in the academic year.

### *Building Fee:*

- The Building Fee is the same for all institutions. This fee is established by legislative statute ORS 351.170 and allows the universities to assess up to \$45 per student per term to finance debt service for construction associated with student centers, health centers, and recreational facilities constructed through the issuance of Article XI-F(1) bonds. The fee charge for summer session is approximately 75% percent of the academic year rate. For summer, the rate is \$34 per student. A pro rata fee is assessed on part-time students.

### *Incidental Fee:*

- Incidental fee recommendations are made by the student incidental fee committee on campus. In some instances, the student committee recommendations are supported by general campus student referenda. Funds generated by incidental fees are used to fund student union operations, educational, cultural, and student government activities, and athletics. *Statutory Authority: ORS 351.070 (3)(d)*

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

### *Health Services Fee:*

- This fee is used to support the institution's student health services, which are operated as an auxiliary enterprise on a self-sustaining basis.

### *Recreation Center and Student Health Building Fees:*

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

## 2. One-time Fees

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

## 3. Other Student Fees

### *Fees for Instruction Related Services:*

- Laboratory and Course Fees must be published in the institution's catalogue and/or time schedule of classes. Laboratory and Course Fees are limited to institutional sale to students of equipment, materials, or ancillary services consumed by the student as a part of course instruction where the equipment or material is not readily available for purchase through the bookstore or other external source.

Approval will not be given for Laboratory and Course Fees that constitute a charge for the use of institution owned equipment, specimens, software licenses, or other microcomputer application charges for goods or services, or other materials and supplies consumed in the instruction process, except for certain non-required physical education courses that involve use of non-state-owned facilities or expensive equipment.

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

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

### *Application Fee*

- Each institution may determine the amount of the application fee (up to \$100.00) and establish policies governing the conditions under which application fees will be required. Institutions may assess additional application fees for admission to selected programs or schools within their institution. In instances where an application is received without the Application Fee, request will be made for the Application Fee, and the fee must be received before the application will be evaluated. Application Fees are not refundable.

### *Application Fee Deferral Program*

- Institutional executives may, upon request, defer the Application Fee for first-time freshmen or transfer students who, at the time of application, are either eligible for or participate in any of the following:
  - 1) Free or reduced school lunch program;
  - 2) TRIO-type college preparatory programs (e.g., Upward Bound, Talent Search, EOC, HEP);
  - 3) State of Oregon or U.S. public assistance; and/or
  - 4) College Board fee waiver
  - 5) Foster Youth Tuition and Fee Waiver

To request an online application for Application Fee deferral, go to the following web address located at: <http://www.wou.edu/admissions/files/2015/11/2015-16-Fee-Deferral1.pdf>. The student must complete the deferral form and have it signed by a school official (high school counselor), special program official, or University official, and submit it at the time of application. Application fees deferred under this provision become payable upon the student's enrollment and receipt of financial aid funds. If a student does not complete the application process or does not enroll, the Application Fee is canceled. Students residing outside the United States at the time of their application must prove to the satisfaction of institutional officials that they would meet comparable eligibility guidelines in their country of residence.

## Post baccalaureate, Non-graduate Student Classification

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

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

Students who are admitted to an advanced degree program may convert to post baccalaureate, non-graduate student status only if the graduate degree has been awarded, if a student has been dropped from the degree program by the institution, or upon a request approved by the dean of the Graduate School for voluntary relinquishment of graduate status.

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

## Reduced Tuition Policies

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

### Approved Programmatic Student Financial Aid Programs

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

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

#### ***Diversity Programs***

##### a. WOU Educational Diversity Initiative

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

*Awards:* Rather than a prescribed allocation of funds for educational diversity fee remissions, each institution has the discretion to determine the remittance amount and allocation schedule. Campuses may make partial or full waivers based on need or to expand the number of students who receive at least some funding support. Awards are not transferable. Students may not take a tuition remission with them if they move to another public university, but will be evaluated based on the receiving school's educational diversity needs.

### ***International Cultural Service Program***

a. International Fee Remission Program

*Criteria:* This program is for undergraduate or graduate students with foreign student status.

*Awards:* Awards may vary in amount but cannot exceed the total nonresident undergraduate or graduate Enrollment Fees (Tuition, Building, Incidental, and Health Service Fees). However, the institution has the option to remit these fees if they see fit.

b. Cultural Service Program

*Criteria:* This program is for undergraduate or graduate students with foreign student status who: are competitively selected on the basis of academically meritorious achievement; and fulfill the community service requirements of the program while receiving the award.

*Awards:* Awards may vary in amount but cannot exceed the total nonresident undergraduate or graduate Enrollment Fees (Tuition and Mandatory Enrollment Fees). Remission of Mandatory Enrollment Fees is at the institution's option.

### ***International Exchanges***

a. International Oregon University Exchange Program

*Criteria:* This program is for students who are attending an Oregon public university as a part of an approved state-wide exchange program.

*Awards:* Awards may consist of remission of all or some of the Enrollment Fees, depending upon the reciprocal agreement under which the student is enrolled.

b. International Institution Exchange Program

*Criteria:* This program is for students who are attending an Oregon public university as a part of a Board-approved institution exchange program.

*Awards:* Awards may consist of remission of all or some of the Enrollment Fees, depending upon the reciprocal agreement under which the student is enrolled.

### ***Contract and Grant***

a. Contract and Grant: Academic Year

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

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

b. Contract and Grant: Summer Session

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

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

**WOU Supplemental Tuition Grant**

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

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

**VOYAGER Fee Remission**

The Voyager Tuition Assistance Program (Voyager) was implemented in the Fall of 2005 in response to a direct gubernatorial request and is intended for National Guard and Reservists who have been in an area of hostility since September 2011 (9/11).

*Criteria:* The VOYAGER fee remission is for Oregon residents who are members of the National Guard or Reserves and were deployed in an area of military combat since September 11, 2001. This fee remission is for full-time students pursuing their initial bachelor's degree. Students must submit a Free Application for Federal Student Assistance (FAFSA) annually and continue to maintain satisfactory academic progress to maintain eligibility.

*Awards:* Award is the difference between the National Guard and Reserves tuition benefit of \$4,500 and total enrollment fees. Students are responsible for securing the National Guard or Reserves tuition benefit. Duration of the VOYAGER award is four years excepting those five-year degree programs as documented in the campus general catalogs. Students may not earn more than 15 credits above the minimum number of credits required by the degree to maintain eligibility.

**Veteran's Dependent Tuition Waiver**

*Criteria:* The Veteran's Dependent tuition waiver is for qualified students accepted into a baccalaureate or master's degree program at a public university.

A qualified student is a child (includes adopted child or stepchild), spouse, or an un-remarried surviving spouse of a service member or a child of a Purple Heart recipient.

The service member is one who:

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

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

- Was relieved or discharged from service in the Armed Forces of the United States with either an honorable discharge or a general discharge under honorable conditions; and
- Was awarded the Purple Heart in 2001 or thereafter for wounds received in combat.

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

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

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

*Awards:* The award may be granted for credit hours for courses that are offered at an eligible post-secondary institution. The award does not cover other mandatory enrollment and course specific fees. The maximum waiver granted under this remission program shall be:

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

Notwithstanding sections 1 and 2 of this paragraph, a waiver may not exceed the total number of credit hours the qualified student needs to graduate with a baccalaureate or a master's degree. Transferred credit hours accepted for a degree program may or may not count toward the total credit hours needed for degree completion.

The amount of tuition waived may be reduced by the amount of any federal aid scholarships or grants, awards from the Oregon Opportunity Grant program established under ORS 348.205, or any other aid from the eligible post-secondary institution, received by the qualified student.

The amount of tuition waived may not be reduced by the amount of any Survivors' and Dependents' Educational Assistance under 38 U.S.C. Chapter 35 paid to a qualified student.

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

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

### ***Nonresident Veteran Fee Remission***

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

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

- 1) Is not an Oregon resident and:
  - a. Served in the Armed Forces of the United States;

- b. Was relieved or discharged from that service with either an honorable discharge or a general discharge under honorable conditions as shown on an original or certified copy of the student's DD-214; and
- c. Provides proof that the student has established a physical presence in Oregon within 12 months of being enrolled at one of the public universities.

