Education and General Fund Budget

Fiscal Year 2013

July 1, 2012 - June 30, 2013

Prepared by:

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This publication can be located online:
oregonstate.edu/budget/managementreports.htm
Table of Contents ........................................................................................................ 1

Introduction .............................................................................................................. i

Section 1: Budget Summary

Multi-Year Revenue Detail ......................................................................................... 1
FY13 Revenue Summary with Comparison to FY12 ..................................................... 2
FY13 Budget Allocation Summary Comparison to FY12 ............................................ 3
Distribution of Centrally Administered Funds .......................................................... 4
FY12-13 Initial Budget ............................................................................................... 5
FY2013 Base Budget ................................................................................................. 7
Legislative Authorized Budget-E&G, SWPS and Cascades ....................................... 8
Budgeted Operations by Unit ..................................................................................... 9

Section 2: Oregon University System (OUS) Resource Allocation Model (RAM)

Guiding Principles for 2011-2013 Allocations ......................................................... 11
Proposed FY2012-13 OUS Operating Budget .......................................................... 14
OUS-2012-13 State General Fund Detailed Appropriations ..................................... 15
2012-2013 Cell Value Calculation Methodology ..................................................... 17
OUS Cell Matrix Assignment .................................................................................... 18
Comparison of OUS RAM Distributions .................................................................. 19
Oregon State University-Comparison of 11-12 Actual and 12-13 State Appropriations 20

Section 3: Trends & Analyses

Growth in Revenues & Expenditures ....................................................................... 21
FY12 and FY13 Education & General (E&G) Fund Revenue Sources ..................... 22
Contribution Ratios for State Appropriations, Tuition & Other Revenues ............... 23
Education & General Fund State Appropriations ..................................................... 24
Net Tuition Revenue ............................................................................................... 24
Tuition Waivers & Graduate Fee Remissions .......................................................... 25
Education & General Indirect Cost Recovery ......................................................... 25
Revenues per Student FTE ....................................................................................... 26
State Appropriation per Student FTE ...................................................................... 27
Net Tuition per Student FTE .................................................................................... 27
Tuition Waivers per Student FTE ............................................................................ 27
Total Student FTE Enrollment ................................................................................ 28
Budgeted Student Head Count/FTE ....................................................................... 28
Operating Fund Balance ......................................................................................... 29
Fund Balance as Percentage of Revenue ................................................................. 29
Section 3: Trends & Analyses, Continued

Fund Balance by Unit ......................................................................................... 30
Selected Gift Fund Expenditures ....................................................................... 31
Gift Expenditures per Student FTE - Instruction .............................................. 32
Gift Expenditures per Student FTE - Scholarships ......................................... 32
Growth in Sponsored Programs Revenue .......................................................... 33
Effective Indirect Cost Recovery Rate on Sponsored Research .......................... 33
Research Awards Received ................................................................................ 33

Section 4: Tuition & Fee Schedules

Comparison of Oregon Universities - Cost of Attendance ............................... 35
OSU Cost of Attendance Increase, Room & Board Rates .............................. 35
Comparison of Undergraduate Tuition, Room & Board Rates ....................... 36
Survey of Peer Universities - UO, OSU & PSU .................................................. 37
Oregon State University, Corvallis Campus - 2012-13 Tuition & Required Fees
  Undergraduate & Graduate Tuition, Base Rates ............................................ 38
  Undergraduate & Graduate Mandatory Fees ............................................... 39
  Undergraduate, Differential Tuition: Business & Engineering .................... 40
  Undergraduate, Differential Tuition: Forestry, Apparel & Interior Design, Honors........ 41
  Graduate, Differential Tuition: Business, Engineering & Science .............. 42
  Graduate, Differential Tuition: Pharmacy & Public Health ...................... 43
  Graduate, Differential Tuition: Medical Physics & Veterinary Medicine ....... 44
Oregon State University, Cascades - 2012-13 Tuition & Required Fees
  Undergraduate & Graduate Tuition, Base Rates ............................................ 45
  Undergraduate & Graduate Mandatory Fees ............................................... 46
  Undergraduate, College of Business ......................................................... 47

Section 5: Capital Budget

Capital Projects .................................................................................................. 49
Authorized Capital Projects ............................................................................. 50
Capital Budget ................................................................................................... 51

Section 6: Other Operations

OSU Cascades
  OSU - Cascades .............................................................................................. 53
  Initial State Appropriation ............................................................................. 54
  FY13 Revenue Summary Comparison with FY12 ......................................... 55
  FY13 Budget Allocation Summary Comparison to FY12 .............................. 56
  Student FTE Enrollment ................................................................................ 57
  State Appropriation per Student FTE .............................................................. 57
  Net Tuition per Student FTE ......................................................................... 57
Section 6: Other Operations, Continued

**Statewide Public Services**
- OSU - Statewide Public Services .......................................................... 58
- Agricultural Experiment Station (AES) ....................................................... 59
- Extension Service (ES) .............................................................................. 59
- Forest Research Laboratory (FRL) .............................................................. 59
- Ratio: State Resource Expenditures to All Other Expenditures-Summary .......... 60
- Ratio: State Resource Expenditures to All Other Expenditures-AES ............... 60
- Ratio: State Resource Expenditures to All Other Expenditures-ES .................. 61
- Ratio: State Resource Expenditures to All Other Expenditures-FRL ............... 61

**Section 7: Special Topics**
- OSU - Athletics ......................................................................................... 63
- Revenue Provided to/Support Given from Education & General Fund Budget .... 64
- Ecampus Revenue Allocation Model (ERAM) ............................................. 65
- Ecampus Estimated Distribution of Revenues ............................................ 68
- Funding Sources Defined ........................................................................... 69

Students sport their tubas during an event outside the Memorial Union.
OSU Strategic Plan

Oregon State University’s Strategic Plan, updated in 2009, provides a clear focus for setting budgetary priorities. Phase II of the Strategic Plan continues the University’s ambitious drive to rank among the ten best land grant universities in the nation. This updated Plan builds on OSU’s long tradition of excellence in education, research, and outreach - and on the significant progress arising from the initial Strategic Plan and the University’s first university-wide capital campaign. OSU’s goals remain unchanged:

- Provide outstanding academic programs that further strengthen performance and pre-eminence in the three Signature Areas of Distinction: Advancing the Science of Sustainable Earth Ecosystems, Improving Human Health and Wellness, and Promoting Economic Growth and Social Progress.
- Provide an excellent teaching and learning environment and achieve student access, persistence and success through graduation and beyond that matches the best land grant universities in the country.
- Substantially increase revenues from private fundraising, partnerships, research grants, and technology transfers while strengthening our ability to more effectively invest and allocate resources to achieve success.

Phase II rests on an intensive focus on three Signature Areas of Distinction:

- Advancing the Science of Sustainable Earth Ecosystems;
- Improving Human Health and Wellness; and,
- Promoting Economic Growth and Social Progress.

All three areas build upon the University’s core teaching and research strengths, the skill and capacity of its faculty, and OSU’s many established national and international partnerships and collaborations.

The University’s Strategic Plan has guided the decision-making process through difficult financial times as state funding has declined and cost pressures have increased.

Summary

The FY2013 Education and General Budget (E&G) is up by $28.6 million or 8.3% over the FY2012 initial budget. This increase is primarily due to a $29.9 million increase in revenue from tuition and fees, net of tuition waivers, as well as a $3.2 million increase in other revenue offset by a $4.4 million decrease in state appropriation.

OSU’s State appropriation for FY2013 is down when compared to the FY2012 Initial Budget because the biennial amount was originally budgeted for a first year distribution of 54%. The biennial allocation was changed in mid-year 2012 to reflect the normal allocation split of 49%/51%, first and second years respectfully.
History and Background

Although OSU has received small increases in state funding during economic upticks, the overall trend reflects a steady decline in the percentage of state resources available to support instruction, research, and public service programs over the past two decades. Tuition increases have covered a portion of the funding losses, and the university has worked with students to hold increases to reasonable levels. OSU has also pursued a number of efforts to diversify its funding stream with significant increases in research dollars, private funds, and growth in non-resident student enrollment.

Guided by the Strategic Plan, the budget plan reflects efforts to mitigate budget reductions in academic units and add significant new investments to support strategic objectives in core academic programs, research, and student support services.

Budget Allocation and Method

In FY2007, after a two-year process of examining its E&G budget allocations, the university introduced a revised, distributed budget model. The budget review process analyzed sources and uses of funds for each academic unit, linking revenues and expenses explicitly to generating units. The budget approach has two key elements: (1) budget rebasing which established new base budgets effective fall 2006 and (2) sharing of future incremental revenue generated from tuition, state support, and indirect cost recoveries beyond the 2006-07 academic year.

In FY2013, $4.0 million has been directed to academic units experiencing enrollment growth, providing funding for new faculty hires. A total of $9.3 million were committed to fully fund mid-year raises in FY2012 and to provide mid-year adjustments in FY2013 to address compression in salaries in the professorial ranks.

FY2013 Budget

Revenue

The FY2013 budget of $371.8 million reflects an 8.3% increase over the FY2012 initial budget ($28.6 million). The total State appropriation for this fiscal year of $75.0 million is $4.4 million less than the previous year’s initial allocation.
Gross tuition and fee revenues are projected to increase by 13.7% or $33.6 million over FY2012 actual, with a resident undergraduate rate increase of 6.9%, non-resident undergraduate rate increase of 4.5%, and a graduate rate increase of 4.5%. Strong enrollment growth is anticipated for non-resident categories. Extended Campus tuition revenues are expected to increase by 23.3% ($6.5 million) over FY2012 actual, a result of continued expansion of the program.

Net tuition and fee revenues remain the largest single revenue source for OSU’s E&G fund budget at 67.3%. The percentage of state support in the E&G budget continues to decline dramatically from 50% in FY2000 to an estimated 20.2% for FY2013.

Tuition waivers are budgeted at $28.8 million, an increase of $3.4 million over FY2012 actual. OSU increased resident undergraduate tuition by 6.9% and will remit 30% of the amount to student support.

In FY2008, OSU developed a new scholarship program to complement the improvements in the Oregon Opportunity Grant made by the legislature. This program was designed to make a college education more affordable for Oregon resident students with the greatest need. Students eligible to receive both a Federal Pell Grant and an Oregon Opportunity Grant can receive a supplemental gift of aid to cover resident tuition and fees. For FY2013, OSU expects to expend $28.8 million for student support.

The indirect cost recovery (ICR) on sponsored programs is budgeted at $34.9 million, up $2.8 million from the previous year’s initial budget and approximately the same as FY2012 actual.

Departmental income and all other revenues are projected to be relatively flat compared to the prior year’s initial budget based on college and support unit projections.

Senate Bill 242 greatly strengthens the University’s ability to enhance interest revenue. SB242 also transfers several major expenses like legal and risk management covered previously by the State of Oregon. Policy and management activities are well underway to prepare for the opportunities and challenges presented by this legislation.
Expenditures

Expenses are budgeted to increase by $3.9 million over FY2012 actual to balance with anticipated total revenue of $371.8 million.

In addition to the distributable revenues or base budgets, academic and administrative units are affected by other factors such as departmental revenues, targeted legislative appropriations, organizational changes and strategic investments. Noteworthy budget changes for FY2013 compared to FY2012 include:

- An investment of $3.0 million for new faculty hires that advance our signature areas
- University Excellence Initiative - $480 thousand for four positions
- New faculty startup funding of $3.4 million
- Funds for raises of $9.3 million
- Provost Faculty Initiative Program of $500 thousand
- Reorganizations as follows:
  - Department of Geosciences and undergraduate Environmental Sciences program moved from College of Science to College of Earth, Atmospheric and Oceanic Sciences
  - Department of Science/Math Education moved from College of Science to College of Education
  - Department of Design and Human Environment moved from College of Public Health and Human Sciences to College of Business
  - Department of Graphic Design moved from College of Liberal Arts to College of Business

Outlook

Oregon State University will continue to face a great deal of financial uncertainty over the next few years as Oregon and the nation continue to weather the effects of the severe economic downturn. State revenue forecasts continue to show Oregon will have significant budgetary shortfalls in subsequent biennia as predictions for economic recovery have been delayed. The Governor’s new budget process, and effort to improve and integrate education across all levels in Oregon, will provide new dynamics and opportunities in the Legislative session that will convene in early 2013.

The financial challenges in the next biennium will be compounded by large increases in the PERS and PEBB rates. Additionally, there is a continuing need to make salary adjustments to address compression in salaries and competitiveness of our salaries with peer institutions.

This fiscal year budget continues to reflect significant investment in support of strategic objectives in research, academics, revenue, enrollment, and student access and affordability. In FY2005, the university initiated a multi-year initiative to increase non-resident enrollments, and the results over the past eight years have been very positive.

OSU’s partnership with INTO continues to bring international students into a one-year pathway program on the OSU campus, resulting in many of those students matriculating into the University. Students in this program come from over fifty countries; the most
represented countries to date are China, Saudi Arabia, South Korea and Japan. Estimated tuition revenue for 2013 is $10 million, and is distributed to colleges based on the credit hours generated by the INTO students.

In summary, OSU enters FY2013 and subsequent years facing many financial challenges but remains fiscally sound and is positioned to achieve its future program goals through diversification of future revenue sources.