OR

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

OR

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

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

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

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

- A student who served in the Armed Forces of the United States or in an international position with the state, federal government or a humanitarian aid organization *and* who receives federal tuition benefits in excess of the tuition and fees charged under this policy shall pay tuition and fees equal to the federal tuition benefits received.
- Distance education and self-support courses as identified by each public university are excluded from this discount.
- If a nonresident student is otherwise eligible for tuition benefits under this discount and receiving federal vocational rehabilitation education benefits, that student shall pay full nonresident tuition and fees charged by the enrolling public university.

*Statutory Authority: ORS 352.375*

### ***Foster Youth Tuition Waiver***

The Foster Youth Tuition and Fee Waiver originated with the passage of House Bill 3471 in the 2011 Regular Session of the Oregon Legislative Assembly and is intended to “increase access to higher education for current and former foster children by providing a Tuition and Fee Waiver” to minimize the amount of tuition

absorbed by the student. It was further amended by HB 2095 in the 2013 Regular Session to align the definition of “former foster youth” with the federal standard.

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

To qualify for the program, the student must:

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

*Awards:*

1. A qualified student for The Foster Youth Tuition and Fee Waiver is entitled to waiver of tuition and fees as noted below:
  - Tuition for academic credit courses (at base or differential rates depending upon program to which student is admitted) but not for noncredit courses.
  - Mandatory enrollment fees: building, incidental, health service, recreation center, or other mandatory fees that may be added from time to time.
  - One-time fees: matriculation.
  - Fees required for instruction related services such as lab or course fees that are assessed upon registration for a particular course.
  - The waiver excludes all fees and fines for non-instruction related services and materials such as residence hall room and board, dining services, parking fees and fines, library fines, etc. In addition, text books and other course materials not assessed as part of a course fee are also excluded. Fees considered as “pass through” fees, paid to an outside provider, are exempt from the Tuition and Fee Waiver.
2. Eligible students may receive the Foster Youth Tuition and Fee Waiver for up to 12 terms of full-time study or the equivalent. Attendance at less than full-time will be prorated accordingly.
3. If a student meets all other criteria for eligibility, but does not require the Foster Youth Tuition and Fee Waiver, the student shall remain eligible until the student receives the equivalent of 4 years of undergraduate education.

4. As noted previously, to be considered eligible for this program, the student must complete and submit a FAFSA for each academic year they are eligible for the program. Awards made under The Foster Youth Tuition and Fee Waiver shall be applied after the following:
  - Any federal Pell or Supplemental Educational Opportunity Grants (SEOG)
  - Oregon Opportunity Grant established under ORS 384.205
  - Any other gift, grant or scholarship received from the institution of higher education which may be applied to the tuition and fees covered under this program.
5. For purposes of this program, non-tuition scholarships from sources outside of the University, which pass through either OSAC or the institution, are not included in the calculation of the tuition and fee waiver award amount.

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

- A “former foster child” is defined as an individual who, for a total of six or more months while between 14 and 21 years of age, was: (a) A ward of the court pursuant to ORS 419B.100(1)(b) to (e) and in the legal custody of the Oregon Department of Human Services (or one of the nine federally recognized Tribes in Oregon) for out-of-home placement and not dismissed from care before reaching 16 years of age; or (b) An Indian child subject to the Indian Child Welfare Act (25 U.S.C. 1901 et seq.), under the jurisdiction of a tribal court for out-of-home placement and not dismissed from care before reaching 16 years of age.
- The “equivalent of four years of undergraduate education” and “equivalent of four academic years” is defined as up to 12 terms of full time study or the equivalent. Attendance at less than full-time will be prorated, accordingly.

*Statutory Authority: ORS 351.293 Tuition waiver for foster child*

## **Other Reduced Tuition Policies**

### ***Western Undergraduate Exchange***

Tuition for students admitted under the Western Undergraduate Exchange (WUE) program is assessed at 150% of the prevailing resident undergraduate tuition rate.

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

### ***Tuition Equity***

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

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

- 1) Students who are not citizens or lawful permanent residents of the United States provided the student:
  - a. During each of the three years immediately prior to receiving a high school diploma or leaving school before receiving a high school diploma, attended an elementary or a secondary school in Oregon;
  - b. During each of the five years immediately prior to receiving a high school diploma or leaving school before receiving a high school diploma, attended an elementary or a secondary school in any state or territory of the United States, the District of Columbia, or the Commonwealth of Puerto Rico;
  - c. No more than three years before initially enrolling in a public university listed in ORS 352.002 (EOU, Oregon Tech, OSU, PSU, SOU, UO, and WOU), received a high school diploma from a high school in this state or received the equivalent of a high school diploma (such as a GED); and
  - d. Shows intention to become a citizen or a lawful permanent resident of the United States by submitting to the public university the student attends or plans to attend:
    - i. An official copy of the student’s application to register with a federal immigration program or federal deportation deferral program or a statement of intent that the student will seek to obtain citizenship as permitted under federal law; and
    - ii. An affidavit stating that the student has applied for a federal individual taxpayer identification number or other official federal identification document.
- 2) Students who are financially dependent upon a person who is not a citizen or a lawful permanent resident of the United States if the student:
  - a. During each of the three years immediately prior to receiving a high school diploma or leaving school before receiving a high school diploma, attended an elementary or a secondary school in this state and resided in this state with the person upon whom the student is dependent;
  - b. During each of the five years immediately prior to receiving a high school diploma or leaving school before receiving a high school diploma, attended an elementary or a secondary school in any state or territory of the United States, the District of Columbia, or the Commonwealth of Puerto Rico and resided with the person upon whom the student is dependent;
  - c. No more than three years before initially enrolling in a public university listed in ORS 352.002 (EOU, Oregon Tech, OSU, PSU, SOU, UO, and WOU), received a high school diploma from a secondary school in this state or received the equivalent of a high school diploma; and
  - d. For a student who is not already a citizen or lawful permanent resident of the United States, shows intention to become a citizen or a lawful permanent resident of the United States by submitting to the public university the student attends or plans to attend:
    - i. An official copy of the student’s application to register with a federal immigration program or federal deportation deferral program or a statement of intent that the student will seek to obtain citizenship as permitted under federal law; and
    - ii. An affidavit stating that the student has applied for a federal individual taxpayer identification number or other official federal identification document.

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

A student who is a citizen or a lawful permanent resident of the United States and who has resided outside of Oregon for more than three years while serving in the Armed Forces of the United States, but who

otherwise meets the requirements of subsection (1) or (2) above, shall qualify for exemption from nonresident tuition and fees for enrollment in a public university listed in ORS 352.002 without having to reestablish residency in Oregon.

### ***Reduced Tuition Benefit for Academic and Classified Employees***

The academic term rate for employees is 30% of resident undergraduate tuition assessed at the teaching institution, rounded to the nearest dollar. For campuses where an undergraduate differential tuition structure is in effect, the staff fee rate will be charged at the "regular" (not differential) resident undergraduate tuition rate for both undergraduate and graduate student employees.

Charges for Building, Health Service, Recreation, Student Union, and Incidental Fees do not apply; nor are employees entitled to health services or incidental fee services through this program. No Application Fee will be required for employees and no breakage or other deposit is required when registering for classes. Other fees such as lab or course fees are assessed at the full rate and no discount is provided.