Acknowledgements

The FY2013 Budget Book reflects the dedicated work of numerous individuals at OSU. While not all such contributions can be acknowledged here, I particularly wish to thank several dedicated faculty and staff whose efforts were indispensable to development of this budget plan:

Sabah Randhawa, Provost

2011-12 University Budget Committee: Jim Lundy (Chair), Anita Azarenko, Leslie Burns, Cyril Clarke, Theo Dreher, Soko Ho Sonny Eath, Rich Holdren, Milika Ieakona Hopoi, Walter Loveland, Luke McIlvenny, B. Starr McMullen, Ravi Kaimas Patel, Kate Peterson, Scott Reed and Larry Rodgers

Mark Spencer, Senior Associate Athletic Director

Jack Breen, Manager-Agricultural Sciences & Marine Sciences Business Center (AMBC)

Tom Fenske, Manager-Health Sciences Business Center (HSBC)

Luke McIlvenny, Manager-Business & Engineering Business Center (BEBC)

Mark Johnson, Manager-Arts and Sciences Business Center (AABC)

Roger Admiral, Manager-Forestry, Oceanic & Atmospheric Sciences Business Center (FOBC)

Aviva Rivera, Manager-Forestry, Oceanic & Atmospheric Sciences business Center (FOBC)

Dee Wendler, Manager-University Administration Business Center (UABC)

Christen Oien, Finance Manager-University Administration Business Center (UABC)

Sandie Franklin, Administrator-OSU Cascades

Jane Sievers, Business Manager-Facilities Services

Office of Budget & Fiscal Planning: Terri Cook, Karen Meador, Michael Hansen & Karren Cholewinski

Respectfully submitted,

Sherman Bloomer, Director
Office of Budget & Fiscal Planning
<table>
<thead>
<tr>
<th>Oregon State University Multi-Year Revenue Detail</th>
<th>FY12</th>
<th>FY13</th>
</tr>
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<tbody>
<tr>
<td><strong>Initial Budget</strong></td>
<td><strong>Actual</strong></td>
<td><strong>% VAR</strong></td>
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<tr>
<td><strong>Undergraduate</strong></td>
<td>$32,689,776</td>
<td>$32,689,775</td>
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<tr>
<td><strong>Graduate</strong></td>
<td>22,134,738</td>
<td>22,134,738</td>
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<tr>
<td><strong>Enrollment Growth Funding &amp; Retention Incentives</strong></td>
<td>-</td>
<td>796,864</td>
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<tr>
<td><strong>Technology Resource Fee</strong></td>
<td>54,824,514</td>
<td>55,621,377</td>
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<tr>
<td><strong>Extended Campus</strong></td>
<td>1,588,888</td>
<td>1,588,888</td>
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<tr>
<td><strong>OSU - Corvallis</strong></td>
<td>1,982,421</td>
<td>1,982,421</td>
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<tr>
<td><strong>Facilities Services: SWPS Buildings/Maintenance</strong></td>
<td>76,352</td>
<td>76,352</td>
</tr>
<tr>
<td><strong>Department of Justice Legal Services</strong></td>
<td>139,993</td>
<td>139,993</td>
</tr>
<tr>
<td><strong>Faculty Diversity</strong></td>
<td>47,165</td>
<td>47,165</td>
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<tr>
<td><strong>Engineering Resident Graduates</strong></td>
<td>7,204,811</td>
<td>7,204,811</td>
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<tr>
<td><strong>Engineering - ETIC</strong></td>
<td>21,064</td>
<td>21,064</td>
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<tr>
<td><strong>Engineering Tech Undergraduates</strong></td>
<td>344,642</td>
<td>344,642</td>
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<tr>
<td><strong>Signature Research Centers</strong></td>
<td>152,624</td>
<td>152,624</td>
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<tr>
<td><strong>Natural Resource Funding</strong></td>
<td>76,352</td>
<td>76,352</td>
</tr>
<tr>
<td><strong>Climate Center</strong></td>
<td>139,993</td>
<td>139,993</td>
</tr>
<tr>
<td><strong>Vet Diagnostic Lab</strong></td>
<td>291,397</td>
<td>291,397</td>
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<tr>
<td><strong>Targeted Programs</strong></td>
<td>18,267,731</td>
<td>18,267,730</td>
</tr>
<tr>
<td><strong>Revenue</strong></td>
<td>$343,180,243</td>
<td>$346,586,438</td>
</tr>
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<table>
<thead>
<tr>
<th>Oregon State University Multi-Year Revenue Detail</th>
<th>FY12</th>
<th>FY13</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Tuition Waivers</strong></td>
<td>(24,692,791)</td>
<td>(25,321,421)</td>
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<tr>
<td><strong>Tuition</strong></td>
<td>198,271,322</td>
<td>199,269,924</td>
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<tr>
<td><strong>Extended Campus</strong></td>
<td>30,656,585</td>
<td>27,836,463</td>
</tr>
<tr>
<td><strong>Summer Term</strong></td>
<td>6,500,000</td>
<td>7,546,112</td>
</tr>
<tr>
<td><strong>Subtotal - Tuition</strong></td>
<td>235,427,907</td>
<td>234,652,499</td>
</tr>
<tr>
<td><strong>Other Resources</strong></td>
<td>5,125,650</td>
<td>-</td>
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<td><strong>Subtotal - Other Resources</strong></td>
<td>9,721,234</td>
<td>10,880,273</td>
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<tr>
<td><strong>Total Revenue</strong></td>
<td>$343,180,243</td>
<td>$346,586,438</td>
</tr>
</tbody>
</table>
### Oregon State University
**FY13 Revenue Summary with Comparison to FY12**
*(thousands of dollars)*

<table>
<thead>
<tr>
<th></th>
<th>FY12 Initial Budget*</th>
<th>FY13 Initial Budget*</th>
<th>FY13 Over (Under) FY12</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$54,825</td>
<td>$57,054</td>
<td>$2,229  4.1%</td>
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<tr>
<td><strong>RAM Cell Funding</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Targeted Programs:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11-13 Regional Support</td>
<td>147</td>
<td>153</td>
<td>6  -</td>
</tr>
<tr>
<td>Facilities Services: SWPS Buildings/Maint</td>
<td>1,589</td>
<td>1,654</td>
<td>65  4.1%</td>
</tr>
<tr>
<td>Sponsored Research Support</td>
<td>1,886</td>
<td>1,963</td>
<td>77  4.1%</td>
</tr>
<tr>
<td>Research Faculty Salary Support</td>
<td>527</td>
<td>549</td>
<td>22  4.1%</td>
</tr>
<tr>
<td>Campus Public Service Programs</td>
<td>800</td>
<td>833</td>
<td>33  4.1%</td>
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<tr>
<td>Systemwide Information Technology Services</td>
<td>1,982</td>
<td>2,063</td>
<td>81  4.1%</td>
</tr>
<tr>
<td><strong>Systemwide Expenses/Programs:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Endowment Match</td>
<td>646</td>
<td>673</td>
<td>26  4.1%</td>
</tr>
<tr>
<td>Orbis</td>
<td>47</td>
<td>49</td>
<td>2  4.1%</td>
</tr>
<tr>
<td>Oregon Joint Schools of Prof Business</td>
<td>76</td>
<td>79</td>
<td>3  4.1%</td>
</tr>
<tr>
<td>Department of Justice Legal Services</td>
<td>104</td>
<td>108</td>
<td>4  4.1%</td>
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<tr>
<td>Faculty Diversity</td>
<td>59</td>
<td>62</td>
<td>2  4.1%</td>
</tr>
<tr>
<td>Services to Students with Disabilities</td>
<td>70</td>
<td>73</td>
<td>3  4.1%</td>
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<tr>
<td>Oregon Engineering Education Invest Fund</td>
<td>7,205</td>
<td>7,499</td>
<td>294  4.1%</td>
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<tr>
<td>Engineering Resident Graduates</td>
<td>1,973</td>
<td>2,020</td>
<td>47  2.4%</td>
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<tr>
<td>Engineering Tech Undergraduates</td>
<td>345</td>
<td>403</td>
<td>58  -</td>
</tr>
<tr>
<td>Signature Research Centers</td>
<td>201</td>
<td>209</td>
<td>8  4.1%</td>
</tr>
<tr>
<td>Natural Resource Funding</td>
<td>179</td>
<td>186</td>
<td>7  -</td>
</tr>
<tr>
<td>Climate Center</td>
<td>140</td>
<td>146</td>
<td>6  4.1%</td>
</tr>
<tr>
<td>Vet Diagnostic Laboratory</td>
<td>291</td>
<td>303</td>
<td>12  4.1%</td>
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<tr>
<td><strong>SUBTOTAL TARGETED PROGRAMS</strong></td>
<td>18,268</td>
<td>19,024</td>
<td>756  4.1%</td>
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<tr>
<td>Reduction for Interest Revenue</td>
<td>(1,024)</td>
<td>(1,066)</td>
<td>(42) -</td>
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<tr>
<td>Reserve-State Allocations: 54%/46% - Budget 49%/51%</td>
<td>7,354</td>
<td>(7,354)</td>
<td>-</td>
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<tr>
<td><strong>SUBTOTAL STATE APPROPRIATION</strong></td>
<td>79,422</td>
<td>75,011</td>
<td>(6,639) -8.4%</td>
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<tr>
<td><strong>Tuition:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OSU - Corvallis</td>
<td>198,271</td>
<td>224,917</td>
<td>26,645  13.4%</td>
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<tr>
<td>Extended Campus</td>
<td>30,657</td>
<td>34,335</td>
<td>3,679  12.0%</td>
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<td>Summer Term</td>
<td>6,500</td>
<td>9,550</td>
<td>3,049,876  46.9%</td>
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<tr>
<td><strong>SUBTOTAL GROSS TUITION</strong></td>
<td>235,428</td>
<td>268,802</td>
<td>33,374  14.2%</td>
</tr>
<tr>
<td>(less) Tuition Remissions</td>
<td>(24,693)</td>
<td>(28,807)</td>
<td>(4,114) 16.7%</td>
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<tr>
<td><strong>SUBTOTAL NET TUITION</strong></td>
<td>210,735</td>
<td>239,995</td>
<td>29,260  13.9%</td>
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<tr>
<td><strong>Student Fees:</strong></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Resource Fees</td>
<td>2,150</td>
<td>2,385</td>
<td>235  10.9%</td>
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<tr>
<td>Other Student Fees</td>
<td>7,571</td>
<td>7,962</td>
<td>391  5.2%</td>
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<tr>
<td><strong>SUBTOTAL RESOURCE FEES</strong></td>
<td>9,721</td>
<td>10,347</td>
<td>626  6.4%</td>
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<tr>
<td><strong>Other Revenues:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>F&amp;A Cost Recovery / Returned Overhead</td>
<td>32,200</td>
<td>34,960</td>
<td>2,760  8.6%</td>
</tr>
<tr>
<td>Sales &amp; Services / Misc Income</td>
<td>8,573</td>
<td>8,952</td>
<td>379  4.4%</td>
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<tr>
<td>Earned Interest on Accounts Receivable</td>
<td>2,529</td>
<td>2,000</td>
<td>(529) -20.9%</td>
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<tr>
<td>Debt Service Support on SELP Loans</td>
<td>550</td>
<td></td>
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<td><strong>SUBTOTAL OTHER REVENUES</strong></td>
<td>43,302</td>
<td>46,462</td>
<td>3,160  7.3%</td>
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<tr>
<td><strong>TOTAL EDUCATIONAL AND GENERAL REVENUES</strong></td>
<td>$343,180</td>
<td>$371,816</td>
<td>$28,635  8.3%</td>
</tr>
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*Excluding OSU-Cascades and Statewide Public Services

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<tr>
<th></th>
<th>FY12 Initial Budget*</th>
<th>FY13 Initial Budget*</th>
<th>FY13 Over (Under) FY12</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition:</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>OSU - Corvallis</td>
<td>198,271</td>
<td>224,917</td>
<td>26,645  13.4%</td>
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<tr>
<td>Extended Campus</td>
<td>30,657</td>
<td>34,335</td>
<td>3,679  12.0%</td>
</tr>
<tr>
<td>Summer Term</td>
<td>6,500</td>
<td>9,550</td>
<td>3,049,876  46.9%</td>
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<tr>
<td><strong>SUBTOTAL GROSS TUITION</strong></td>
<td>235,428</td>
<td>268,802</td>
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<td>(less) Tuition Remissions</td>
<td>(24,693)</td>
<td>(28,807)</td>
<td>(4,114) 16.7%</td>
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<td><strong>SUBTOTAL NET TUITION</strong></td>
<td>210,735</td>
<td>239,995</td>
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<td>Student Fees:</td>
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<td>Resource Fees</td>
<td>2,150</td>
<td>2,385</td>
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<td>Other Student Fees</td>
<td>7,571</td>
<td>7,962</td>
<td>391  5.2%</td>
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<td><strong>SUBTOTAL RESOURCE FEES</strong></td>
<td>9,721</td>
<td>10,347</td>
<td>626  6.4%</td>
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<td>Other Revenues:</td>
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<td>F&amp;A Cost Recovery / Returned Overhead</td>
<td>32,200</td>
<td>34,960</td>
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<td>Sales &amp; Services / Misc Income</td>
<td>8,573</td>
<td>8,952</td>
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<td>Earned Interest on Accounts Receivable</td>
<td>2,529</td>
<td>2,000</td>
<td>(529) -20.9%</td>
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<td>Debt Service Support on SELP Loans</td>
<td>550</td>
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<tr>
<td><strong>SUBTOTAL OTHER REVENUES</strong></td>
<td>43,302</td>
<td>46,462</td>
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<tr>
<td><strong>TOTAL EDUCATIONAL AND GENERAL REVENUES</strong></td>
<td>$343,180</td>
<td>$371,816</td>
<td>$28,635  8.3%</td>
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*Excluding OSU-Cascades and Statewide Public Services
Oregon State University
FY13 Budget Allocation Summary with Comparison to FY12
(Thousands of dollars)

<table>
<thead>
<tr>
<th>FY12 Initial Budget</th>
<th>FY13 Initial Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Base Budget</strong></td>
<td><strong>Targeted and Departmental</strong></td>
</tr>
<tr>
<td><strong>Centrally Administered Funds</strong></td>
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<tr>
<td>Pools and Reserves</td>
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<td>Distributions to Administrative Units</td>
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<td><strong>Centrally Administered Funds Total</strong></td>
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<td>Business</td>
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<td>Engineering</td>
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<td>Forestry</td>
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<td>Public Health &amp; Human Sciences</td>
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<td>Research Programs (Centers/Institutes)</td>
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<td><strong>Direct Instr and Research Delivery Total</strong></td>
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<td>Provost</td>
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<td>Academic Affairs</td>
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<td>Student Affairs</td>
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<td>Information Services</td>
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<td><strong>Service, Support, and Management Total</strong></td>
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<td><strong>Distributable Budget and Targeted Programs</strong></td>
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<td><strong>Total Budget</strong></td>
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## Distribution of Centrally Administered Funds

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<th>FY2013</th>
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<tr>
<td>Initial Budget</td>
<td>Initial Budget</td>
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<tr>
<td>Reserve-State Allocation 54%/46%</td>
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<tr>
<td>Settle-up Reserves</td>
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<tr>
<td>Technology Resource Funding</td>
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<tr>
<td>Faculty &amp; Dean Hiring</td>
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<tr>
<td>Staff, Grad, Salary raises/costs</td>
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<td>Debt Service</td>
<td>3,014,981</td>
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<td>Foundation Obligation/Capital Campaign</td>
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<tr>
<td>Access Funding</td>
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<td>External (OUS, City &amp; Other)</td>
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<td>INTO Obligation</td>
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<td>Facilities</td>
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<td>Tuition Models Central Reserves</td>
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<td>Research Investment</td>
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<td>Other</td>
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<tr>
<td>IT Investments</td>
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<td>Due from Other Funds</td>
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<tr>
<td>Internal Short-Term Loan</td>
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## FY13 Target Funding to Units

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<tr>
<th>Endowment</th>
<th>Legislative</th>
<th>OSU Targets</th>
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<tbody>
<tr>
<td>Match</td>
<td>Target</td>
<td>Diff Tuition</td>
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<tr>
<td>Agricultural Sciences</td>
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<td>$79,468</td>
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<tr>
<td>Business</td>
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<td>79,468</td>
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<td>Engineering</td>
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<tr>
<td>Public Health &amp; Human Sciences</td>
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<td>Education</td>
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<tr>
<td>Liberal Arts</td>
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<td>145,708</td>
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<td>Pharmacy</td>
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<tr>
<td>Science</td>
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<tr>
<td>Veterinary Medicine</td>
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<td>1,136,033</td>
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<tr>
<td>Honors College</td>
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<td>-</td>
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<tr>
<td>Extended Campus - Outreach &amp; Engagement</td>
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<tr>
<td>University Libraries</td>
<td>110,727</td>
<td>49,090</td>
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<tr>
<td>Research Centers &amp; Institutes</td>
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<td>185,887</td>
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<td>University Relations &amp; Mktg</td>
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<td>-</td>
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<tr>
<td>Finance &amp; Administration</td>
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<td>-</td>
</tr>
<tr>
<td>Graduate School</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Provost Pass-Thru</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Student Affairs</td>
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<td>72,846</td>
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<tr>
<td>Information Services</td>
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<tr>
<td>Total</td>
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<td>$11,996,046</td>
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1 Statewide Public Services support
<table>
<thead>
<tr>
<th>Service, Support, and Management</th>
<th>Base Budget</th>
<th>Legislatively Targeted Prog &amp; Contractual</th>
<th>Extended Campus</th>
<th>Summer Session</th>
<th>INTO</th>
<th>Student Fees Sales &amp; Service</th>
<th>Grad Fee Remissions</th>
<th>ICR</th>
<th>FY13 Initial Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pools and Reserves</strong></td>
<td>$490,255</td>
<td>$12,384,088</td>
<td>$311,905</td>
<td>$885,899</td>
<td>411,451</td>
<td>$</td>
<td>$3,519,838</td>
<td>1,937,660</td>
<td>$19,941,096</td>
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<tr>
<td><strong>Transfers to Agencies Outside OSU &amp; E&amp;G Budget</strong></td>
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<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
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</tr>
<tr>
<td><strong>Direct Instruction &amp; Research Delivery</strong></td>
<td>7,005,524</td>
<td>1,426,737</td>
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<td>355,053</td>
<td>77,179</td>
<td>442,000</td>
<td>871,470</td>
<td>2,450,000</td>
<td>14,752,659</td>
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<td>1,226,565</td>
<td>688,251</td>
<td>583,925</td>
<td>1,990,292</td>
<td>500,000</td>
<td>286,794</td>
<td>15,000</td>
<td>15,653,385</td>
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<td>10,968,598</td>
<td>410,356</td>
<td>598,095</td>
<td>1,398,146</td>
<td>494,700</td>
<td>2,793,972</td>
<td>1,700,000</td>
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<td><strong>Engineering</strong></td>
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<td>76,000</td>
<td>333,432</td>
<td>403,000</td>
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<td>76,000</td>
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<td>10,000</td>
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<td>100,000</td>
<td>86,000</td>
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<td>2,557,575</td>
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<tr>
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<td><strong>Research Equipment Reserve</strong></td>
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<td>2,366,874</td>
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<td><strong>Provost</strong></td>
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### FY12 Salary New Faculty New Faculty Reorganizations Adjustments Total Base

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Oregon State University
Legislative Authorized Education and General Budget
Education & General, Statewide Public Services and Cascades

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<th>Current Biennium - 2011-2013</th>
<th>State General &amp; Federal ARRA Funding</th>
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### Oregon State University

**Budgeted Operations by Unit**

**Fiscal Year 2013 Expenditure Budget**

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<th>Forest Research Laboratory *</th>
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*Capital Budget - see p. 51
OUS, Proposed Fiscal Year 2012-13 Operating Budget Allocations
(Excerpt from Board of Higher Education Meeting #859, August 3, 2012)

The proposed Fiscal Year 2012-13 Budget Allocation follows the guiding principles established for the 2011-2013 biennium as previously recommended by the Finance and Administrative Committee and subsequently approved by the Board at its October 7, 2011 meeting. After consideration at the Finance and Administration Committee at its June 22, 2012 meeting, the Committee is now recommending the following 2012-13 Budget Allocation to the full Board for approval.

GUIDING PRINCIPLES FOR 2011-2013 ALLOCATIONS

The proposed allocation of the 2011-2013 General Fund budget to the seven campuses, the Statewide Public Services, and the Chancellor’s Office will be in accordance with legislative directives, Board policies, and agreed-upon principles and processes as expressed in the following guiding principles:

Guiding Principles for the 2011-2013 Budget Allocation Process

1. Compliance with the OUS Board’s expectations and progress toward the Board’s priorities, including:
   - Increasing the education level of Oregon’s adults;
   - Providing high quality education;
   - Providing research for an innovative and successful Oregon; and
   - Contributing to the civic and economic success of communities throughout Oregon

2. Compliance with Legislative expectations and representations, including specific directives regarding targeted programs;

3. Focus on access to education and affordability for all qualified students, with incentives to improve retention, increase graduates, and improve student success;

4. Use of the Resource Allocation Model (RAM) to provide a basis of distributing General Fund support among campuses, including modifications to support recommendations made in the 2011-2013 Governor’s Balanced Budget to prioritize undergraduate education and graduate programs directly related to state workforce goals such as health care, engineering, and teacher education and to maintain research funding in areas that support economic development;

5. Acknowledge campus differences while striving to maintain the financial integrity of all campuses within OUS;
6. In determining the campus allocations, reserve a portion of State General Fund for regional funding to meet campus’ financial sustainability requirements as well as achievement of campus-specific board goals; and

7. If final appropriations are sufficient, reserve funds for initiatives to advance student success goals or to recognize specific campus achievements in student success.

SPECIFIC ELEMENTS OF THE PROPOSED FY 2013 ALLOCATION TO NOTE:

- This allocation represents the distribution of state appropriations of General Fund and Lottery Funds only. Institutions will be developing projections of their other revenue sources and those projections will be incorporated into the “all sources” view to be provided to the Board in August. (With the passage of Senate Bill 242 and related elimination of the expenditure limitation requirement, the “other funds” category now constitutes a revenue estimate and no longer represents a legal limitation as to when a campus can utilize those resources.)

- This allocation represents 51 percent of the 2011-2013 biennial appropriations. Senate Bill 5532, the original budget bill for the OUS biennial operating budget, allowed for expending 54 percent of the biennium budget in fiscal year 2011-12 - year 1 of the biennium. However during the February 2012 legislative session, that option was repealed and the FY 2012 allocations were reduced to 49 percent, effectively reinstating the customary state allocations of 49 percent in Year-1 and 51 percent in Year-2 of the biennium.

- In April and May, Institutional Research worked with all the institutions to refine their enrollment projections for 2012-13. This allocation utilizes those projections for the enrollment based funded. Concurrently, a “settle-up” calculation was done for 2011-12 using actual enrollment data for the summer through winter terms and with spring term estimated based on winter actual enrollment. This adjustment is netted against the 2012-13 allocations for enrollment based funding.

- Funding for Incentives for Student Success also continues, with a reserve of $3.25 million to be distributed by the Academic Strategies Committee in the fall. For FY 2012, the incentive funding was distributed according to two criteria: the total number of resident degree recipients and the number of declared underrepresented resident degree recipients plus rural resident degree recipients (for both undergraduate and graduate students). It is anticipated that the same or similar criteria will be adopted for the FY 2013 allocation.

- The special addition to regional funding that was established for 2011-2013 in both the Governor’s recommendation and the Legislatively Adopted Budget continues in this allocation.
For 2011-2013, modifications to the RAM were made to support recommendations made in the Governor’s Balanced Budget. This included prioritization of undergraduate education and graduate programs directly related to state workforce goals such as healthcare, engineering, and teacher education and to maintain research funding in areas that support economic development. In response to concerns from campus’ administration, any campus negatively impacted by the updated prioritization received transition funding in FY 2012. Transition funding continues for FY 2013. ETIC and research targeted programs, in addition to supplemental end-of-session allocations for LERC, Dispute Resolution, and Clinical Legal Education were not subject to the 3.5 percent legislative holdback.

A new allocation line was established to support those institutions who are hosting one of the Governor’s Regional Solutions Centers on their campus. Regional Solutions Centers (RSCs) are places for state agencies to collaborate with each other, with local governments, and with other public, private, and civic interests to solve problems and seize opportunities. Initially, RSCs focus on completing priority projects to bring new jobs or retain existing ones. The centers are funded by existing budgets with no increase in costs. The $12,000 per-campus is intended to defray costs associated with providing those facilities.

A General Fund reduction due to retention of interest earnings was allocated based on daily average cash balances in affected accounts from July 2009 to June 2011. Per SB 242, OUS began retaining interest earnings in January 2012 that are then allocated to the campuses based on their actual cash balances.

During the February 2012 legislative session, Sports Lottery funding was reduced by $232,960 to assist with an additional $260,577 in lottery debt service requirements. This Sports Lottery reduction was specified to be applied to the athletics portion for the University of Oregon ($118,613) and Oregon State University ($114,347) in recognition that both “are on track to experience significant increases in athletic revenues in the 2012-13 fiscal year.” At the time of the legislative action, it was anticipated that the reductions would not take effect until FY 2013 and therefore no adjustments were made to the Sports Lottery budgets for FY 2012. However, the final quarterly distribution of lottery funding from the state in FY 2012 did initiate that reduction. Therefore, lottery receipts for FY 2012 will be slightly less than budgeted and the FY 2013 lottery budget is adjusted to both reflect overall reduction for the biennium and the timing difference between the fiscal years.

COMMITTEE RECOMMENDATION TO THE BOARD

The Finance & Administration Committee approved the proposed allocation of state funding for the Fiscal Year 2012-13 on June 22, 2012 and forwards same to the full Board for approval.
<table>
<thead>
<tr>
<th>Education and General Program</th>
<th>Allocation of State Funding</th>
<th>Estimated Campus Revenues</th>
<th>Total All Funds</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>General Fund</td>
<td>Lottery Funds¹</td>
<td>E&amp;G Other Funds²</td>
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<td>EOU</td>
<td>13,358,765</td>
<td>337,750</td>
<td>20,336,385</td>
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<td>OIT</td>
<td>15,503,192</td>
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<td>22,679,823</td>
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<td>OSU - Corvallis</td>
<td>75,011,439</td>
<td>949,828</td>
<td>295,654,093</td>
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<td>OSU-Cascades</td>
<td>4,249,500</td>
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<td>4,993,015</td>
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<tr>
<td>PSU</td>
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<td>847,060</td>
<td>274,560,556</td>
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<tr>
<td>SOU</td>
<td>13,164,346</td>
<td>337,750</td>
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<td>UO</td>
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<td>WOU</td>
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<td>Industry Affairs/OMI/ETIC/Other</td>
<td>7,163,851</td>
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Subtotal Education and General Program: 248,286,350 4,226,410 1,082,838,939 1,216,122,240 2,551,473,939

Statewide Public Services:

<table>
<thead>
<tr>
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<th>Allocation of State Funding</th>
<th>Estimated Campus Revenues</th>
<th>Total All Funds</th>
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<td>Forest Research Laboratory</td>
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</table>

Subtotal Statewide Public Services: 48,427,346 22,248,899 75,300,000 145,976,245

2012-13 Total Operating Budget: 296,713,696 4,226,410 1,105,087,838 1,291,422,240 2,697,450,184


2012-13 Capital Construction⁵: -

2012-13 Total Budget: 340,133,156 11,733,179 1,105,087,838 1,397,632,185 2,854,586,358

1) SB 5702 directed specific reductions to the athletics portion of UO and OSU Sports Lottery funding:
   - Original Biennal Lottery Funding: 8,825,680
   - Less specific reductions in SB 5702:
     - UO: (118,613)
     - OSU: (114,347)
   - Less FY12 distributions: (4,366,310)
   - Available for FY13: 4,226,410

2) Education & General Other Funds include tuition and fees, indirect cost recovery on sponsored projects and lesser amounts of other income. Prior to the passage of SB 242, this category was known as Other Funds Limited (OFL) and subject to legislatively established expenditure limitation.

3) Estimates of Other Funds include designated operations, service departments, auxiliary enterprises, restricted funds (gifts, grants, contracts) and student loan funds. Prior to the passage of SB 242, this category was known as “Other Funds Non-Limited” to distinguish this source from Other Funds “Limited” which were subject to legislative expenditure limitation.

4) Includes $3.25 million incentive funding in reserve for later allocation to campuses

5) Capital has historically been reflected in the first year of the biennium. Therefore, the 2011-13 Capital Budget was reflected in 2011-12 with nothing in 2012-13.
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<tr>
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<th>EOU</th>
<th>OIT</th>
<th>OSU</th>
<th>OSU-CC</th>
<th>PSU</th>
<th>SOU</th>
<th>UO</th>
<th>WOU</th>
<th>Total Campuses</th>
<th>Operations</th>
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<td>51 IT Fifth Site/OAT/Southwest Oregon/OWEN</td>
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<td>52 Institutes / Programs</td>
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<td>53 Central Services</td>
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<td>54 System Operations</td>
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<td>55 Systemwide Expenditures</td>
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<td>56 Central Services Fund</td>
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<tr>
<td>57 Subtotal Targeted Programs</td>
<td>6,190,310</td>
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<td>60 Targeted Programs/Other</td>
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</tr>
<tr>
<td>61 Enrollment/Targeted Programs/Other</td>
<td>13,358,765</td>
<td>15,503,192</td>
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<tr>
<td>62 Debt Service</td>
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<tr>
<td>63 Total (Net Appropriation)</td>
<td>13,358,765</td>
<td>15,503,192</td>
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</tbody>
</table>

Total Enrollment & Incentive Funding: 7,420,303
Total Targeted Programs/Other: 6,096,357
### 2012-13 Cell Value Calculation Methodology

#### CELL VALUE CALCULATION METHODOLOGY

#### 2012-13 CELL VALUE

(Sample below based on level 1 non-priority cell value for lower division)

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Annual Inflation †</th>
<th>Cell Value</th>
<th>Cell Value Discounted</th>
<th>Discount Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>1997-98 (Original)</td>
<td>-</td>
<td>$2,900</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>1998-99</td>
<td>3.0%</td>
<td>$2,987</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>1999-00*</td>
<td>1.5%</td>
<td>$3,155</td>
<td>$2,789</td>
<td>87.9%</td>
</tr>
<tr>
<td>2000-01*</td>
<td>2.0%</td>
<td>$3,340</td>
<td>$2,967</td>
<td>87.9%</td>
</tr>
<tr>
<td>2001-02*</td>
<td>2.5%</td>
<td>$3,424</td>
<td>$2,509</td>
<td>73.3%</td>
</tr>
<tr>
<td>2002-03</td>
<td>2.5%</td>
<td>$3,510</td>
<td>$2,572</td>
<td>73.3%</td>
</tr>
<tr>
<td>2003-04</td>
<td>1.5%</td>
<td>$3,562</td>
<td>$2,565</td>
<td>72.0%</td>
</tr>
<tr>
<td>2004-05</td>
<td>1.5%</td>
<td>$3,616</td>
<td>$2,603</td>
<td>72.0%</td>
</tr>
<tr>
<td>2005-06</td>
<td>1.8%</td>
<td>$3,681</td>
<td>$2,150</td>
<td>58.4%</td>
</tr>
<tr>
<td>2006-07</td>
<td>0.0%</td>
<td>$3,681</td>
<td>$2,150</td>
<td>58.4%</td>
</tr>
<tr>
<td>2007-08</td>
<td>2.7%</td>
<td>$3,780</td>
<td>$2,414</td>
<td>63.9%</td>
</tr>
<tr>
<td>2008-09</td>
<td>2.7%</td>
<td>$3,882</td>
<td>$2,513</td>
<td>64.7%</td>
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<tr>
<td>2009-10</td>
<td>2.8%</td>
<td>$3,992</td>
<td>$2,167</td>
<td>54.3%</td>
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<tr>
<td>2010-11</td>
<td>1.5%</td>
<td>$4,052</td>
<td>$2,199</td>
<td>54.3%</td>
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<tr>
<td>2011-12</td>
<td>2.0%</td>
<td>$4,133</td>
<td>$1,512</td>
<td>36.6%</td>
</tr>
<tr>
<td>2012-13</td>
<td>2.9%</td>
<td>$4,253</td>
<td>$1,552</td>
<td>36.5%</td>
</tr>
</tbody>
</table>

*1999-2001 Tuition freeze factor added to undergraduate cell values: $123 in 1999-2000; $248 in 2000-2001 and thereafter. Note: in 1999-2001, the tuition freeze factor was added after inflation and discount rates were applied. For 2001-2002 forward, the tuition freeze factor is included prior to the application of inflation and applicable discount rates.