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

1. On approval of the president or designee of the teaching institution and with the concurrence of the employee's immediate supervisor, the staff fee is available to employees appointed at half-time (.5 FTE) or more (not including temporary classified employees or other student employees).
2. To qualify for this fee, the staff member must meet the criteria no later than the first day of classes of the term of enrollment. The maximum number of credits to which the staff fee may be applied is 12 credits per quarter or per semester. Some exceptions made for retired employees and employees on leave.
3. Employees enrolled for more than 12 credits in one term will pay for each additional credit at the campus designated per credit tuition rate applicable to resident undergraduate or graduate students, depending upon the employee's degree status.
4. For purposes of this rule, the term "employee" may include persons with full-time courtesy appointments who provide a benefit to the institution in the form of teaching, research, or counseling, under the direction of the institution and using the facilities of the institution.
5. Retired employees and employees on leave are eligible for staff fee privileges. Subject to the approval of the president or designee of the teaching institution, the maximum credit limitation may be waived for retired employees and for employees on leave. See exception under Senior Citizen Tuition.
6. Employees who use the staff fee for courses away from their home institution are subject to staff fee policies and procedures of the instructing institution. *There is no fee plateau at any campus for employees, family and dependents, or retired staff.*
7. Employees may be permitted to take *noncredit* courses at *one-third* of the fee assessed to other registrants. Teaching units are not required to extend staff fees for noncredit courses, self-sustaining workshops, or self-support credit courses.
8. Employees on furlough or lay-off status may be eligible for staff fees in accordance with provisions of a collective bargaining agreement.
9. No tuition shall be assessed to courses enrolled in by employees with a grading option of 'audit.' Attendance under such condition must be with the instructor's consent and on a space-available basis. Institutions are required to maintain a record of the courses audited. Courses approved for audit by the

instructor confer no credit to the student, are not charged staff fee rates or regular tuition, and may be used in addition to staff fee privileges during a term. However, any applicable course, lab or material fees associated with auditing for-credit classes will be assessed by the institution and is the responsibility of the employee. This provision cannot be subdivided in conjunction with the Employee Family Member and Domestic Partner Transfer provisions.

10. The benefit may be used at any Oregon public university.

### ***Reduced Tuition Benefit for Family Members and Domestic Partners of Employees***

To improve the recruitment and retention of high quality faculty and staff at Oregon's public universities, the staff fee policy is extended to qualified family members, eligible dependents, as well as domestic partners and their eligible dependents on a limited basis.

The academic term rate for family members is 30% of resident undergraduate tuition assessed at the teaching institution, rounded to the nearest dollar. For campuses where an undergraduate differential tuition structure is in effect, the staff fee rate will be charged at the "regular" (not differential) resident undergraduate tuition rate for both undergraduate and graduate student employees.

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

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

1. The staff fee provisions may be transferred to a qualified family member or domestic partner of employees appointed at half-time (.5 FTE) or more (not including temporary classified employees, graduate assistants, or other student employees). Employee eligibility is verified through Human Resource System records. To qualify for this fee, the family member, domestic partner, or eligible dependent must meet the criteria no later than two weeks prior to the first day of classes of the term of enrollment.
2. For purposes of this policy, the eligible family members include spouse, domestic partner, dependent children, and dependent children of domestic partners in accordance with IRS Code 152 and Section One of the Public Employees Benefit Board. If requested to do so, the employee is expected to verify family member or domestic partner eligibility by providing documented proof such as a tax return from the prior year.
3. The maximum number of transferrable credits is 12 credits per quarter or per semester. Only one staff member, spouse, domestic partner, or dependent may use the staff fee benefit per term or semester. The benefit may not be subdivided among family members during a term.
4. The qualified family member or domestic partner enrolled for more than 12 credits in one term must pay for *additional credits* at the per credit tuition rate applicable to resident undergraduate or graduate students, depending upon the family member's or domestic partner's degree status. All applicable credits will be charged at the relevant resident tuition rate.
5. The President of a public university may exclude certain programs from the policy. For a comprehensive list of excluded programs please visit the website for the Office of Human Resources.

6. The transfer of staff fee benefits is not available for retired employees.
7. Qualified family members or domestic partners of employees who use the staff fee for courses away from the employee's employing institution are subject to staff fee policies and procedures of the instructing institution. *There is no fee plateau at any campus for employees, retired staff, domestic partners, or eligible dependents.*
8. Qualified family members or domestic partners of employees may be permitted to take noncredit courses at approximately one-third of the fee assessed to other registrants. Teaching units are not required to extend staff fees for noncredit courses, self-sustaining workshops, or self-supported credit courses.
9. Eligibility of employees on furlough or lay-off status is subject to applicable collective bargaining agreements.
10. No tuition shall be assessed to courses enrolled in by employees with a grading option of 'audit.' Attendance under such condition must be with the instructor's consent and on a space-available basis. Institutions are required to maintain a record of the courses audited. Courses approved for audit by the instructor confer no credit to the student, are not charged staff fee rates or regular tuition, and may be used in addition to staff fee privileges during a term. Any applicable course, lab or material fees associated with auditing for-credit classes will be assessed by the institution and is the responsibility of the family member. This provision cannot be subdivided in conjunction with the Employee Family Member and Domestic Partner Transfer provisions.
11. The benefit may be utilized at any public university in Oregon, however; please note the *Concurrent Enrollment policy was eliminated January 1, 2004.*

### **Graduate Assistants**

Graduate students appointed by the institution and paid at established institutional salary rates as graduate teaching assistants, graduate research assistants, or graduate fellows are exempt from the payment of Tuition up to the first 16 credits per term subject to institutional policy. Appointment as an assistant may not be for less than .15 FTE for the term of appointment.

The Tuition will be assessed to the employing account or department within the institution, not to exceed the graduate resident, full-time student Tuition per term. When an assistant is authorized to exceed 16 credits per term, the institution shall charge the assistant the resident overload Tuition for the excess credits. The enrollment privilege does not apply to self-support courses.

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

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

### **Resident Oregon Senior Citizen Program**

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

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

### **Auditors**

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

### **University/School Partnership Co-Pay Program**

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

#### Earning the Co-Pay

For each permissible activity provided under contract with a cooperating district (see 'a' and 'b' below), a district earns a co-pay privilege to register any licensed educational professional employed by the district at the public university co-pay fee rate. The rate should be one-third of the tuition charged for the course. Institutions with current contractual obligations may elect to defer compliance of the rate until expiration of the existing contract.

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

- a. Supervised full-time student teaching: Co-pay privileges of 5 credit hours may be awarded for supervision of the final full-time student teaching per quarter. Student teaching is the culminating, full-time supervised teaching experience provided for students completing a program approved by the Teacher Standards and Practices Commission, leading to Initial Licensure in one or more of four authorizations: Early Childhood, Elementary, Middle, and High School; and specialty endorsements.
- b. Experiential preparatory practica or part-time student teaching: Co-pay privileges of 3 credit hours may be awarded for supervision of students in experiential preparatory practica or part-time student teaching per academic quarter. These are practica assigned to or required of the student prior to or concurrent with student teaching and block practica and/or other miscellaneous practica offered by colleges and divisions of education for students completing a program approved by the Teacher Standards and Practices Commission, leading to Initial Licensure in one or more of four authorizations: Early Childhood, Elementary, Middle, and High School; and specialty endorsements.

#### Redeeming Reduced Fee Credits

- c. Earned co-pay privileges must be used by a licensed educator professional employed by the school district within five successive academic quarters (including summer session) following the quarter in which the supervision is provided, after which time the co-pay privilege is void.
- d. The co-pay fee is applicable only up to 8 credit hours in any academic quarter for any one licensed educator professional, including summer session, even though the district may have earned two or more enrollment privileges, or if the licensed educator professional using the privilege enrolls for fewer than 8 credits.

Unused portions of an enrollment privilege may not be carried to another term or used by another teacher.

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

*Other Provisions*

- i. If a licensed educator professional using a co-pay privilege registers for 8 hours or fewer and desires the in-residence services provided by the Health Service and Incidental Fee, the licensed educator professional may elect those services by paying the appropriate fee for the number of hours enrolled. If the licensed educator professional using the co-pay privilege registers for more than 8 credit hours, the first 8 hours may be taken at the institution’s co-pay rate. Hours in excess of 8 shall be at the appropriate credit hour rate (graduate or undergraduate, resident or nonresident) and the institution shall charge all Enrollment Fees applicable to the total number of hours for which the licensed educator professional is registering.
- j. Each institution may, at its discretion, extend to the eligible district licensed educator professional other privileges such as use of the institution library, access to campus parking, and admission to campus events at faculty and staff rates, provided that such extended privileges do not exceed the benefits made available to the faculty and staff of the institution.

***Other Remission Programs***

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

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

**Fee Policies Specific to Summer Session**

- 1. Tuition rates may be assessed based on undergraduate and graduate course designation or student classification.
- 2. Course level designations are generally defined as follows:
  - a. Course numbers assigned 499 and below are assigned undergraduate fee rates.
  - b. Course numbers assigned 500 and higher are assigned graduate fee rates.
- 3. Tuition may be assessed on a per-credit hour basis or aligned to the preceding academic year structure.
- 5. Staff, qualifying family/dependents, and graduate assistant fee privileges may be authorized during the Summer Session at the option of the institution. If authorized, fees and study privileges shall conform to policies set forth in this Fee Book. Staff members or qualifying family/dependents who seek to use the staff fee privilege for courses away from their home institution are subject to corresponding fee policies

of the instructing institution.