† Annual inflation rates for the years from 1998-2006 were based on factors from Oregon Dept. of Admin. Services (DAS). CPI was used for 2007-09 at a rate of 2.7% (June 2007 CPI annual increase). FY 2010 uses a 10 year average CPI rate of 2.82% (1999-2008). FY 2011 uses an inflation factor of 1.5%. CPI for 2011-12 used a rate of 2.0% (FY 2011 CPI annual increase) and 2012-13 applied a 2.9% rate (FY 2012 CPI Annual Increase).

### 2012-13 CELL VALUES AT 100%

<table>
<thead>
<tr>
<th>Level</th>
<th>Lower Division Undergraduate</th>
<th>Upper Division Undergraduate</th>
<th>Master's Graduate</th>
<th>PhD Graduate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 1</td>
<td>$4,169</td>
<td>$5,367</td>
<td>$6,788</td>
<td>$12,777</td>
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<tr>
<td>Level 2</td>
<td>$5,234</td>
<td>$6,698</td>
<td>$9,184</td>
<td>$15,306</td>
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<tr>
<td>Level 3</td>
<td>$7,497</td>
<td>$10,159</td>
<td>$13,176</td>
<td>$19,299</td>
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<tr>
<td>Pharmacy</td>
<td>$11,356</td>
<td>$11,356</td>
<td>$17,302</td>
<td>$35,936</td>
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<tr>
<td>Law</td>
<td>-</td>
<td>-</td>
<td>$14,507</td>
<td>$12,777</td>
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<tr>
<td>Vet Med</td>
<td>-</td>
<td>-</td>
<td>$50,576</td>
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</tbody>
</table>

### 2012-13 ESTABLISHED CELL VALUES DISCOUNTED

(For use in enrollment driven allocation calculation of state funds)

<table>
<thead>
<tr>
<th>Level</th>
<th>Lower Division Undergraduate</th>
<th>Upper Division Undergraduate</th>
<th>Master's Graduate</th>
<th>PhD Graduate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 1</td>
<td>$1,552</td>
<td>$1,998</td>
<td>$2,252</td>
<td>$4,240</td>
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<td>Level 1 Priority *</td>
<td>-</td>
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<td>$2,428</td>
<td>$4,570</td>
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<td>Level 2</td>
<td>$1,949</td>
<td>$2,494</td>
<td>$3,047</td>
<td>$5,079</td>
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<tr>
<td>Level 2 Priority *</td>
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<td>-</td>
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<td>$5,474</td>
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<td>Level 3</td>
<td>$2,791</td>
<td>$3,782</td>
<td>$4,372</td>
<td>$6,404</td>
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<tr>
<td>Level 3 Priority *</td>
<td>-</td>
<td>-</td>
<td>$4,713</td>
<td>$6,903</td>
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<tr>
<td>Pharmacy *</td>
<td>$4,228</td>
<td>$4,228</td>
<td>$6,189</td>
<td>$12,853</td>
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<tr>
<td>Law</td>
<td>-</td>
<td>-</td>
<td>$4,814</td>
<td>$4,240</td>
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<tr>
<td>Vet Med *</td>
<td>-</td>
<td>-</td>
<td>$18,090</td>
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</table>

* Certain fields of study were recognized as being important to the Oregon economy based on the Governor's directions for the 2011-2013 budget. Priority cell funding was provided for graduate courses taken in the following disciplines to address the Governor's directed emphasis: Engineering and Engineering-related Technology; Education; Mathematics; Computer Sciences; Biological Sciences; Life Sciences; Agricultural Sciences; Science Technologies, Physical Sciences; Health Professions and related sciences; Veterinary Medicine; and Pharmacy.
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<th>Classification of Instructional Programs (CIP)</th>
<th>Cell Level Assignments</th>
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<td>LD</td>
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<tr>
<td>01 Agricultural Business</td>
<td>3</td>
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<tr>
<td>02 Agricultural Sciences</td>
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<tr>
<td>03 Conservation</td>
<td>1</td>
</tr>
<tr>
<td>04 Architecture</td>
<td>3</td>
</tr>
<tr>
<td>05 Area, Ethnic, Cultural Studies</td>
<td>1</td>
</tr>
<tr>
<td>09 Communications</td>
<td>2</td>
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<tr>
<td>10 Communications Technologies</td>
<td>2</td>
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<tr>
<td>11 Computer and Information Science</td>
<td>2</td>
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<tr>
<td>13 Education</td>
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<tr>
<td>14 Engineering</td>
<td>3</td>
</tr>
<tr>
<td>15 Engineering-Related Technology</td>
<td>3</td>
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<tr>
<td>16 Foreign Languages and Literature</td>
<td>1</td>
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<tr>
<td>19 Home Economics</td>
<td>2</td>
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<tr>
<td>22 Law and Legal Studies</td>
<td>4</td>
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<tr>
<td>23 English Language and Literature</td>
<td>1</td>
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<tr>
<td>24 Liberal Arts and Sci., Humanities</td>
<td>1</td>
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<tr>
<td>25 Library Science</td>
<td>2</td>
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<tr>
<td>26 Biological Sciences, Life Science</td>
<td>2</td>
</tr>
<tr>
<td>27 Mathematics</td>
<td>1</td>
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<tr>
<td>28 Reserve Officers Training Corps</td>
<td>1</td>
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<tr>
<td>29 Military Technologies</td>
<td>1</td>
</tr>
<tr>
<td>30 Multi/Interdisc. Studies</td>
<td>2</td>
</tr>
<tr>
<td>31 Parks, Rec., Leisure, Fitness Studies</td>
<td>3</td>
</tr>
<tr>
<td>32 Basic Skills</td>
<td>1</td>
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<tr>
<td>38 Philosophy and Religious Studies</td>
<td>1</td>
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<td>40 Physical Sciences</td>
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<td>41 Science Technologies</td>
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<td>42 Psychology</td>
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<td>43 Protective Services</td>
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<td>44 Public Administration and Service</td>
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<td>45 Social Sciences</td>
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<td>50 Visual and Performing Arts</td>
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<td>51 Health Professions, Related Science</td>
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<tr>
<td>51.20 Pharmacy (broken out of CIP 51)</td>
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<td>51.24 Veterinary Medicine (broken out of CIP 51)</td>
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<td>52 Business Mgmt, Admin. Service</td>
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<td>54 History</td>
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<td>9999 Unknown</td>
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Comparison of OUS RAM Distributions
FY12 Actual and FY13 Initial Budget
(Percentage of Total RAM)

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<th></th>
<th>FY12 RAM %</th>
<th>FY13 RAM %</th>
<th>Difference</th>
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<tr>
<td>OSU-Corvallis</td>
<td>22.20%</td>
<td>22.05%</td>
<td>-0.1%</td>
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<tr>
<td>Statewide Public Services</td>
<td>14.17%</td>
<td>14.24%</td>
<td>0.1%</td>
</tr>
<tr>
<td>OSU-Cascades</td>
<td>1.23%</td>
<td>1.25%</td>
<td>0.0%</td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td><strong>37.6%</strong></td>
<td><strong>37.5%</strong></td>
<td><strong>-0.1%</strong></td>
</tr>
<tr>
<td>University of Oregon</td>
<td>13.32%</td>
<td>13.60%</td>
<td>0.3%</td>
</tr>
<tr>
<td>Portland State University</td>
<td>16.54%</td>
<td>15.96%</td>
<td>-0.6%</td>
</tr>
<tr>
<td>Southern Oregon University</td>
<td>3.85%</td>
<td>3.87%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Oregon Institute of Technology</td>
<td>4.56%</td>
<td>4.56%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Eastern Oregon University</td>
<td>4.01%</td>
<td>3.93%</td>
<td>-0.1%</td>
</tr>
<tr>
<td>Western Oregon University</td>
<td>4.08%</td>
<td>4.03%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Oregon University System/Other</td>
<td>16.04%</td>
<td>16.51%</td>
<td>0.5%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100.0%</strong></td>
<td><strong>100.0%</strong></td>
<td><strong>0.0%</strong></td>
</tr>
</tbody>
</table>
### Oregon State University
Comparison of FY12 Actual and FY13 State Appropriations

<table>
<thead>
<tr>
<th></th>
<th>FY12 Actual</th>
<th>FY13 Budget</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Corvallis Campus</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cell Funding</td>
<td>$55,621,377</td>
<td>$57,053,623</td>
<td>2.57%</td>
</tr>
<tr>
<td>Targeted Programs</td>
<td>18,267,730</td>
<td>19,024,059</td>
<td>4.14%</td>
</tr>
<tr>
<td>Interest Earnings</td>
<td>(1,024,430)</td>
<td>(1,066,243)</td>
<td>4.08%</td>
</tr>
<tr>
<td><strong>RAM total</strong></td>
<td>72,864,677</td>
<td>75,011,439</td>
<td>2.95%</td>
</tr>
<tr>
<td><strong>Cascades</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cell Funding</td>
<td>1,034,922</td>
<td>1,236,118</td>
<td>19.44%</td>
</tr>
<tr>
<td>Targeted Programs</td>
<td>3,014,215</td>
<td>3,013,382</td>
<td>-0.03%</td>
</tr>
<tr>
<td><strong>4,049,137</strong></td>
<td>4,249,500</td>
<td></td>
<td>4.95%</td>
</tr>
<tr>
<td><strong>Statewide Public Services (SWPS)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Agricultural Experiment Station</td>
<td>25,378,812</td>
<td>26,414,682</td>
<td>4.08%</td>
</tr>
<tr>
<td>OSU Extension Service*</td>
<td>18,357,067</td>
<td>19,106,335</td>
<td>4.08%</td>
</tr>
<tr>
<td>Forest Research Lab</td>
<td>2,792,355</td>
<td>2,906,329</td>
<td>4.08%</td>
</tr>
<tr>
<td><strong>SWPS total</strong></td>
<td>46,528,234</td>
<td>48,427,346</td>
<td>4.08%</td>
</tr>
<tr>
<td><strong>Corvallis, Cascades and SWPS totals</strong></td>
<td>$123,442,048</td>
<td>$127,688,285</td>
<td>3.44%</td>
</tr>
</tbody>
</table>
Oregon State University
Growth in Revenues and Expenditures
Fiscal Years 2004 - 2013

2004-2012 Average Trends:
Revenue: 4.3%
Expense: 4.3%
E&G Revenue: 6.4%
Oregon State University
FY12 and FY13 E&G Revenue Sources

FY13 Initial E&G Budget
Revenues = $371.8 Million

FY12 Initial E&G Budget
Revenues = $343.2 Million
Oregon State University
Contribution Ratios for State Appropriation and Tuition & Other Revenue
Fiscal Years: 2004-2012 Actual, 2013 Initial Budget

<table>
<thead>
<tr>
<th>Year</th>
<th>State Appropriation</th>
<th>Tuition &amp; Other Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>37.4%</td>
<td>62.6%</td>
</tr>
<tr>
<td>2005</td>
<td>34.7%</td>
<td>65.3%</td>
</tr>
<tr>
<td>2006</td>
<td>35.9%</td>
<td>64.1%</td>
</tr>
<tr>
<td>2007</td>
<td>35.5%</td>
<td>64.5%</td>
</tr>
<tr>
<td>2008</td>
<td>37.6%</td>
<td>62.4%</td>
</tr>
<tr>
<td>2009</td>
<td>35.2%</td>
<td>64.8%</td>
</tr>
<tr>
<td>2010</td>
<td>31.3%</td>
<td>68.7%</td>
</tr>
<tr>
<td>2011</td>
<td>28.7%</td>
<td>71.3%</td>
</tr>
<tr>
<td>2012</td>
<td>21.2%</td>
<td>78.8%</td>
</tr>
<tr>
<td>2013</td>
<td>20.2%</td>
<td>79.8%</td>
</tr>
</tbody>
</table>

Source: OSU Data Warehouse, FY13 E&G Initial Budget. Excludes Statewide Public Service and OSU-Cascades.
Oregon State University

Education and General State Appropriation
Fiscal Years: 2004 to 2012 Actual, 2013 Budget

Source: OSU Data Warehouse, FY13 E&G Initial Budget. Excludes Statewide Public Service and OSU-Cascades.

Net Tuition Revenue
Fiscal Years: 2004 to 2012 Actual, 2013 Budget

Source: OSU Data Warehouse, FY13 E&G Initial Budget. Excludes Statewide Public Service and OSU-Cascades.
FY11 and beyond tuition budget includes both undergraduate and graduate resource fees.
Net Tuition Revenue is gross tuition net of tuition waivers and graduate fee remissions.
Note: Tuition waivers reflect the financial aid given to undergraduate and graduate students from E&G resources. Recorded as a reduction in tuition revenue. Graduate tuition & fee remissions are granted to qualified graduate employees as part of their compensation package. Recorded as other payroll expense.

Source: OSU Data Warehouse, FY13 E&G Initial Budget. Excludes Statewide Public Service and OSU-Cascades.

In FY05 and years thereafter, all components of Indirect Cost Recovery are included in the E&G Budget except payments to OUS.

Source: OSU Data Warehouse, FY13 E&G Initial Budget. Excludes Statewide Public Service & OSU-Cascades.
Gross tuition revenue less remissions and increased scholarship in lieu of remissions budgeted in FY05

Source: OSU Data Warehouse, FY13 E&G Initial Budget. Excludes Statewide Public Service and OSU-Cascades.

*Gross tuition revenue less remissions and increased scholarship in lieu of remissions budgeted in FY05

Source: OSU Data Warehouse, FY13 E&G Initial Budget. Excludes Statewide Public Service and OSU-Cascades.
Tuition waivers reflect the financial aid given to undergraduate and graduate students from Education & General resources. Recorded as a reduction in tuition revenue.

Source: OSU Data Warehouse, FY13 E&G Initial Budget. Excludes Statewide Public Service and OSU-Cascades.
Oregon State University

Total Student FTE Enrollment
Fiscal Years 2004 to 2012 Actual and 2013 Budget

Source: Oregon University System Institutional Research

Oregon State University - Corvallis Campus
Student FTE
Fiscal Year 2013 Projection

<table>
<thead>
<tr>
<th></th>
<th>FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate - Fundable</td>
<td>14,152</td>
</tr>
<tr>
<td>Undergraduate - Non-fundable</td>
<td>5,232</td>
</tr>
<tr>
<td>Graduate - Fundable</td>
<td>3,070</td>
</tr>
<tr>
<td>Graduate - Non-fundable</td>
<td>953</td>
</tr>
<tr>
<td>First Professional - Fundable</td>
<td>708</td>
</tr>
<tr>
<td>First professional - Non-fundable</td>
<td>213</td>
</tr>
<tr>
<td>Total</td>
<td>24,328</td>
</tr>
</tbody>
</table>

Source: Oregon University System Institutional Research
Note: Projection from OUS is categorized as fundable (OSU receives cell funding for these students from the state) and non-fundable (OSU does not receive cell funding from the state).
Oregon State University

Operating Fund Balance*
Fiscal Years 2003 to 2012

Millions

<table>
<thead>
<tr>
<th>Year</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>2003</td>
<td>$28.7</td>
</tr>
<tr>
<td>2004</td>
<td>$38.5</td>
</tr>
<tr>
<td>2005</td>
<td>$37.7</td>
</tr>
<tr>
<td>2006</td>
<td>$27.1</td>
</tr>
<tr>
<td>2007</td>
<td>$31.0</td>
</tr>
<tr>
<td>2008</td>
<td>$48.4</td>
</tr>
<tr>
<td>2009</td>
<td>$28.0</td>
</tr>
<tr>
<td>2010</td>
<td>$65.5</td>
</tr>
<tr>
<td>2011</td>
<td>$71.0</td>
</tr>
<tr>
<td>2012</td>
<td>$47.6</td>
</tr>
</tbody>
</table>

Fund Balance as a Percentage of Revenue*
Fiscal Years 2003 to 2012

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2003</td>
<td>10.7%</td>
</tr>
<tr>
<td>2004</td>
<td>13.7%</td>
</tr>
<tr>
<td>2005</td>
<td>12.6%</td>
</tr>
<tr>
<td>2006</td>
<td>8.8%</td>
</tr>
<tr>
<td>2007</td>
<td>9.6%</td>
</tr>
<tr>
<td>2008</td>
<td>13.7%</td>
</tr>
<tr>
<td>2009</td>
<td>7.9%</td>
</tr>
<tr>
<td>2010</td>
<td>17.1%</td>
</tr>
<tr>
<td>2011</td>
<td>17.2%</td>
</tr>
<tr>
<td>2012</td>
<td>11.2%</td>
</tr>
</tbody>
</table>

* Education and General Funds, Statewide Public Service and OSU-Cascades
### Oregon State University

#### Fund Balance by Unit

<table>
<thead>
<tr>
<th>Education &amp; General Fund</th>
<th>FY11 Fund Balance</th>
<th>FY12 Fund Balance</th>
<th>FY12 Revenue</th>
<th>Carryover as a % of Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Office</td>
<td>183,675</td>
<td>7,875</td>
<td>3,873,001</td>
<td>0.2%</td>
</tr>
<tr>
<td>University Relations &amp; Marketing</td>
<td>- (2,161)</td>
<td>2,980,729</td>
<td>-0.1%</td>
<td></td>
</tr>
<tr>
<td>Provost</td>
<td>114,666</td>
<td>461,738</td>
<td>2,118,521</td>
<td>21.8%</td>
</tr>
<tr>
<td>Academic Affairs</td>
<td>1,191,421</td>
<td>1,052,253</td>
<td>5,175,274</td>
<td>20.3%</td>
</tr>
<tr>
<td>Information Services</td>
<td>2,011,296</td>
<td>(2,861,331)</td>
<td>14,656,233</td>
<td>-19.5%</td>
</tr>
<tr>
<td>Library</td>
<td>617,022</td>
<td>313,767</td>
<td>11,591,722</td>
<td>2.7%</td>
</tr>
<tr>
<td>Graduate School</td>
<td>2,136,463</td>
<td>2,745,087</td>
<td>3,726,210</td>
<td>73.7%</td>
</tr>
<tr>
<td>E-Campus (incl O&amp;E &amp; InterSess)</td>
<td>3,703,778</td>
<td>1,810,692</td>
<td>28,819,913</td>
<td>6.3%</td>
</tr>
<tr>
<td>Summer</td>
<td>524,946</td>
<td>1,051,630</td>
<td>7,546,112</td>
<td>13.9%</td>
</tr>
<tr>
<td>Extension (ROH)</td>
<td>33,317</td>
<td>34,037</td>
<td>13,864</td>
<td>245.5%</td>
</tr>
<tr>
<td>Research</td>
<td>3,971,139</td>
<td>4,282,509</td>
<td>14,066,916</td>
<td>30.4%</td>
</tr>
<tr>
<td>Student Affairs</td>
<td>2,422,440</td>
<td>2,668,751</td>
<td>13,613,587</td>
<td>19.6%</td>
</tr>
<tr>
<td>International Programs - OSU</td>
<td>680,172</td>
<td>963,035</td>
<td>2,301,651</td>
<td>41.8%</td>
</tr>
<tr>
<td>International Programs - OUS</td>
<td>525,249</td>
<td>401,474</td>
<td>2,956,424</td>
<td>13.6%</td>
</tr>
<tr>
<td>Honors</td>
<td>708,824</td>
<td>832,833</td>
<td>1,162,560</td>
<td>71.6%</td>
</tr>
<tr>
<td>Cascades</td>
<td>3,928,114</td>
<td>2,619,444</td>
<td>8,230,468</td>
<td>31.8%</td>
</tr>
<tr>
<td>Agricultural Sciences</td>
<td>3,035,331</td>
<td>4,499,753</td>
<td>17,087,649</td>
<td>26.3%</td>
</tr>
<tr>
<td>Veterinary Medicine</td>
<td>3,413,210</td>
<td>1,825,709</td>
<td>18,457,419</td>
<td>9.9%</td>
</tr>
<tr>
<td>Forestry</td>
<td>1,901,106</td>
<td>2,345,886</td>
<td>5,920,969</td>
<td>39.6%</td>
</tr>
<tr>
<td>Liberal Arts</td>
<td>3,194,722</td>
<td>4,551,655</td>
<td>34,672,152</td>
<td>13.1%</td>
</tr>
<tr>
<td>Science</td>
<td>6,343,882</td>
<td>7,374,446</td>
<td>39,902,823</td>
<td>18.5%</td>
</tr>
<tr>
<td>Oceanic &amp; Atmospheric Sciences</td>
<td>1,678,714</td>
<td>921,133</td>
<td>7,801,978</td>
<td>11.8%</td>
</tr>
<tr>
<td>Business</td>
<td>1,735,049</td>
<td>2,292,604</td>
<td>11,786,508</td>
<td>19.5%</td>
</tr>
<tr>
<td>Engineering</td>
<td>3,436,728</td>
<td>3,441,877</td>
<td>34,176,468</td>
<td>10.1%</td>
</tr>
<tr>
<td>Education</td>
<td>1,143,723</td>
<td>889,728</td>
<td>3,585,579</td>
<td>24.8%</td>
</tr>
<tr>
<td>Public Health &amp; Human Sciences</td>
<td>3,693,856</td>
<td>3,358,219</td>
<td>17,874,518</td>
<td>18.8%</td>
</tr>
<tr>
<td>Pharmacy</td>
<td>2,854,238</td>
<td>3,167,457</td>
<td>10,041,017</td>
<td>31.5%</td>
</tr>
<tr>
<td>University Business Centers</td>
<td>641,545</td>
<td>647,223</td>
<td>8,748,779</td>
<td>7.4%</td>
</tr>
<tr>
<td>Finance &amp; Administration</td>
<td>183,585</td>
<td>(1,163,291)</td>
<td>10,268,463</td>
<td>-11.3%</td>
</tr>
<tr>
<td>Facilities</td>
<td>2,947,534</td>
<td>2,531,812</td>
<td>28,371,060</td>
<td>8.9%</td>
</tr>
<tr>
<td>Capital Projects (clearing)</td>
<td>5,840,231</td>
<td>4,250,901</td>
<td>-</td>
<td>N/A</td>
</tr>
<tr>
<td>Athletics</td>
<td>440,877</td>
<td>(73)</td>
<td>10,059,123</td>
<td>0.0%</td>
</tr>
<tr>
<td>Institutional Management</td>
<td>(1,511,118)</td>
<td>(16,221,500)</td>
<td>(26,770,784)</td>
<td>60.6%</td>
</tr>
<tr>
<td><strong>Subtotal Education &amp; General</strong></td>
<td><strong>63,725,735</strong></td>
<td><strong>41,095,172</strong></td>
<td><strong>354,816,906</strong></td>
<td><strong>11.6%</strong></td>
</tr>
</tbody>
</table>

**Statewides**

<table>
<thead>
<tr>
<th>Statewides</th>
<th>FY11 Fund Balance</th>
<th>FY12 Fund Balance</th>
<th>FY12 Balance</th>
<th>Carryover as a % of Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agricultural Experiment Stateion</td>
<td>3,852,571</td>
<td>3,215,031</td>
<td>31,668,401</td>
<td>10.2%</td>
</tr>
<tr>
<td>Extension Service</td>
<td>1,787,436</td>
<td>853,982</td>
<td>29,807,234</td>
<td>2.9%</td>
</tr>
<tr>
<td>Forest Research Laboratory</td>
<td>1,595,087</td>
<td>2,390,820</td>
<td>7,100,696</td>
<td>33.7%</td>
</tr>
<tr>
<td><strong>Subtotal Statewides</strong></td>
<td><strong>7,235,094</strong></td>
<td><strong>6,459,833</strong></td>
<td><strong>68,576,331</strong></td>
<td><strong>9.4%</strong></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>70,960,829</strong></td>
<td><strong>47,555,005</strong></td>
<td><strong>423,393,237</strong></td>
<td><strong>11.2%</strong></td>
</tr>
</tbody>
</table>

1. **OSU Trademarks Royalty Fund**

2. **Statewide Federal Funds:**

<table>
<thead>
<tr>
<th>AES (Hatch &amp; Multistate)</th>
<th>FY11 Balance</th>
<th>FY12 Balance</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1,217,542</td>
<td>1,271,886</td>
<td>54,344</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Extension (Smith Lever)</th>
<th>FY11 Balance</th>
<th>FY12 Balance</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>5,877,255</td>
<td>5,736,607</td>
<td>(140,648)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FRL (McIntyre Stennis)</th>
<th>FY11 Balance</th>
<th>FY12 Balance</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>674,396</td>
<td>530,501</td>
<td>(143,895)</td>
<td></td>
</tr>
</tbody>
</table>
2005 through 2010 - Approximately $5 million was transferred each year for debt service on Reser Stadium.

Accounting change for debt service due to set up of OUS Internal Bank

SOURCE: OSU Data Warehouse; excludes physical plant.
Oregon State University

Gift Expenditures per Student FTE - Instruction
Fiscal Years 2003 to 2012

Source: OSU Data Warehouse. All instructional expenditures in FS and M funds.

Gift Expenditures per Student FTE - Scholarships
Fiscal Years 2003 to 2012

Source: OSU Data Warehouse. All scholarship expenditures in FS and M funds.
Oregon State University

Growth in Sponsored Program Revenues
Fiscal Years 2004 to 2012

Annual Percentage Change Shown

Millions

<table>
<thead>
<tr>
<th>Year</th>
<th>Direct Costs</th>
<th>Indirect Costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>6.70%</td>
<td>-3.20%</td>
</tr>
<tr>
<td>2005</td>
<td>7.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>2006</td>
<td>-2.20%</td>
<td>10.9%</td>
</tr>
<tr>
<td>2007</td>
<td>0.0%</td>
<td>8.9%</td>
</tr>
<tr>
<td>2008</td>
<td>7.2%</td>
<td>5.3%</td>
</tr>
<tr>
<td>2009</td>
<td>8.1%</td>
<td>6.2%</td>
</tr>
<tr>
<td>2010</td>
<td>14.7%</td>
<td>5.4%</td>
</tr>
<tr>
<td>2011</td>
<td>8.0%</td>
<td>-</td>
</tr>
<tr>
<td>2012</td>
<td>5.4%</td>
<td>-</td>
</tr>
</tbody>
</table>

Source: OSU Data Warehouse

Effective Indirect Cost Recovery Rate on Sponsored Research
Fiscal Years 2004 to 2012

<table>
<thead>
<tr>
<th>Year</th>
<th>Recovery Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>21.1%</td>
</tr>
<tr>
<td>2005</td>
<td>20.8%</td>
</tr>
<tr>
<td>2006</td>
<td>20.7%</td>
</tr>
<tr>
<td>2007</td>
<td>20.5%</td>
</tr>
<tr>
<td>2008</td>
<td>22.0%</td>
</tr>
<tr>
<td>2009</td>
<td>21.4%</td>
</tr>
<tr>
<td>2010</td>
<td>22.6%</td>
</tr>
<tr>
<td>2011</td>
<td>23.1%</td>
</tr>
<tr>
<td>2012</td>
<td>23.0%</td>
</tr>
</tbody>
</table>

Source: OSU Research Office

Research Awards Received
(dollars in millions)

<table>
<thead>
<tr>
<th>Year</th>
<th>Amount (in millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY2005-06</td>
<td>$151.4</td>
</tr>
<tr>
<td>FY2006-07</td>
<td>$145.0</td>
</tr>
<tr>
<td>FY2007-08</td>
<td>$164.2</td>
</tr>
<tr>
<td>FY2008-09</td>
<td>$188.9</td>
</tr>
<tr>
<td>FY2009-10</td>
<td>$213.1</td>
</tr>
<tr>
<td>FY2010-11</td>
<td>$208.0</td>
</tr>
<tr>
<td>FY2011-12</td>
<td>$207.0</td>
</tr>
</tbody>
</table>

Source: OSU Research Office
### Oregon Colleges and Universities - Cost of Attendance

**Tuition & Fees/Room & Board Increases, FY 2012 - FY 2013**

**Resident Undergraduates - Based on 12 Credit Hours**

The following table summarizes the cost of attendance for OUS schools in the state. Cost of attendance consists of tuition, student fees, and room and board. The average change in the cost of attendance is $15,801, a 3.2% increase.

For Oregon State University, there is a $472 increase, which is a 2.7% increase in cost of attendance.

<table>
<thead>
<tr>
<th>School</th>
<th>Total FY 2012</th>
<th>Total FY 2013</th>
<th>$ Change FY12-FY13</th>
<th>%Change FY12-FY13</th>
</tr>
</thead>
<tbody>
<tr>
<td>EOU</td>
<td>14,025</td>
<td>14,504</td>
<td>479</td>
<td>3.4%</td>
</tr>
<tr>
<td>OIT</td>
<td>14,382</td>
<td>15,200</td>
<td>818</td>
<td>5.7%</td>
</tr>
<tr>
<td>OSU</td>
<td>17,337</td>
<td>17,809</td>
<td>472</td>
<td>2.7%</td>
</tr>
<tr>
<td>PSU</td>
<td>14,628</td>
<td>14,739</td>
<td>111</td>
<td>0.8%</td>
</tr>
<tr>
<td>SOU</td>
<td>15,174</td>
<td>15,752</td>
<td>578</td>
<td>3.8%</td>
</tr>
<tr>
<td>UO</td>
<td>16,779</td>
<td>17,647</td>
<td>868</td>
<td>5.2%</td>
</tr>
<tr>
<td>WOU</td>
<td>14,809</td>
<td>14,954</td>
<td>145</td>
<td>1.0%</td>
</tr>
<tr>
<td>Averages</td>
<td>15,305</td>
<td>15,801</td>
<td>496</td>
<td>3.2%</td>
</tr>
</tbody>
</table>

**Oregon State University**

**Cost of Attendance Increase**

**Based on Tuitions & Fees/Room & Board**

**FY 2012 - FY 2013**

The tables below represent the cost of attendance for undergraduate students, both in-state and out-of-state. These are representative of students taking 12 credits and living on campus. For in-state undergraduate students, the increase in cost of attendance from FY12 to FY13 is $572 (3.3 % increase).

For out-of-state undergraduates, the increase in cost of attendance is $1,040 (3.4% increase).