6. Cooperating supervisors of Oregon Student Educator Professionals will be allowed to exercise contract provisions in accordance with policies set forth in this fee book. The program title is University/School Partnership Co-Pay Program.
7. Fees may be assessed during Summer Session under policies set forth in this fee book.
8. The Building Fee is assessed at \$34.00 per student as a mandatory charge to all students attending Summer Session classes, on-campus.
9. The Incidental Fee is based on recommendations and incidental fee guidelines of each institution. Summer fee rates cannot exceed the per-term amount charged during the previous academic year. The University may choose to extend incidental fee services to students not enrolled for Summer Session, under the following conditions:
  - a. A student had been enrolled in the prior academic year term and is expected to enroll in the subsequent academic year term; and
  - b. The student pays the Summer Session Incidental Fee.
11. The Health Service Fee is authorized by the WOU Board of Trustees based on institutional recommendations for the level of service to be provided during the summer. Summer fee rates cannot exceed the per term amount charged during the prior academic year. Institutions may choose to extend health services to students not enrolled for Summer Session, under the following conditions:
  - a. A student had been enrolled in the prior academic year term and is expected to enroll in the subsequent academic year term; and
  - b. The student pays the Summer Session Health Services Fee.
12. Off-campus tuition rates may be established by each institution for summer courses taught outside the campus boundaries. Mandatory fees are generally excluded from off-campus tuition rates but may be assessed when the course enrollment includes the opportunity for participation in services provided by such fees.

Special on-campus tuition rates may be established by the institution for specific short-term, on-campus instructional activities including workshops, seminars, conferences, and short courses. These activities require payment of the Building Fee. Other Mandatory Fees are assessed only if students may participate in the services provided by such fees.
13. A student enrolled in a combination of credit and audit courses will be assessed for the total hours under the tuition and fee schedule appropriate to that individual's course or student level. If enrolled for audit courses only, the student will pay the same required fees as assessed for similar hours of for-credit classes.
14. The summer refund policy for course load reduction or withdrawal may follow the rule adopted in the preceding academic year fee book or a rule adopted by the institution. The intent of this option is to provide an opportunity for institutions to apply policies better suited to management of summer programs.

## **Refunds, Waivers, and Accounts Receivable Policies**

### **A. Refund Policies**

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

### Military Duty Refund Policy

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

### **B. Waiver of Certain Student Fees**

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

### **C. Institution Authority to Adjust Charges**

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

### **D. Revolving Charge Accounts Policy**

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

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

These rules shall:

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

### **E. Interest on Overdue Accounts**

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

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

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

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

## Differential Tuition Policy

Differential tuition will be allowed in certain programs (as approved by the Board) with the understanding that: 1) an amount equal to 10% of such differential tuition for undergraduate programs be earmarked for financial aid funding targeted to low-income students majoring in the program(s) assessing differential tuition, such that this does not become an impediment to degree choice and 2) programs will need to submit the rationale for the need for differential tuition in accordance with the differential tuition policy framework outlined below.

The University may request WOU Board of Trustees approval for differential tuition at either the undergraduate or graduate level subject to the following:

1. A program considering differential tuition must develop a proposal for WOU Board of trustees consideration addressing the following criteria:
  - a. Quality of the student experience:
    - i. The proposal should address how differential tuition will substantially increase the quality of the learning experience for students and provide the basis for later opportunities that would not be possible without the differential revenues.
  - b. Access, affordability and student choice of undergraduate major:
    - i. The proposal for differential tuition for undergraduate programs must include a financial aid plan with a minimum of ten percent (10%) of the differential tuition set aside for need-based aid to be awarded to needy students enrolled in the program. The plan shall also include a college advising process that enables the student to anticipate future cost increases and (if necessary) seek additional aid to cover the differential amount over base tuition.
  - c. Cost of Instruction:
    - i. The differential tuition proposal must include a clear justification related to the variance in program cost, program demand, and program graduate earnings potential compared to the funds that would be provided through base tuition.
  - d. Market Pricing:
    - i. There should be evidence that the differential tuition proposed is comparable to the student cost for similar programs at peer institutions such that the University is not placed at a competitive disadvantage in attracting the best students and that the differential tuition is appropriate to the national market. The proposal should address the elasticity of demand in its justification.
  - e. Student Consultation and Support:
    - i. All differential tuition plans must show evidence of extensive and thorough consultation with students who will be affected, both via student representative groups and via organized opinion gathering among the students that would be charged the differential.

Increases to established differential tuition rates are not required to comply with the complete process outlined above for the proposal of new differential rates. However, rate increases that exceed the proposed increase for the institution's corresponding base rate by 2 or more percentage points will need to be supported and should address many of the same criterion listed above though not to the same degree as required for a new proposal. For undergraduate differentials, the discussion of the student consultation element and 10% set aside for need based aid must be included in submitted documentation. For example, if the proposed increase for the undergraduate resident base rate is 3.5% and the proposed increase for an undergraduate differential rate was 5.5%, additional supporting documentation would be required. For graduate programs, there may be situations

where a comparable base rate is not available. For example, the institution's graduate program rates may be separately established by program within each college or school. In those cases, proposed rate increases may be supported by an analysis of peer rates and changes in quality of student experience and cost of instruction.

# Student Shared Governance Policy

## Policy and Guidelines

### I. PURPOSE

WOU hereby endorses the concept and philosophy of shared governance between the University and its students. The following policy statement provides a framework and principles for the enactment of a campus-specific policy that sets forth the application of this principle to Western's governance structure.

### II. OBJECTIVES

- To recognize the value and importance of assuring students a voice in the educational process, particularly with respect to student life, services, and interests.
- To recognize students' rights to organize themselves and to select and recommend student representatives to the University governance structure.
- To encourage and facilitate student involvement in University decision-making.

### III. PRINCIPLES

- A. Ultimate authority for the welfare of WOU resides with the WOU Board of Trustees. The Board has delegated (and may further delegate) aspects of that authority to the President to assure efficient management of the University.
- B. Many aspects of shared governance with the faculty of WOU have a long and successful history.
- C. The intent of the current policy is to recognize the value of shared governance with its students.
- D. It is the intent of this policy to establish support for student shared governance. Accordingly, students shall have the opportunity to participate, appropriate to their special knowledge and perspective, in decisions that relate to, but are not limited to:
  - 1. Academic grading policies
  - 2. Academic disciplinary policies
  - 3. Academic courses or programs to be initiated or discontinued
  - 4. Codes of student conduct
  - 5. Curriculum development
  - 6. Institutional planning
  - 7. Selection and appointment of student services administrators
  - 8. Tuition, fees, room and board rates
  - 9. University mission and vision

### IV. IMPLEMENTATION

- A. Western Oregon University shall develop written procedures to incorporate the principles of this Board policy.
- B. Western Oregon University shall report the resulting procedures, evidence of implementation or, in the alternative, provide a report documenting how these principles of shared governance have already been incorporated into the institution's governance structure.
- C. In developing the institutional report referenced above, Western Oregon University shall ensure appropriate input from and collaboration with the officially recognized student government association. For purposes of the report on student shared governance the student government association shall be regarded as the appropriate liaison for student input.

- D. The president is charged with the responsibility of ensuring that the principles of shared governance with students are incorporated, where appropriate, throughout the University.

*Adopted by the State Board of Higher Education on April 18, 2003.*

## **Student Involvement in Development of Proposed Tuition Rates**

In June 2012, the Oregon State Legislature passed Senate Bill 242 (ORS 351.011). SB 242 included stipulations which required the Board to establish a process that incorporated student participation in tuition-setting (ORS 351.063). In response to the requirements of SB 242, the Board of Higher Education approved the following Oregon Administrative Rule on March 2, 2012.

### **Student Involvement in Development of Proposed Resident Undergraduate Tuition Rates**

(1) The Board shall establish the tuition and fees to be assessed in accordance with applicable statutes and upon the recommendation of the president. This section shall not impair the entities of student government or the Board under ORS 351.070(3)(d).

(2) The University will establish a process for student participation in the development of recommended rates for resident undergraduate tuition. The planned process will be communicated to the duly elected student government for discussion and input.

(3) Prior to the formal submission of proposed tuition rates, the institution president, or designee, will provide an opportunity for the duly elected student government to consider and comment on the proposed rates. Efforts shall be made by both the appropriate student representatives and members of the University administration to accomplish this exchange in a timely manner that 1) provides for adequate student consideration and takes into account the academic calendar and 2) allows the institution to meet necessary deadlines for submission of proposals.

(4) As part of formally submitting rate proposals to the Board, the institution president (or designee) will convey: 1) the process used by the institution to involve students in the development of recommended tuition rates and 2) the specific resident undergraduate tuition rates being proposed.

## Tuition and Fee Calculation

The Tuition & Fee Schedules included in this document provide detailed information regarding both Tuition and Fee rates on a per term basis.

### Calculating Tuition & Fees

To appropriately calculate total Tuition and Fees, the mandatory fee rates must be added to the appropriate tuition amount based on the number of intended credit hours.

For example, a student classified as a resident undergraduate with a regular major attending Western Oregon University and planning to take 15 credit hours for the term would calculate total tuition and fees as follows:

Source	Table Cell Location	Amount
WOU Undergraduate Regular Tuition Table	Resident 15 credit Hours	\$2,570.00
WOU Mandatory Fees	Undergraduate - Total Fees - 15 credit hours	\$586.00
<b>Total Tuition &amp; Fees – per term</b>		<b>\$3,156.00</b>

*Please note that the fees included in the tables in this document are mandatory fees which all campus students are required to pay. WOU may charge additional fees for specific courses (lab fees, etc.) and services (parking, etc.) Contact WOU directly for information regarding any additional fees.*

# **GLOSSARY OF TERMS**

## GLOSSARY OF TERMS COMMON TO HIGHER EDUCATION

**Academic advisement:** Each admitted student is assigned to a faculty member or a trained adviser who helps the student create and implement a plan, via regularly scheduled meetings, to attain short- and long-term academic and vocational goals.

**Admitted student:** Applicant who is offered admission to a degree-granting program at an Oregon public university.

**Applicant (first-time, first-year):** An individual who has fulfilled the institution's requirements to be considered for admission (including payment or waiving of the application fee, if any) and who has been notified of one of the following actions: admission, non-admission, placement on waiting list, or application withdrawn (by applicant or institution).

**Application fee:** That amount of money an institution charges for processing a student's application for acceptance. This amount is *not* creditable toward tuition and required fees, nor is it refundable if the student is not admitted to the institution.

**Application fee deferral:** The application fee for first-time freshmen or transfer students may be deferred for students who meet specific requirements.

**Articulation:** The process by which two or more institutions align courses and programs to ensure the smooth flow of students between campuses.

**Associate degree:** An award that normally requires at least two but less than four years of full-time equivalent college work.

**Bachelor's degree:** An award (baccalaureate or equivalent degree, as determined by the Secretary of the U.S. Department of Education) that normally requires at least four years to complete.

**Board rates (charges):** Cost for a predetermined number of meals per week: generally within a meal plan.

**Building fee:** A legislatively mandated fee, on a per term basis, to finance debt service for construction associated with student centers, health centers, and recreational facilities.

**Calendar system:** The method by which an institution structures most of its courses for the academic year.

**Career counseling:** A range of services that may include: coordination of visits of employers to campus; aptitude and vocational testing; interest inventories; personal counseling; help in résumé writing, interviewing, launching the job search; listings for those students desiring employment and those seeking permanent positions; establishment of a permanent reference folder; and career resource materials.

**Class rank:** The relative numeric position of a student in his or her graduating class, calculated on the basis of grade point average, whether weighted or un-weighted.

**Continuous basis (for program enrollment):** A calendar system classification that is used by institutions that enroll students at any time during the academic year.

**Community college transfer student:** Within the Oregon Public Universities, "transfer students" must have completed a minimum number of credits for acceptable college level work. The hours required vary among the Oregon public university campuses.

**Credit:** A unit of recognition of attendance or performance in an instructional activity (course or program) that can be applied by a recipient toward the requirements for a degree, diploma, certificate, or other formal award.

**Credit course:** A course that, if successfully completed, can be applied toward the number of courses required for achieving a degree, diploma, certificate, or other formal award.

**Credit hour:** A unit of measure representing an hour (50 minutes) of instruction over a 10-week period within a quarter system. It is usually applied toward the total number of hours needed for completing the requirements of a degree, diploma, certificate, or other formal award.

**Deferred admission:** The practice of permitting admitted students to postpone enrollment for a specific period-of-time, for example one academic term or one academic year.

**Differential tuition:** Differential tuition is defined as additional tuition that is supplementary to the base tuition level approved annually by the WOU Board of Trustees. Differential tuition is intended to 1) offset higher than average instructional costs; or 2) provide supplemental resources to enhance program quality; or 3) reflect the market for programs with high demand. *Note: Amounts included in the differential tuition schedules in this document represent the sum of the base tuition and the applicable differential amount.* WOU does not have differential tuition programs at this time.

**Degree:** An award conferred by a college, university, or other postsecondary education institution as official recognition for the successful completion of a program of studies.

**Degree-seeking students:** Students enrolled in courses for credit who are recognized by the institution as seeking a degree or formal award. At the undergraduate level, this is intended to include students enrolled in vocational or occupational programs.

**Delegation of authority:** The Oregon statutes which grant authority to the Board of Higher Education to set tuition and fee rates for Oregon Public Universities through an established rulemaking process.

**Distance education:** An option for earning course credit at off-campus locations via cable television, Internet, satellite classes, videotapes, correspondence courses, or other means.

**Doctoral degree:** The highest award a student can earn for graduate study.

**Double major:** Completion of two undergraduate programs of study simultaneously.

**Fee remission:** The fee remission is a means by which a student's fees are assessed at the prescribed tuition rate and offset by funds from some other source.

**First-time student:** A student attending any institution for the first time. Includes students enrolled in the WINTER & SPRING TERMS who attended a postsecondary institution for the first time at the same level in the prior summer term. Also includes students who entered with advanced standing (college credit earned before graduation from high school).

**First-time, first-year (freshman) student:** A student attending any institution for the first time at the undergraduate level. Includes students enrolled in the WINTER & SPRING TERMS who attended college for the first time in the prior summer term. Also includes students who entered with advanced standing (college credits earned before graduation from high school).

**Freshman:** A first-year undergraduate student.

**Freshman/new student orientation:** Orientation addressing the academic, social, emotional, and intellectual issues involved in beginning college. May be a few hours or a few days in length. There is commonly a fee associated with this program.

**Full-time student (Undergraduate):** A student enrolled for 12 or more quarter credit hours.

**Geographical residence (as an admission factor):** Special consideration in the admission process given to students from a particular region, state, or country of residence.

**Grade point average (GPA):** The sum of grade points a student has earned divided by the number of courses taken. The most common system of assigning numbers to grades counts four points for an A, three points for a B, two points for a C, one point for a D, and zero points for an I, W, P, or F.

**Graduate assistant:** Qualified students who are participating in a post-baccalaureate program and who have been appointed by an institution to assist in teaching courses.

**Graduate student:** A student who holds a bachelor's or first professional degree, or equivalent, and is taking courses at the post-baccalaureate level.

**Health services:** Low cost, on-campus, health care available to all full-time admitted students as well as part-time students who choose to exercise this option.

**Health services fee:** This fee provides for each institution's student health services, which are operated similarly to self-supported auxiliary services.

**High school diploma or recognized equivalent:** A document certifying the successful completion of a prescribed secondary school program of studies, or the attainment of satisfactory scores on the Test of General Educational Development (GED), or another state specified examination.

**Home institution:** Institution to which the student is formally admitted and matriculated in a degree program, regardless of where the student is enrolled. In the case where the student is working toward degrees from two Oregon Public Universities at the same time, either institution may be considered the *home* institution.

**Honors program:** Any special program for accomplished students offering the opportunity for educational enrichment, independent study, acceleration, or some combination of these.