<table>
<thead>
<tr>
<th>In-State Undergraduate</th>
<th>Total 2011-12</th>
<th>Total 2012-13</th>
<th>$ Change FY12-FY13</th>
<th>% Change FY12-FY13</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition</td>
<td>6,228.00</td>
<td>6,660.00</td>
<td>432.00</td>
<td>6.9%</td>
</tr>
<tr>
<td>Fees</td>
<td>1,371.00</td>
<td>1,478.00</td>
<td>107.00</td>
<td>7.8%</td>
</tr>
<tr>
<td>Room &amp; Board</td>
<td>9,638.00</td>
<td>9,671.00</td>
<td>33.00</td>
<td>0.3%</td>
</tr>
<tr>
<td>Total</td>
<td>17,237.00</td>
<td>17,809.00</td>
<td>572.00</td>
<td>3.3%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Out-of-State Undergraduate</th>
<th>Total 2011-12</th>
<th>Total 2012-13</th>
<th>$ Change FY12-FY13</th>
<th>% Change FY12-FY13</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition</td>
<td>19,944.00</td>
<td>20,844.00</td>
<td>900.00</td>
<td>4.5%</td>
</tr>
<tr>
<td>Fees</td>
<td>1,371.00</td>
<td>1,478.00</td>
<td>107.00</td>
<td>7.8%</td>
</tr>
<tr>
<td>Room &amp; Board</td>
<td>9,638.00</td>
<td>9,671.00</td>
<td>33.00</td>
<td>0.3%</td>
</tr>
<tr>
<td>Total</td>
<td>30,953.00</td>
<td>31,993.00</td>
<td>1,040.00</td>
<td>3.4%</td>
</tr>
</tbody>
</table>

Source: Oregon State Board of Higher Education, OUS Academic Year Fee Books, Fiscal Years 2011 & 2012 and OSU Housing & Dining website
### Comparison of Undergraduate Tuition, Fees and Room & Board Rates

#### OSU Competitor Universities with Undergraduate Admissions Overlap

**Fiscal Years 2012-2013**

#### Total Tuition, Fees, Room & Board

<table>
<thead>
<tr>
<th>Resident Undergraduate</th>
<th>2011-2012</th>
<th>2012-2013</th>
<th>% Chg</th>
<th>Non-resident Undergraduate</th>
<th>2011-2012</th>
<th>2012-2013</th>
<th>% Chg</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cornell University</td>
<td>38,295</td>
<td>40,675</td>
<td>6.2%</td>
<td>Cornell University</td>
<td>54,435</td>
<td>56,815</td>
<td>4.4%</td>
</tr>
<tr>
<td>UC Davis</td>
<td>27,280</td>
<td>28,047</td>
<td>2.8%</td>
<td>UC Davis</td>
<td>50,158</td>
<td>50,925</td>
<td>1.5%</td>
</tr>
<tr>
<td>Pennsylvania State University</td>
<td>23,574</td>
<td>24,262</td>
<td>2.9%</td>
<td>Purdue University</td>
<td>36,896</td>
<td>38,001</td>
<td>3.0%</td>
</tr>
<tr>
<td>University of Illinois</td>
<td>20,572</td>
<td>21,648</td>
<td>5.2%</td>
<td>Pennsylvania State University</td>
<td>35,656</td>
<td>36,564</td>
<td>2.5%</td>
</tr>
<tr>
<td>Ohio State University</td>
<td>19,500</td>
<td>20,406</td>
<td>4.6%</td>
<td>Ohio State University</td>
<td>34,395</td>
<td>35,814</td>
<td>4.1%</td>
</tr>
<tr>
<td>Purdue University</td>
<td>18,728</td>
<td>19,199</td>
<td>2.5%</td>
<td>University of Illinois</td>
<td>34,714</td>
<td>35,790</td>
<td>3.1%</td>
</tr>
<tr>
<td>University of Arizona</td>
<td>18,582</td>
<td>18,671</td>
<td>0.5%</td>
<td>University of Arizona</td>
<td>34,041</td>
<td>34,867</td>
<td>2.4%</td>
</tr>
<tr>
<td>Michigan State University</td>
<td>17,968</td>
<td>18,574</td>
<td>3.4%</td>
<td>Michigan State University</td>
<td>33,145</td>
<td>34,658</td>
<td>4.6%</td>
</tr>
<tr>
<td>University of Wisconsin</td>
<td>17,395</td>
<td>17,648</td>
<td>1.5%</td>
<td>University of Wisconsin</td>
<td>33,124</td>
<td>34,540</td>
<td>4.3%</td>
</tr>
<tr>
<td>Colorado State University</td>
<td>16,788</td>
<td>17,992</td>
<td>7.2%</td>
<td>Colorado State University</td>
<td>32,488</td>
<td>33,715</td>
<td>3.8%</td>
</tr>
<tr>
<td>Oregon State University</td>
<td>17,237</td>
<td>17,809</td>
<td>3.3%</td>
<td>Oregon State University</td>
<td>30,953</td>
<td>31,993</td>
<td>3.4%</td>
</tr>
<tr>
<td>Texas A&amp;M University</td>
<td>16,317</td>
<td>16,678</td>
<td>2.2%</td>
<td>Texas A&amp;M University</td>
<td>31,707</td>
<td>33,208</td>
<td>4.7%</td>
</tr>
<tr>
<td>Iowa State University</td>
<td>15,107</td>
<td>15,447</td>
<td>2.3%</td>
<td>N. Carolina State University</td>
<td>26,146</td>
<td>28,112</td>
<td>4.5%</td>
</tr>
<tr>
<td>N. Carolina State University</td>
<td>14,128</td>
<td>15,248</td>
<td>7.9%</td>
<td>Iowa State University</td>
<td>25,979</td>
<td>27,559</td>
<td>2.1%</td>
</tr>
</tbody>
</table>

#### Tuition and Fees - Based on 12 credit hours

<table>
<thead>
<tr>
<th>Resident Undergraduate</th>
<th>2010-2011</th>
<th>2011-2012</th>
<th>% Chg</th>
<th>Non-resident Undergraduate</th>
<th>2011-2012</th>
<th>2012-2013</th>
<th>% Chg</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cornell University</td>
<td>25,185</td>
<td>27,045</td>
<td>7.4%</td>
<td>Cornell University</td>
<td>41,325</td>
<td>43,185</td>
<td>4.5%</td>
</tr>
<tr>
<td>Pennsylvania State University</td>
<td>15,124</td>
<td>15,562</td>
<td>2.9%</td>
<td>UC Davis</td>
<td>38,001</td>
<td>38,135</td>
<td>0.4%</td>
</tr>
<tr>
<td>UC Davis</td>
<td>15,123</td>
<td>15,562</td>
<td>2.9%</td>
<td>Pennsylvania State University</td>
<td>27,206</td>
<td>27,864</td>
<td>2.4%</td>
</tr>
<tr>
<td>University of Illinois</td>
<td>11,104</td>
<td>11,636</td>
<td>4.8%</td>
<td>University of Wisconsin</td>
<td>25,421</td>
<td>26,634</td>
<td>4.8%</td>
</tr>
<tr>
<td>University of Wisconsin</td>
<td>9,671</td>
<td>10,384</td>
<td>7.4%</td>
<td>University of Wisconsin</td>
<td>25,421</td>
<td>26,634</td>
<td>4.8%</td>
</tr>
<tr>
<td>Michigan State University</td>
<td>9,814</td>
<td>10,098</td>
<td>2.9%</td>
<td>Michigan State University</td>
<td>24,970</td>
<td>26,064</td>
<td>4.4%</td>
</tr>
<tr>
<td>Ohio State University</td>
<td>9,735</td>
<td>10,036</td>
<td>3.1%</td>
<td>Colorado State University</td>
<td>23,652</td>
<td>24,351</td>
<td>3.0%</td>
</tr>
<tr>
<td>University of Arizona</td>
<td>10,035</td>
<td>10,357</td>
<td>3.1%</td>
<td>Oregon State University</td>
<td>21,315</td>
<td>22,322</td>
<td>4.7%</td>
</tr>
<tr>
<td>Purdue University</td>
<td>9,478</td>
<td>9,900</td>
<td>4.5%</td>
<td>Oregon State University</td>
<td>19,853</td>
<td>20,952</td>
<td>5.5%</td>
</tr>
<tr>
<td>Colorado State University</td>
<td>7,952</td>
<td>8,558</td>
<td>7.6%</td>
<td>Iowa State University</td>
<td>19,358</td>
<td>19,838</td>
<td>2.5%</td>
</tr>
<tr>
<td>Texas A&amp;M University</td>
<td>8,419</td>
<td>8,506</td>
<td>1.0%</td>
<td>Iowa State University</td>
<td>19,358</td>
<td>19,838</td>
<td>2.5%</td>
</tr>
<tr>
<td>Oregon State University</td>
<td>7,599</td>
<td>8,138</td>
<td>7.1%</td>
<td>Iowa State University</td>
<td>19,358</td>
<td>19,838</td>
<td>2.5%</td>
</tr>
</tbody>
</table>

#### Room & Board Rates - Double Occupancy

<table>
<thead>
<tr>
<th>2010-2011</th>
<th>2012-2013</th>
<th>% Chg</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cornell University</td>
<td>13,110</td>
<td>13,630</td>
</tr>
<tr>
<td>UC Davis</td>
<td>12,157</td>
<td>12,790</td>
</tr>
<tr>
<td>University of Illinois</td>
<td>9,468</td>
<td>10,012</td>
</tr>
<tr>
<td>Oregon State University</td>
<td>9,638</td>
<td>9,671</td>
</tr>
<tr>
<td>Ohio State University</td>
<td>9,765</td>
<td>10,370</td>
</tr>
<tr>
<td>Colorado State University</td>
<td>8,364</td>
<td>9,364</td>
</tr>
<tr>
<td>Purdue University</td>
<td>9,250</td>
<td>9,299</td>
</tr>
<tr>
<td>Pennsylvania State University</td>
<td>8,450</td>
<td>8,700</td>
</tr>
<tr>
<td>University of Arizona</td>
<td>8,547</td>
<td>8,636</td>
</tr>
<tr>
<td>Michigan State University</td>
<td>8,154</td>
<td>8,476</td>
</tr>
<tr>
<td>Texas A&amp;M University</td>
<td>7,898</td>
<td>8,172</td>
</tr>
<tr>
<td>University of Wisconsin</td>
<td>7,724</td>
<td>8,024</td>
</tr>
<tr>
<td>Iowa State University</td>
<td>7,621</td>
<td>7,721</td>
</tr>
<tr>
<td>N. Carolina State University</td>
<td>7,110</td>
<td>7,460</td>
</tr>
</tbody>
</table>

Sources: Oregon State Board of Higher Education, OUS Academic Year Fee Books and Institutional websites
## SURVEY OF PEER UNIVERSITIES - UO, OSU, and PSU

### 2012-2013 Annual Tuition and Fees Comparison

Select Western State Peers - Based on 12 credit hours

<table>
<thead>
<tr>
<th>Western States Institutions</th>
<th>Resident Undergraduate</th>
<th>Nonresident Undergraduate</th>
<th>Resident Graduate</th>
<th>Nonresident Graduate</th>
</tr>
</thead>
<tbody>
<tr>
<td>University of Oregon</td>
<td>7,708</td>
<td>23,188</td>
<td>14,530</td>
<td>22,198</td>
</tr>
<tr>
<td>Oregon State University</td>
<td>8,138</td>
<td>22,322</td>
<td>12,845</td>
<td>19,757</td>
</tr>
<tr>
<td>Portland State University</td>
<td>6,375</td>
<td>18,543</td>
<td>13,395</td>
<td>20,235</td>
</tr>
<tr>
<td>University of Hawaii Manoa</td>
<td>9,404</td>
<td>25,652</td>
<td>12,352</td>
<td>25,912</td>
</tr>
<tr>
<td>University of Idaho</td>
<td>7,710</td>
<td>21,996</td>
<td>8,660</td>
<td>21,448</td>
</tr>
<tr>
<td>University of New Mexico</td>
<td>7,309</td>
<td>21,912</td>
<td>7,847</td>
<td>22,463</td>
</tr>
<tr>
<td>University of Alaska Fairbanks</td>
<td>6,124</td>
<td>16,282</td>
<td>11,460</td>
<td>21,252</td>
</tr>
<tr>
<td>University of Utah</td>
<td>6,016</td>
<td>18,917</td>
<td>7,143</td>
<td>22,914</td>
</tr>
<tr>
<td>Utah State University</td>
<td>5,560</td>
<td>15,940</td>
<td>6,401</td>
<td>20,195</td>
</tr>
<tr>
<td>University of Nevada Reno</td>
<td>5,382</td>
<td>19,292</td>
<td>6,968</td>
<td>20,878</td>
</tr>
<tr>
<td>University of Alaska Southeast</td>
<td>4,597</td>
<td>14,557</td>
<td>9,949</td>
<td>19,549</td>
</tr>
<tr>
<td>University of Wyoming</td>
<td>4,487</td>
<td>11,855</td>
<td>6,887</td>
<td>16,391</td>
</tr>
<tr>
<td><strong>Average of Western States Comparators without Oregon</strong></td>
<td><strong>6,288</strong></td>
<td><strong>18,489</strong></td>
<td><strong>8,630</strong></td>
<td><strong>21,222</strong></td>
</tr>
<tr>
<td>UO % of average</td>
<td>122.6%</td>
<td>125.4%</td>
<td>168.4%</td>
<td>104.6%</td>
</tr>
<tr>
<td>OSU % of average</td>
<td>129.4%</td>
<td>120.7%</td>
<td>148.8%</td>
<td>93.1%</td>
</tr>
<tr>
<td>PSU % of average</td>
<td>101.4%</td>
<td>100.3%</td>
<td>155.2%</td>
<td>95.3%</td>
</tr>
</tbody>
</table>

Sources: Oregon State Board of Higher Education, OUS 2012-13 Academic Fee Book and Institutional websites
## Oregon State University - Corvallis Campus
### Academic Year 2012-13 - Tuition, Base Rates

<table>
<thead>
<tr>
<th>Credits</th>
<th>Resident</th>
<th></th>
<th>Non-Resident</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Undergraduate</td>
<td>Graduate</td>
<td>Undergraduate</td>
<td>Graduate</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>185.00</td>
<td>421.00</td>
<td>579.00</td>
<td>677.00</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>370.00</td>
<td>842.00</td>
<td>1,158.00</td>
<td>1,354.00</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>555.00</td>
<td>1,263.00</td>
<td>1,737.00</td>
<td>2,031.00</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>740.00</td>
<td>1,684.00</td>
<td>2,316.00</td>
<td>2,708.00</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>925.00</td>
<td>2,105.00</td>
<td>2,895.00</td>
<td>3,385.00</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>1,110.00</td>
<td>2,526.00</td>
<td>3,474.00</td>
<td>4,062.00</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>1,295.00</td>
<td>2,947.00</td>
<td>4,053.00</td>
<td>4,739.00</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>1,480.00</td>
<td>3,368.00</td>
<td>4,632.00</td>
<td>5,416.00</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>1,665.00</td>
<td>3,789.00</td>
<td>5,211.00</td>
<td>6,093.00</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>1,850.00</td>
<td>3,789.00</td>
<td>5,790.00</td>
<td>6,093.00</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>2,035.00</td>
<td>3,789.00</td>
<td>6,369.00</td>
<td>6,093.00</td>
<td></td>
</tr>
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Each Add'l Credit Hour:

- **Resident:** 185.00
- **Non-Resident:** 579.00

### Endnotes:

1. A one time Matriculation Fee of $300 is assessed to all new and transferred undergraduate students.
2. Honors College Students are assessed an additional Honors College tuition of $310 per term.
### Oregon State University - Corvallis Campus

**Academic Year 2012-13 - Mandatory Fees, Per Term**

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### Endnotes:

1. A one time Matriculation Fee of $300 is assessed to all new and transfer students.
### Oregon State University - Corvallis Campus

**Academic Year 2012-13 - Undergraduate, Differential Tuition Rates**

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**Endnotes:**

(1) A one time Matriculation Fee of $300 is assessed to all new and transfer students.