**Host institution:** Institution to which the student is taking coursework necessary to complete a degree program which is unavailable at the home institution.

**Incidental fee:** This fee is assessed to provide support for student activities. Student committees make recommendations for the amount and use of the fee on each campus.

**In-state tuition:** See **Resident tuition**.

**International students:** See **Nonresident tuition**.

**Internship:** Any short-term, supervised work experience usually related to a student's major field, for which the student earns academic credit. The work can be full- or part-time, on- or off-campus, paid or unpaid.

**Mandatory enrollment fees:** Fees that are assessed to all full and part-time students as listed in the Academic Year or Summer Session Fee Books. Fees included in this category are: Building, Health Service, Incidental and Recreation Center.

**Master's degree:** An award that requires the successful completion of a program of study beyond the bachelor's degree.

**Nonresident tuition:** The tuition charged by institutions to those students who **do not** meet Oregon residency requirements.

**On-campus day care:** Licensed day care for students' children (usually age 3 and up); usually for a fee.

**Open enrollment:** Enrollment for course credits that is available to all qualified students (it is understood that enrollment in certain courses may be subject to requirements e.g., successful completion of prerequisites, grade point average, instructor's consent, etc.).

**Other expenses (costs):** Includes average costs for clothing, laundry, entertainment, medical (if not a required fee), and furnishings.

**Out-of-state tuition:** See **Nonresident tuition**.

**Part-time student (Undergraduate):** A student enrolled for 1-8 credit hours per quarter.

**Part-time fee policy:** Students enrolled under the part-time student fee policy are subject to the mandatory or course fees appropriate to specific courses taken.

**Per Term:** A term is equal to one academic quarter.

**Programmatic resource fees:** Programmatic resource fees assessed to students enrolled in specific academic programs to support extra costs associated with specialized materials, faculty, or services and equipment. These were to be eliminated effective Fall 2011.

**Public institution:** An educational institution whose programs and activities are operated by publicly elected or appointed officials, and which is supported by public funds.

**Public universities:** As defined by ORS 352.002:

- 1) University of Oregon
- 2) Oregon State University
- 3) Portland State University
- 4) Oregon Institute of Technology
- 5) Western Oregon University
- 6) Southern Oregon University
- 7) Eastern Oregon University

**Quarter calendar system:** An academic calendar system in which the instructional year consists of three academic sessions, called quarters, usually consisting of 10-12 weeks each.

**Recreation Center fee:** A fee approved by student referendum and currently applicable to Western Oregon University students.

**Required fees:** Fixed sum charged to all students for items not covered by tuition. These fees do not include fees or optional fees such as lab fees or parking fees.

**Resident tuition:** The tuition charged by institutions to those students who meet state or institutional residency requirements.

**Resource fees:** These fees include universal fees, assessed to all students and programmatic fees, assessed to students admitted only to particular academic programs.

**Summer session:** A summer session is generally shorter than a regular academic quarter and not considered part of the academic year. An institution may have 2 or more sessions occurring in the summer months.

**Tax Relief Act Reporting:** The Taxpayer *Relief Act*, enacted in 1997, provides a tax benefit deduction of interest assessed on education loans for students and their families. The *Relief Act* specifically excludes books, student health insurance, room and board, and other incidental expenses.

**Transfer applicant:** An individual who has fulfilled the institution's requirements to be considered for admission (including payment or waiving of the application fee, if any) and who has previously attended another college or university and earned college level credit.

**Transfer student:** A student entering the institution for the first time but known to have previously attended a postsecondary institution at the same level (e.g., undergraduate). The student may transfer with or without credit.

**Tuition:** Amount of money charged to students for instructional services. Tuition may be charged per term, per course, or per credit hour.

**Undergraduate:** A student enrolled in a bachelor's degree program, an associate degree program, or a vocational or technical program.

**Wait list:** List of students who meet the admission requirements but will only be offered a place in the class if space becomes available.

# WOU 2017-18 Academic Year

## Base Tuition & Promise 2017

Per Term

*Data in this table represents Tuition Costs only and does not include Mandatory Fees. The Mandatory Fee information can be found in the Mandatory Fee Tables for this institution. Instructions for calculating total tuition and fees are available beginning on page 29.*

Credits	Resident			Non-Resident	
	Undergraduate		Graduate	Undergraduate	Graduate
	Regular	Promise 2017			
<b>1</b>	176.00	204.00	399.00	531.00	671.00
<b>2</b>	347.00	403.00	798.00	1,062.00	1,342.00
<b>3</b>	518.00	602.00	1,197.00	1,593.00	2,013.00
<b>4</b>	689.00	801.00	1,596.00	2,124.00	2,684.00
<b>5</b>	860.00	1,000.00	1,995.00	2,655.00	3,355.00
<b>6</b>	1,031.00	1,199.00	2,394.00	3,186.00	4,026.00
<b>7</b>	1,202.00	1,398.00	2,793.00	3,717.00	4,697.00
<b>8</b>	1,373.00	1,597.00	3,192.00	4,248.00	5,368.00
<b>9</b>	1,544.00	1,796.00	3,591.00	4,779.00	6,039.00
<b>10</b>	1,715.00	1,995.00	3,990.00	5,310.00	6,710.00
<b>11</b>	1,886.00	2,194.00	4,389.00	5,841.00	7,381.00
<b>12</b>	2,057.00	2,393.00	4,788.00	6,372.00	8,052.00
<b>13</b>	2,228.00	2,592.00	5,187.00	6,903.00	8,723.00
<b>14</b>	2,399.00	2,791.00	5,586.00	7,434.00	9,394.00
<b>15</b>	2,570.00	2,990.00	5,985.00	7,965.00	10,065.00
<b>16</b>	2,741.00	3,189.00	6,384.00	8,496.00	10,736.00
<b>17</b>	2,912.00	3,388.00	6,783.00	9,027.00	11,407.00
<b>18</b>	3,083.00	3,587.00	7,182.00	9,558.00	12,078.00
<i>Each Add'l Credit Hour</i>	<i>171.00</i>	<i>199.00</i>	<i>399.00</i>	<i>531.00</i>	<i>671.00</i>

**Endnotes:**

- (1) A \$350 one-time undergraduate matriculation fee is assessed on all new and transfer students.
- (2) A \$300 one-time graduate matriculation fee is assessed on all new and transfer students.
- (3) Qualified tuition and fees do not include student health fees for Tax Relief Act reporting.

## WOU 2017-18 Academic Year

### Prior Year Promise Rates

Per Term

*Data in this table represents Tuition Costs only and does not include Mandatory Fees. The Mandatory Fee information can be found in the Mandatory Fee Tables for this institution. Instructions for calculating total tuition and fees are available beginning on page 29.*

Credits	Resident Promise Rates			
	Students Admitted Prior to 2017			
	2016	2015	2014	2013
<b>1</b>	186.00	174.00	170.00	166.00
<b>2</b>	367.00	346.00	338.00	330.00
<b>3</b>	548.00	518.00	506.00	494.00
<b>4</b>	729.00	690.00	674.00	658.00
<b>5</b>	910.00	862.00	842.00	822.00
<b>6</b>	1,091.00	1,034.00	1,010.00	986.00
<b>7</b>	1,272.00	1,206.00	1,178.00	1,150.00
<b>8</b>	1,453.00	1,378.00	1,346.00	1,314.00
<b>9</b>	1,634.00	1,550.00	1,514.00	1,478.00
<b>10</b>	1,815.00	1,722.00	1,682.00	1,642.00
<b>11</b>	1,996.00	1,894.00	1,850.00	1,806.00
<b>12</b>	2,177.00	2,066.00	2,018.00	1,970.00
<b>13</b>	2,358.00	2,238.00	2,186.00	2,134.00
<b>14</b>	2,539.00	2,410.00	2,354.00	2,298.00
<b>15</b>	2,720.00	2,582.00	2,522.00	2,462.00
<b>16</b>	2,901.00	2,754.00	2,690.00	2,626.00
<b>17</b>	3,082.00	2,926.00	2,858.00	2,790.00
<b>18</b>	3,263.00	3,098.00	3,026.00	2,954.00
<i>Each Add'l Credit Hour</i>	181.00	172.00	168.00	164.00
<b>Endnotes:</b>				
<i>(1) A \$350 one-time undergraduate matriculation fee is assessed on all new and transfer students.</i>				
<i>(2) A \$300 one-time graduate matriculation fee is assessed on all new and transfer students.</i>				
<i>(3) Qualified tuition and fees do not include student health fees for Tax Relief Act reporting.</i>				

## WOU 2017-18 Academic Year

### Mandatory Fees Per Term

The mandatory fees included in the following schedule are applicable to all WOU students and should be added to the applicable tuition charges (based on class-level and total credits) to determine total tuition and fees. In addition, institutions may charge additional fees for specific courses (lab fees, etc.) and services (parking, etc.) Contact the campus directly for information regarding any additional fees.