(2) Honors College Students are assessed an additional Honors College tuition of $310 per term.
Oregon State University - Corvallis Campus  
Academic Year 2012-13 - Undergraduate, Differential Tuition Rates

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Each Add'l Credit Hour  

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Endnotes:

(1) Includes the following Majors: Forest Engineering, Pre-Forest Engineering/Civil Engineering, Professional Forest Engineering/Civil Engineering, Forest Management, Forest Operations Management, Renewable Materials, Wood Science and Technology. All Other College of Forestry majors charged regular undergraduate base tuition and fees.


(3) Honors College Students are assessed an additional Honors College tuition of $310 per term.

(4) A one time Matriculation Fee of $300 is assessed to all new and transfer students.
Oregon State University
Academic Year 2012-13 - Graduate, Differential Tuition Rates

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Each Add’l Credit Hour

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<td>677.00</td>
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Endnotes:

(1) A one time Matriculation Fee of $300 is assessed to all new and transfer students.
(2) PSM Overload assessed at regular graduate rates.
## Oregon State University
### Academic Year 2012-13 - Graduate, Differential Tuition Rates

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<td>9,660.00</td>
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Each Add'l Credit Hour

|          | 0.00 | 0.00 | 0.00 | 0.00 | 484.00 | 778.00 |

### Endnotes:

1. A one time Matriculation Fee of $300 is assessed to all new and transfer students.
2. PSM Overload assessed at regular graduate rates.
## Oregon State University
### Academic Year 2012-13 - Graduate, Differential Tuition Rates

<table>
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<tr>
<th>Credits</th>
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<th>Veterinary Medicine (^{1, 3, 3a, 4, 4a})</th>
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**Each Add'l Credit Hour**

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<tr>
<th>Credits</th>
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<th>Veterinary Medicine (^{1, 3, 3a, 4, 4a})</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>672.00</td>
<td>747.00</td>
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</tbody>
</table>

**Endnotes:**

1. Vet Med is full-time program only.
2. A one time Matriculation Fee of $300 is assessed to all new and transfer students.
3. Veterinary Medicine students will not be assessed the over-time fee.
   
   (3a) This exception to the general policy for other graduate programs results from the Veterinary Medicine curricular design which requires larger carrying loads in certain terms for normal progress toward a degree.

4. Fourth Year students taking a series of study, externship, and clinical rotations from the beginning of Finals Week in June to the end of Dead Week the following June are assessed four term fees during that period of time.

   (4a) Fee payment dates will correspond to normal Fall, Winter, Spring and Summer term schedules.

5. Honors College Students are assessed an additional Honors College tuition of $310 per term.
### Oregon State University - Cascades Campus

#### Academic Year 2012-13 - Tuition, Base Rates

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<th>Credits</th>
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<th>Graduate</th>
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#### Endnotes:

1. A one time Matriculation Fee of $300 is assessed to all new and transfer undergraduate students.
## Oregon State University - Cascades Campus

Academic Year 2012-13 - Mandatory Fees

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### Endnotes:

(1) A one time Matriculation Fee of $300 is assessed to all new and transfer undergraduate students.
Oregon State University - Cascades Campus  
Academic Year 2012-13 - Undergraduate, Differential Tuition Rates

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Each Add'l Credit Hour  
Business: 192.00  596.00  
Engineering: 226.00  630.00

Endnotes:  
(1) A one time Matriculation Fee of $300 is assessed to all new and transfer undergraduate students.
Oregon State University
Capital Projects

The following schedule is a list of capital projects authorized by the Oregon University System (OUS) Board and the Oregon Legislature for Oregon State University as of June 30, 2012. Each biennium OUS campuses submit budget requests to the OUS Board based on their campus’ master plans and identified needs. The Oregon University System presents a capital budget to the Governor and the Legislature, which authorizes expenditure limitation for approved projects and identifies sources of funding. Expenditure limitation authorization are for six years, expiring if not been used within the timeframe. OUS may also seek authorization for expenditure limitation from the Legislative Emergency Board for projects not anticipated during the capital budgeting process.

The OSU Capital Projects are according to the biennium of legislative authorization, and the sources of financing identified for the projects. Current funding sources include:

- XI-G Bonds represent bonds issues by the State for the Oregon University System under Article XI of the Oregon Constitution. The university must raise a one to one cash match to qualify for the issuance of XI-G Bonds. Debt service is paid by the state general fund, and OSU is not responsible for debt repayment.

- XI-F Bonds are used to finance self-liquidating and self-supporting projects, and these bonds are a direct liability of the university. Revenue sources for repayment include student building and incidental fees, residential housing receipts, income from athletics, and parking fees.

- Other funds are generally gifts and donations to support building construction and improvements.

- Lottery Bonds are issued by the state with the debt service paid with revenues generated by the state lottery. Projects funded with Lottery Bonds must contribute to economic development.

- The State Energy Loan Program (SELP) is a low interest loan program for energy conservation projects, administered through the State of Oregon, Office of Energy. Repayment is funded through energy savings generated by the projects.

- Certificates of Participation (COPS) are financing instruments issued by the state, generally for equipment and technology, which are backed by the equipment or improvement being purchased.

Major capital spending projects planned for FY 2013 include the new Business Education building, Strand Ag Hall remodel, new residence building and the Student Experience Center.
<table>
<thead>
<tr>
<th>Project Title</th>
<th>Biennium</th>
<th>General Funds</th>
<th>XI-G Bonds</th>
<th>XI-F Bonds</th>
<th>Other Bonds</th>
<th>Lottery Bonds</th>
<th>Loans &amp; COP's</th>
<th>XI-Q Bonds</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apperson Hall</td>
<td>07-09</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
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<td>$</td>
<td>$</td>
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<tr>
<td>Pauling Research &amp; Education Bldg. (LPI &amp; class laboratory)</td>
<td>07-09</td>
<td>-</td>
<td>31,256,035</td>
<td>-</td>
<td>31,256,035</td>
<td>-</td>
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<td>Mouse Model Organism Facility</td>
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<td>Nash Hall DM/Seismic Tier II</td>
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<td>National Wave Energy Research Center</td>
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<td>Building Rewiring</td>
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<td>Goss Stadium Expansion</td>
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<td>UHDS Arnold Hall Renovation</td>
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<tr>
<td>Cross Country Track</td>
<td>07-09</td>
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<td>Boathouse Remodel</td>
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<td>Gill Coliseum Renovation</td>
<td>07-09</td>
<td>-</td>
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<tr>
<td>Education Hall Structural Deficiencies DM</td>
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<td>Strand Ag Hall Deferred Maintenance</td>
<td>09-11</td>
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<td>Bates Hall/Hallie Ford Healthy Children &amp; Families Center</td>
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<td>-</td>
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<td>Sports Performance Center</td>
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<td>CH2M Hill Alumni Center</td>
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<td>Intramural Outdoor Sports Complex</td>
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<td>McAlexander Field House</td>
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<td>500,000</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>3,750,000</td>
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<tr>
<td>Sonpark/EPA Acquisition</td>
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<tr>
<td>Warehouse Acquisition</td>
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<td>Marine Mammal and Genomics Building</td>
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<td>Biofuels Demonstration Project</td>
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<tr>
<td>New Business Education Building</td>
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<td>-</td>
<td>-</td>
<td>-</td>
<td>56,000,000</td>
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<td>Cascades Graduate Studies Building</td>
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<td>-</td>
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<td>-</td>
<td>2,000,000</td>
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<td>-</td>
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<tr>
<td>Animal Sciences Teaching Pavilion Equipment</td>
<td>11-13</td>
<td>-</td>
<td>-</td>
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<td>-</td>
<td>-</td>
<td>-</td>
<td>2,000,000</td>
</tr>
<tr>
<td>Education Hall Deferred Maintenance</td>
<td>11-13</td>
<td>-</td>
<td>-</td>
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<td>-</td>
<td>-</td>
<td>-</td>
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<tr>
<td>OSU Bookstore Relocation</td>
<td>11-13</td>
<td>-</td>
<td>-</td>
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<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>12,000,000</td>
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<tr>
<td>UHDS Infrastructure Upgrades</td>
<td>11-13</td>
<td>-</td>
<td>-</td>
<td>8,000,000</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>8,000,000</td>
</tr>
<tr>
<td>Cross Country Track Expanded Scope</td>
<td>11-13</td>
<td>-</td>
<td>1,000,000</td>
<td>-</td>
<td>3,000,000</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>4,000,000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>$ 5,276,000</strong></td>
<td><strong>$ 54,172,035</strong></td>
<td><strong>$ 115,200,001</strong></td>
<td><strong>$ 132,746,035</strong></td>
<td><strong>$ 41,240,000</strong></td>
<td><strong>$ 21,575,000</strong></td>
<td><strong>$ 4,847,000</strong></td>
<td><strong>$ 375,056,071</strong></td>
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</table>
### Oregon State University
### Capital Budget - Major Projects
### Fiscal Year 2013

<table>
<thead>
<tr>
<th>Project</th>
<th>Authorization</th>
<th>Spent as of 2012</th>
<th>FY13 Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education Hall Remodel</td>
<td>$17,667,228</td>
<td>$15,812,141</td>
<td>$1,855,087</td>
</tr>
<tr>
<td>Cultural Centers</td>
<td>$10,000,000</td>
<td>$1,463,972</td>
<td>$8,536,028</td>
</tr>
<tr>
<td>AES-Animal Pavillion</td>
<td>$10,000,000</td>
<td>$3,728,102</td>
<td>$6,271,898</td>
</tr>
<tr>
<td>New Business Education Building</td>
<td>$56,000,000</td>
<td>$1,674,141</td>
<td>$54,325,859</td>
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<tr>
<td>Strand Ag Hall Remodel</td>
<td>$24,000,000</td>
<td>$724,209</td>
<td>$23,275,791</td>
</tr>
<tr>
<td>Cascades Graduate Studies Building</td>
<td>$5,000,000</td>
<td>$4,545,683</td>
<td>$454,317</td>
</tr>
<tr>
<td>Sports Performance Center</td>
<td>$12,000,000</td>
<td>$1,368,613</td>
<td>$10,631,387</td>
</tr>
<tr>
<td>Cross Country Track</td>
<td>$4,000,000</td>
<td>$3,959,487</td>
<td>$40,513</td>
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<tr>
<td>New Residence Building</td>
<td>$30,000,000</td>
<td>$999,597</td>
<td>$29,000,403</td>
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<td>Student Experience Center</td>
<td>$43,000,000</td>
<td>$992,166</td>
<td>$42,007,834</td>
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<td>Gill Coliseum Renovation</td>
<td>$20,000,000</td>
<td>$8,331,947</td>
<td>$11,668,053</td>
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<td>Student Success Center</td>
<td>$14,000,000</td>
<td>$11,211,216</td>
<td>$2,788,784</td>
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<tr>
<td>HP Building 11 Renovation</td>
<td>$9,500,000</td>
<td>$8,495,394</td>
<td>$1,004,606</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>$255,167,228</strong></td>
<td><strong>$63,306,670</strong></td>
<td><strong>$191,860,558</strong></td>
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</tbody>
</table>
OSU-Cascades is embarking on yet another year of change in fiscal year 2013. A recent Board of Higher Education endorsement has enabled OSU-Cascades to pursue its goal of being a four-year University, while still enjoying the benefits of being an OSU branch campus.

OSU-Cascades embarked upon a fund raising campaign to support its capital request for additional facilities to support the campus growth and expansion. The local community has shown outstanding support and $1.8 million was raised in just over six weeks. The Tykeson Family Trust recently donated an additional $1 million for campus facilities, our largest donation to date. The graduate programs have moved into our new building, the OSU-Cascades Graduate & Research Center, and our first classes started this fall.
<table>
<thead>
<tr>
<th>State Appropriation</th>
<th>FY2012</th>
<th>FY2013</th>
<th>Dollar Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate funding</td>
<td>$777,880</td>
<td>$887,041</td>
<td>$109,161</td>
<td>14.0%</td>
</tr>
<tr>
<td>Graduate funding</td>
<td>257,042</td>
<td>300,113</td>
<td>43,071</td>
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<tr>
<td>Enrollment growth</td>
<td>-</td>
<td>48,964</td>
<td>48,964</td>
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<tr>
<td><strong>Total Enrollment Funding</strong></td>
<td>1,034,922</td>
<td>1,236,118</td>
<td>201,196</td>
<td>19.4%</td>
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</table>

**Targeted Programs**

<table>
<thead>
<tr>
<th>Regional Support</th>
<th>FY2012</th>
<th>FY2013</th>
<th>Dollar Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retrenchment</td>
<td>116,685</td>
<td>121,447</td>
<td>4,762</td>
<td>4.1%</td>
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<tr>
<td>Retention &amp; Graduation</td>
<td>204,197</td>
<td>212,532</td>
<td>8,335</td>
<td>4.1%</td>
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<tr>
<td>Underpinning</td>
<td>204,197</td>
<td>212,532</td>
<td>8,335</td>
<td>4.1%</td>
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<tr>
<td>Regional Solutions</td>
<td>-</td>
<td>12,000</td>
<td>12,000</td>
<td>-</td>
</tr>
<tr>
<td>Regional University Support Adjustment</td>
<td>2,472,489</td>
<td>2,535,317</td>
<td>62,828</td>
<td>2.5%</td>
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<tr>
<td>Regional University Support Settle-up FY12</td>
<td>-</td>
<td>(80,641)</td>
<td>(80,641)</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total Regional Support</strong></td>
<td>2,997,568</td>
<td>3,013,187</td>
<td>15,619</td>
<td>0.5%</td>
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**Other**

<table>
<thead>
<tr>
<th>Engineering Technology Undergraduate</th>
<th>FY2012</th>
<th>FY2013</th>
<th>Dollar Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Engineering Technology Undergraduate Settle-up-FY12</td>
<td>16,647</td>
<td>8,813</td>
<td>(7,834)</td>
<td>-47.1%</td>
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<tr>
<td><strong>Total Other</strong></td>
<td>16,647</td>
<td>195</td>
<td>(16,452)</td>
<td>-98.8%</td>
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**Total State Appropriation**

<table>
<thead>
<tr>
<th>FY2012</th>
<th>FY2013</th>
<th>Dollar Change</th>
<th>% Change</th>
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</thead>
<tbody>
<tr>
<td>$4,049,137</td>
<td>$4,249,500</td>
<td>$200,363</td>
<td>4.9%</td>
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## Oregon State University - Cascades
### FY13 Revenue Summary with Comparison to FY12