#### Western Oregon University

#### AY 2017-18 Mandatory Fees

Credits	Building		Incidental		Health Service <sup>1</sup>		Student Health Bldg Fee		Student Rec Ctr Bldg Fee		Total Fees	
	Undergrad	Graduate	Undergrad	Graduate	Undergrad	Graduate	Undergrad	Graduate	Undergrad	Graduate	Undergrad	Graduate
1	23.00	23.00	164.00	164.00			11.00	11.00	42.00	42.00	240.00	240.00
2	25.00	25.00	164.00	164.00			11.00	11.00	42.00	42.00	242.00	242.00
3	27.00	27.00	164.00	164.00			11.00	11.00	42.00	42.00	244.00	244.00
4	29.00	29.00	210.00	210.00			11.00	11.00	42.00	42.00	292.00	292.00
5	31.00	31.00	210.00	210.00			11.00	11.00	42.00	42.00	294.00	294.00
6	33.00	33.00	210.00	210.00	139.00	139.00	11.00	11.00	42.00	42.00	435.00	435.00
7	35.00	35.00	280.00	280.00	139.00	139.00	11.00	11.00	42.00	42.00	507.00	507.00
8	37.00	37.00	280.00	280.00	139.00	139.00	11.00	11.00	42.00	42.00	509.00	509.00
9	39.00	45.00	280.00	349.00	139.00	139.00	11.00	11.00	42.00	42.00	511.00	586.00
10	41.00	45.00	280.00	349.00	139.00	139.00	11.00	11.00	42.00	42.00	513.00	586.00
11	43.00	45.00	280.00	349.00	139.00	139.00	11.00	11.00	42.00	42.00	515.00	586.00
12 or more	45.00	45.00	349.00	349.00	139.00	139.00	11.00	11.00	42.00	42.00	586.00	586.00

**Endnotes:**

- (1) For credits 1-5 the Health Center Service Fee is optional and can be purchased for an additional \$131.00.
- (2) A \$350 one-time undergraduate matriculation fee is assessed on all new and transfer students.
- (3) A \$300 one-time graduate matriculation fee is assessed on all new and transfer students.
- (4) Qualified tuition and fees do not include student health fees for Tax Relief Act reporting.

# WOU Summer 2018

## Base Tuition & Promise 2017

Per Term

Data in this table represents Tuition Costs only and does not include Mandatory Fees. The Mandatory Fee information can be found in the Mandatory Fee Tables for this institution. Instructions for calculating total tuition and fees are available beginning on page 29.

Credits	Resident			Non-Resident	
	Undergraduate		Graduate	Undergraduate	Graduate
	Regular	Promise 2017			
<b>1</b>	176.00	204.00	399.00	531.00	671.00
<b>2</b>	347.00	403.00	798.00	1,062.00	1,342.00
<b>3</b>	518.00	602.00	1,197.00	1,593.00	2,013.00
<b>4</b>	689.00	801.00	1,596.00	2,124.00	2,684.00
<b>5</b>	860.00	1,000.00	1,995.00	2,655.00	3,355.00
<b>6</b>	1,031.00	1,199.00	2,394.00	3,186.00	4,026.00
<b>7</b>	1,202.00	1,398.00	2,793.00	3,717.00	4,697.00
<b>8</b>	1,373.00	1,597.00	3,192.00	4,248.00	5,368.00
<b>9</b>	1,544.00	1,796.00	3,591.00	4,779.00	6,039.00
<b>10</b>	1,715.00	1,995.00	3,990.00	5,310.00	6,710.00
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<b>18</b>	3,083.00	3,587.00	7,182.00	9,558.00	12,078.00
<i>Each Add'l Credit</i>	<i>171.00</i>	<i>199.00</i>	<i>399.00</i>	<i>531.00</i>	<i>671.00</i>

**Endnotes:**

- (1) A \$350 one-time undergraduate matriculation fee is assessed on all new and transfer
- (2) A \$300 one-time graduate matriculation fee is assessed on all new and transfer
- (3) Qualified tuition and fees do not include student health fees for Tax Relief Act reporting.

**WOU Summer 2018**

**Prior Year Promise Rates**  
Per Term

*Data in this table represents Tuition Costs only and does not include Mandatory Fees. The Mandatory Fee information can be found in the Mandatory Fee Tables for this institution. Instructions for calculating total tuition and fees are available beginning on page 29.*

Credits	Resident Promise Rates			
	Students Admitted Prior to 2017			
	2016	2015	2014	2013
<b>1</b>	186.00	174.00	170.00	166.00
<b>2</b>	367.00	346.00	338.00	330.00
<b>3</b>	548.00	518.00	506.00	494.00
<b>4</b>	729.00	690.00	674.00	658.00
<b>5</b>	910.00	862.00	842.00	822.00
<b>6</b>	1,091.00	1,034.00	1,010.00	986.00
<b>7</b>	1,272.00	1,206.00	1,178.00	1,150.00
<b>8</b>	1,453.00	1,378.00	1,346.00	1,314.00
<b>9</b>	1,634.00	1,550.00	1,514.00	1,478.00
<b>10</b>	1,815.00	1,722.00	1,682.00	1,642.00
<b>11</b>	1,996.00	1,894.00	1,850.00	1,806.00
<b>12</b>	2,177.00	2,066.00	2,018.00	1,970.00
<b>13</b>	2,358.00	2,238.00	2,186.00	2,134.00
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<b>15</b>	2,720.00	2,582.00	2,522.00	2,462.00
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<b>17</b>	3,082.00	2,926.00	2,858.00	2,790.00
<b>18</b>	3,263.00	3,098.00	3,026.00	2,954.00
<i>Each</i>	<i>181.00</i>	<i>172.00</i>	<i>168.00</i>	<i>164.00</i>
<i>Add'l</i>				
<b>Endnotes:</b>				
<i>(1) A \$350 one-time undergraduate matriculation fee is assessed on all</i>				
<i>(2) A \$300 one-time graduate matriculation fee is assessed on all new</i>				
<i>(3) Qualified tuition and fees do not include student health fees for Tax Relief Act reporting.</i>				

## WOU Summer 2018

### Mandatory Fees Per Term

The mandatory fees included in the following schedule are applicable to all WOU students and should be added to the applicable tuition charges (based on class-level and total credits) to determine total tuition and fees. In addition, institutions may charge additional fees for specific courses (lab fees, etc.) and services (parking, etc.) Contact the campus directly for information regarding any additional fees.

Credits	Building		Incidental		Health Service <sup>1</sup>		Student Health Bldg Fee		Student Rec Ctr Bldg Fee		Total Fees	
	Undergraduate	Graduate	Undergraduate	Graduate	Undergraduate	Graduate	Undergraduate	Graduate	Undergraduate	Graduate	Undergraduate	Graduate
1	34.00	34.00	153.00	153.00	0.00	0.00	11.00	11.00	35.00	35.00	233.00	233.00
2	34.00	34.00	153.00	153.00	0.00	0.00	11.00	11.00	35.00	35.00	233.00	233.00
3	34.00	34.00	153.00	153.00	0.00	0.00	11.00	11.00	35.00	35.00	233.00	233.00
4	34.00	34.00	153.00	153.00	0.00	0.00	11.00	11.00	35.00	35.00	233.00	233.00
5	34.00	34.00	153.00	153.00	0.00	0.00	11.00	11.00	35.00	35.00	233.00	233.00
6	34.00	34.00	153.00	153.00	139.00	139.00	11.00	11.00	35.00	35.00	372.00	372.00
7	34.00	34.00	153.00	153.00	139.00	139.00	11.00	11.00	35.00	35.00	372.00	372.00
8	34.00	34.00	153.00	153.00	139.00	139.00	11.00	11.00	35.00	35.00	372.00	372.00
9	34.00	34.00	153.00	153.00	139.00	139.00	11.00	11.00	35.00	35.00	372.00	372.00
10	34.00	34.00	153.00	153.00	139.00	139.00	11.00	11.00	35.00	35.00	372.00	372.00
11	34.00	34.00	153.00	153.00	139.00	139.00	11.00	11.00	35.00	35.00	372.00	372.00
12 or more	34.00	34.00	153.00	153.00	139.00	139.00	11.00	11.00	35.00	35.00	372.00	372.00

**Endnotes:**

- (1) For credits 1-5 the Health Service is optional and can be purchased for an additional \$131.
- (2) A \$350 one-time undergraduate matriculation fee is assessed on all new and transfer students.
- (3) A \$300 one-time graduate matriculation fee is assessed on all new and transfer students.
- (4) Qualified tuition and fees do not include student health insurance fees for Tax Relief Act reporting.

# Distance Education / Off Campus / Online Course Tuition and Fees

## A. Online Tuition Rates

On-Line Undergraduate courses: \$219 per credit

On-line Graduate courses: \$479 per credit, with exceptions below:

- a. Master of Arts in Interpreting Studies program, \$519 per credit

Online courses have a different tuition rate than campus courses and are NOT included in the Western Promise/Traditional rates. For example, an undergraduate student enrolled in 8 credits of regular classes and a 4 credit online course is charged regular tuition for 8 credits (Western Promise, WUE or other rates, depending on the student's tuition plan) plus the tuition for 4 credits at the online tuition rate.

If online courses are taken in combination with regular campus courses, then fees for building, incidental, student recreation center, (and health service fee if 6 hours or more) will be assessed for all credit hours combined.

Students who are taking only online courses will not be charged campus fees, but may be charged fees related to that course (such as for materials or supplies).

All WOU course credits will count toward financial aid.

## ROOM AND BOARD RATES

### WESTERN OREGON UNIVERSITY - 2017-18

<b>A. ROOM AND BOARD OVERHEAD FEES</b>					
		<b>ANNUAL</b>	<b>FALL</b>	<b>WINTER</b>	<b>SPRING</b>
<b>LANDERS</b>	Double Room (2 people/2 person room)	8148	2852	2852	2444
	Super Single (1 person/2 person room)	10055	3519	3519	3017
<b>BARNUM, BUTLER AND GENTLE</b>	Deluxe Double (2 people/3 person room)	8990	3147	3147	2696
	Triple (3 people/3 person room)	8148	2852	2852	2444
	Single (1 person/3 person room)	10474	3666	3666	3142
	Kitchenette (2 people in a kitchenette)	9176	3211	3211	2754
<b>HERITAGE AND ACKERMAN</b>	Standard Double (2 people/2 person room)	8488	2971	2971	2546
	Single (1 person/1 person room)	9425	3299	3299	2827
	Super Single (1 person/2 person standard double)	10055	3519	3519	3017
<i>Students selecting from options above must also choose a meal plan for <u>each</u> term.</i>					
<b>B. MEAL PLANS AND FEES</b>					
<b>MEAL PLANS</b>	Resident Meal Plan #1	855	285	285	285
	Resident Meal Plan #2	1320	440	440	440
	Resident Meal Plan #3	1680	560	560	560
	Resident Meal Plan #4	2055	685	685	685
	Resident Meal Plan #5	450	150	150	150
<b>C. ARBOR PARK APTS.</b>					
<b>ARBOR PARK APTS.</b>	Individual Rate for shared apt. (4 people/apt.) <i>(no meal plan included)</i>	7168	2509	2509	2150
	Individual Rate for shared apt. plus board overhead <i>(must choose meal plan from Meal Plan options above)</i>	9484	3320	3320	2844
<i>Rates for the Residence Halls and Arbor Park include data line access, wireless network, \$23.00 social activity fee/term, and \$30.00 laundry fee/term.</i>					
<i>Due to the significant increase in Cable TV costs, University Housing will not provide Cable TV in individual rooms or apartments. Cable TV will continue to be offered in community lounges in the residence halls.</i>					
<b>FACULTY, STAFF and FAMILY HOUSING</b>	<b>D. KNOX STREET-FAMILY HOUSING (does not include board plan): <u>\$675.00</u> per month</b> <i>cludes utilities, internet through Mnet Fiber (local provider), and free laundry in community area. Cable TV not included. A \$2 per month social activity fee is included in the monthly rent.</i>				
	<b>E. ALDERVIEW TOWNHOUSES (does not include board plan):</b> <b>\$900.00 per month for an interior unit or \$930.00 per month for an exterior unit</b> <i>cludes utilities and campus internet/data line and wireless access. Washer and Dryer in each unit. Cable TV not included. A \$2 per month social activity fee is included in the monthly rent.</i>				

## 2018 Summer Session Room and Board Rates

### CONFERENCE and GUEST SERVICES HOUSING RATES:

	<u>Multiple</u>	<u>Single</u>
<b>Package #1: (linen/towels provided)</b>		
a) Room w/ shared community bath	\$21.00	\$30.00
b) Room w/ private bath	\$32.00	\$45.00
c) Kitchenette w/ private bath	\$45.00	\$48.00
d) Apartment w/ shared bath & kitchen	N/A	\$45.00
<b>Package #2: (no linen/towels provided)</b>		
a) Room w/ shared bath in hallway	\$16.00	\$25.00
b) Room w/ private bath	\$27.00	\$40.00
c) Kitchenette w/ private bath	\$40.00	\$45.00

Rates listed above are based on 1 - 4 Nights Stay

Group Discount for Extended Stay (5 or more nights): 5%

Discount for Groups of 300 or More: 5%

### Other Options (minimum charges):

Linen Pack Rental = \$5.00/day (Includes mattress pad, pillow, blankets, two flat sheets, towel and washcloth)

Phone Service = arrange through Telecommunications (additional fees will apply)

Network Support = \$25.00 minimum fee if computer set-up/network support is requested

Onsite registration fee = \$100 (must be scheduled in advance)

Extended stay fee = \$25 per night in addition to nightly rate

After-hours administrative fee = \$25 per incident (including but not limited to: excessive lockouts, check-ins, check-outs)

Master key use fee = \$25 per set (fee waived for first two sets)

Deposit = varies depending on complexity of conference; nonrefundable, due May 1st or 6 weeks from the start of the event, whichever is sooner; applied to total bill

Tents/RV's=\$10 per night (with prior approval and in designated locations only)

### Each residence hall has a number of lounges available to rent. The following daily rates apply:

Ackerman Hall (15 available) = \$25/day Ackerman Shared Kitchen = \$30/day

Heritage Hall (3 available) = \$25/day Heritage Hall Inter-Community Lounge (12 available) = \$15/day Heritage Hall Conference Room = \$15/day

Barnum Hall (1 available) = \$20/day

Landers Hall (1 available) = \$25/day

Sequoia Commons = \$30/day

### SUMMER SESSION HOUSING RATES:

	<u>4 Wk Rate</u>	<u>6 Wk Rate</u>	<u>8 Wk Rate</u>
Rate for residence hall multiple room	\$350.00	\$525.00	\$700.00
Rate for Arbor Park Apartments (Arbor Park Daily Rate = \$22.50)	\$616.00	\$924.00	\$1,232.00

*Housing Rate does not include phone line - arrange telephone access through Telecommunications*

**VIP Apartment Rate**                      \$50/apartment

### SUMMER MEAL PLANS/CONFERENCE MEALS:

Valsetz Buffet Plan:

Breakfast	\$6.75
Lunch	\$8.00
Dinner	\$9.50

Discount for Groups of 100-299:                      4%

Discount for Groups over 300:                      10%

Lost Meal Card:                      \$5.00 replacement fee

### HOUSING/MEAL PLAN RATES FOR PRE-SEASON ATHLETES:

Housing Rate:                      \$9.00 per person/night or \$22.50 per person/night if outside preseason window

Meal Plan Rate:                      Breakfast: \$5.40                      Lunch: \$6.20                      Dinner: \$7.85