<table>
<thead>
<tr>
<th></th>
<th>FY12 Initial Budget</th>
<th>FY13 Initial Budget</th>
<th>FY13 Over (Under)</th>
<th>FY12 $</th>
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<tr>
<td><strong>STATE APPROPRIATION</strong></td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td>RAM Cell Funding</td>
<td>$ 1,140,526</td>
<td>$ 1,236,118</td>
<td>$ 95,592</td>
<td>8.4%</td>
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<tr>
<td>Targeted Programs:</td>
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<td></td>
</tr>
<tr>
<td>Regional Support</td>
<td>3,303,442</td>
<td>3,013,187</td>
<td>(290,255)</td>
<td>-8.8%</td>
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<tr>
<td>Other Targeted Programs</td>
<td>18,346</td>
<td>195</td>
<td>(18,151)</td>
<td>-98.9%</td>
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<tr>
<td><strong>SUBTOTAL TARGETED PROGRAMS</strong></td>
<td>3,321,788</td>
<td>3,013,382</td>
<td>(308,406)</td>
<td>-9.3%</td>
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<tr>
<td><strong>TOTAL STATE APPROPRIATION</strong></td>
<td>4,462,314</td>
<td>4,249,500</td>
<td>(212,814)</td>
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<td><strong>Tuition &amp; Fees:</strong></td>
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<tr>
<td>Tuition</td>
<td>4,124,843</td>
<td>4,695,752</td>
<td>570,909</td>
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<td>Student Fees</td>
<td>177,150</td>
<td>173,134</td>
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<tr>
<td>Less Tuition Remissions</td>
<td></td>
<td>(1,308)</td>
<td>(1,308)</td>
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<tr>
<td><strong>SUBTOTAL NET TUITION &amp; FEES</strong></td>
<td>4,301,993</td>
<td>4,867,578</td>
<td>565,585</td>
<td>13.1%</td>
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<tr>
<td><strong>Other Revenue</strong></td>
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<tr>
<td>Sales &amp; Services Revenue</td>
<td>8,000</td>
<td>197,224</td>
<td>189,224</td>
<td>2365.3%</td>
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<tr>
<td><strong>TOTAL EDUCATIONAL AND GENERAL REVENUES</strong></td>
<td>$ 8,772,307</td>
<td>$ 9,314,302</td>
<td>$ 541,995</td>
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## Oregon State University - Cascades

## FY13 Budget Allocation Summary with Comparison to FY12

<table>
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<tr>
<th>Centrally Administered Funds</th>
<th>FY12 Initial Budget</th>
<th>FY13 Initial Budget</th>
<th>% Chg</th>
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<tbody>
<tr>
<td></td>
<td>$ 430,130</td>
<td>$ 165,022</td>
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### Direct Instruction and Research Delivery

<table>
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<th>FY12 Initial Budget</th>
<th>FY13 Initial Budget</th>
<th>% Chg</th>
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<tbody>
<tr>
<td>Instructional Research Support ¹</td>
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<td>Education</td>
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<tr>
<td>Counseling</td>
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<td>572,521</td>
<td>61.5%</td>
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<tr>
<td>Psychology</td>
<td>228,901</td>
<td>279,906</td>
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</tr>
<tr>
<td>Humanities</td>
<td>328,283</td>
<td>411,240</td>
<td>25.3%</td>
</tr>
<tr>
<td>Art Instruction</td>
<td>188,488</td>
<td>256,464</td>
<td>36.1%</td>
</tr>
<tr>
<td>Business and Technology Instruction</td>
<td>544,742</td>
<td>583,486</td>
<td>7.1%</td>
</tr>
<tr>
<td>General Science &amp; Biology</td>
<td>179,842</td>
<td>227,806</td>
<td>26.7%</td>
</tr>
<tr>
<td>Health and Human Sciences</td>
<td>270,792</td>
<td>513,163</td>
<td>89.5%</td>
</tr>
<tr>
<td>Natural Resources Instruction</td>
<td>232,044</td>
<td>280,965</td>
<td>21.1%</td>
</tr>
<tr>
<td>Outdoor Recreation Leadership/Tourism</td>
<td>195,576</td>
<td>227,712</td>
<td>16.4%</td>
</tr>
<tr>
<td>Engineering</td>
<td>201,452</td>
<td>341,677</td>
<td>69.6%</td>
</tr>
<tr>
<td>Library</td>
<td>157,290</td>
<td>157,957</td>
<td>0.4%</td>
</tr>
<tr>
<td>Oregon National Guard Gold Program</td>
<td>500</td>
<td>250</td>
<td>-50.0%</td>
</tr>
</tbody>
</table>

**Direct Instr and Research Delivery Total** | 3,914,142 | 4,851,693 | 24.0% |

### Service, Support, and Management:

<table>
<thead>
<tr>
<th>Department</th>
<th>FY12 Initial Budget</th>
<th>FY13 Initial Budget</th>
<th>% Chg</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Office</td>
<td>815,646</td>
<td>485,082</td>
<td>-40.5%</td>
</tr>
<tr>
<td>Academic Affairs/Student Affairs</td>
<td>795,293</td>
<td>807,877</td>
<td>1.6%</td>
</tr>
<tr>
<td>Advising &amp; Enrollment Services</td>
<td>531,745</td>
<td>509,115</td>
<td>-4.3%</td>
</tr>
<tr>
<td>Finance and Administration</td>
<td>375,480</td>
<td>663,956</td>
<td>76.8%</td>
</tr>
<tr>
<td>Marketing/Communication/Development</td>
<td>472,470</td>
<td>408,599</td>
<td>-13.5%</td>
</tr>
<tr>
<td>Facilities</td>
<td>950,000</td>
<td>794,928</td>
<td>-16.3%</td>
</tr>
<tr>
<td>IT Infrastructure</td>
<td>487,400</td>
<td>628,030</td>
<td>28.9%</td>
</tr>
</tbody>
</table>

**Service, Support, and Management Total** | 4,428,034 | 4,297,587 | -2.9% |

### Distributable Budget and Targeted Programs

<table>
<thead>
<tr>
<th>FY12 Initial Budget</th>
<th>FY13 Initial Budget</th>
<th>% Chg</th>
</tr>
</thead>
<tbody>
<tr>
<td>8,342,176</td>
<td>9,149,280</td>
<td>9.7%</td>
</tr>
</tbody>
</table>

**Total Budget:**

<table>
<thead>
<tr>
<th>FY12 Initial Budget</th>
<th>FY13 Initial Budget</th>
<th>% Chg</th>
</tr>
</thead>
<tbody>
<tr>
<td>$ 8,772,306</td>
<td>$ 9,314,302</td>
<td>6.2%</td>
</tr>
</tbody>
</table>

¹ Reserve to be distributed to departments throughout the year.
Oregon State University - Cascades

Total Student FTE Enrollment
Fiscal Years: 2004 to 2012 Actual, 2013 Budget

State Appropriation per Student FTE
Fiscal Years: 2004-2012 Actual, 2013 Budget

Net Tuition per Student FTE
Fiscal Years: 2004-2012 Actual, 2013 Budget

Source: OUS Institutional Research, FY13 Cascades Initial Budget.
Oregon State University’s Statewide Public Services are critical to the long-term economic growth, social progress, and sustainability of communities, to attracting and retaining industry, and to entrepreneurship, innovation, and new business ventures and job creation. The investment the state makes in the Agricultural Experiment Station, the Extension Service and the Forest Research Laboratory generates OSU external funding that is more than twice the state investment.

These programs extend research discoveries for Oregonians to use where they live and work. They leverage outside funds to bring science to bear on some of the most pressing issues of our lives involving food, water, shelter, and sustainable economic development.
## SUMMARY

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>State Resource Expenditures</th>
<th>All Other Expenditures</th>
<th>Other/State Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY2004</td>
<td>$46,906,388</td>
<td>$63,552,431</td>
<td>1.35</td>
</tr>
<tr>
<td>FY2005</td>
<td>$43,394,056</td>
<td>$70,281,641</td>
<td>1.62</td>
</tr>
<tr>
<td>FY2006</td>
<td>$48,924,850</td>
<td>$72,789,361</td>
<td>1.49</td>
</tr>
<tr>
<td>FY2007</td>
<td>$50,693,131</td>
<td>$72,171,656</td>
<td>1.42</td>
</tr>
<tr>
<td>FY2008</td>
<td>$55,127,463</td>
<td>$71,268,304</td>
<td>1.29</td>
</tr>
<tr>
<td>FY2009</td>
<td>$53,042,840</td>
<td>$82,229,731</td>
<td>1.55</td>
</tr>
<tr>
<td>FY2010</td>
<td>$53,281,295</td>
<td>$82,172,577</td>
<td>1.54</td>
</tr>
<tr>
<td>FY2011</td>
<td>$45,133,879</td>
<td>$97,319,423</td>
<td>2.16</td>
</tr>
<tr>
<td>FY2012</td>
<td>$46,528,234</td>
<td>$99,489,087</td>
<td>2.14</td>
</tr>
</tbody>
</table>

## AGRICULTURAL EXPERIMENT STATION

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>State Resource Expenditures</th>
<th>All Other Expenditures</th>
<th>Other/State Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY2004</td>
<td>$25,119,250</td>
<td>$35,348,196</td>
<td>1.41</td>
</tr>
<tr>
<td>FY2005</td>
<td>$25,119,250</td>
<td>$37,887,190</td>
<td>1.51</td>
</tr>
<tr>
<td>FY2006</td>
<td>$26,866,268</td>
<td>$40,525,668</td>
<td>1.51</td>
</tr>
<tr>
<td>FY2007</td>
<td>$27,802,337</td>
<td>$40,277,936</td>
<td>1.45</td>
</tr>
<tr>
<td>FY2008</td>
<td>$30,090,130</td>
<td>$39,119,929</td>
<td>1.30</td>
</tr>
<tr>
<td>FY2009</td>
<td>$28,847,079</td>
<td>$44,294,775</td>
<td>1.54</td>
</tr>
<tr>
<td>FY2010</td>
<td>$28,963,666</td>
<td>$47,070,130</td>
<td>1.63</td>
</tr>
<tr>
<td>FY2011</td>
<td>$24,534,737</td>
<td>$61,397,254</td>
<td>2.50</td>
</tr>
<tr>
<td>FY2012</td>
<td>$25,378,812</td>
<td>$63,418,488</td>
<td>2.50</td>
</tr>
</tbody>
</table>
## Oregon State University

### Statewide Public Services

Ratio of State Resource Expenditures to All Other Expenditures

Fiscal Years: 2004-2012 Actual

### EXTENSION SERVICE

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>State Resource Expenditures</th>
<th>All Other Expenditures</th>
<th>Other/State Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY2004</td>
<td>$19,317,818</td>
<td>$11,408,971</td>
<td>0.59</td>
</tr>
<tr>
<td>FY2005</td>
<td>$15,805,487</td>
<td>$15,581,665</td>
<td>0.99</td>
</tr>
<tr>
<td>FY2006</td>
<td>$19,336,636</td>
<td>$14,215,381</td>
<td>0.74</td>
</tr>
<tr>
<td>FY2007</td>
<td>$20,076,088</td>
<td>$14,936,915</td>
<td>0.74</td>
</tr>
<tr>
<td>FY2008</td>
<td>$21,746,832</td>
<td>$14,662,333</td>
<td>0.67</td>
</tr>
<tr>
<td>FY2009</td>
<td>$20,895,548</td>
<td>$19,489,256</td>
<td>0.93</td>
</tr>
<tr>
<td>FY2010</td>
<td>$21,161,731</td>
<td>$16,231,030</td>
<td>0.77</td>
</tr>
<tr>
<td>FY2011</td>
<td>$17,925,823</td>
<td>$18,635,181</td>
<td>1.04</td>
</tr>
<tr>
<td>FY2012</td>
<td>$18,357,067</td>
<td>$17,109,615</td>
<td>0.93</td>
</tr>
</tbody>
</table>

### FOREST RESEARCH LABORATORY

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>State Resource Expenditures</th>
<th>All Other Expenditures</th>
<th>Other/State Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY2004</td>
<td>$2,469,320</td>
<td>$16,795,264</td>
<td>6.80</td>
</tr>
<tr>
<td>FY2005</td>
<td>$2,469,319</td>
<td>$16,812,786</td>
<td>6.81</td>
</tr>
<tr>
<td>FY2006</td>
<td>$2,721,946</td>
<td>$18,048,312</td>
<td>6.63</td>
</tr>
<tr>
<td>FY2007</td>
<td>$2,814,706</td>
<td>$16,956,805</td>
<td>6.02</td>
</tr>
<tr>
<td>FY2008</td>
<td>$3,290,501</td>
<td>$17,486,042</td>
<td>5.31</td>
</tr>
<tr>
<td>FY2009</td>
<td>$3,300,213</td>
<td>$18,445,700</td>
<td>5.59</td>
</tr>
<tr>
<td>FY2010</td>
<td>$3,155,898</td>
<td>$18,871,417</td>
<td>5.98</td>
</tr>
<tr>
<td>FY2011</td>
<td>$2,673,319</td>
<td>$17,286,988</td>
<td>6.47</td>
</tr>
<tr>
<td>FY2012</td>
<td>$2,792,355</td>
<td>$18,960,984</td>
<td>6.79</td>
</tr>
</tbody>
</table>
The Oregon State University Athletic Department receives funding from the Education & General Funds Budget (E&G) annually. These funds pay for non-revenue producing athletic program coaching salaries and Other Payroll Expenses (OPE), excluding Football and Men’s Basketball programs. The initial E&G funding amount was $4 million but was reduced beginning in FY2006 when the renovated East Side of the football stadium opened, garnering the Athletic Department additional funding through ticket sales and associated fundraising. In fiscal years 2011 and 2012, a budgetary shortfall resulted due to the economic downturn and other economic factors. Additional E&G funding requested and subsequently approved, helped to balance the Athletic Department budget, while keeping in mind a new revenue source becoming available in FY13 in the form of the new Pac-12 Television package. Once new revenue is realized, E&G funding will initially be reduced to the $4 million historic level, and further reductions will be made over time as increasing revenues allow.

The graph conservatively shows the measurable funding effect the Athletic Department has on the University. Except for fiscal years 2003, 2011 and 2012, the Athletic Department has annually supported the University in excess of the E&G funding received through payment of student-athlete tuition and fees as well as the 3% F&A Assessment. For FY2003 through FY2010, Athletic Department support exceeded the E&G Funding by an average of over $1 million annually. Projections through FY2016 (including revenue shortfalls in FY2011 and FY2012) anticipate the average will increase to $1.3 million. Over the term of this report, the estimated financial return to the University will be in excess of $17 million.

This graph does not reflect other economic factors such as the 235 student-athletes who participated in athletics programs in FY2011 but received no athletic financial aid (walk-on) or the additional student-athletes who receive only partial scholarships. When taken into account, these resources provide additional economic return to the university, of approximately $4 million annually. In addition, another economic factor is the additional 500 student support personnel who do not receive athletic financial aid (Band, Cheer, Dance, Student Managers, Student Trainers, etc.).
Revenue from Athletics includes scholarships (received by OSU as tuition revenue), student fees and assessments paid to E&G.
Introduction

The intent of establishing the Extended Campus Revenue Allocation Model (ERAM) is to create a mechanism for building and sustaining delivery of an inventory of degree and credit-bearing certificate programs specifically designed to meet the academic needs of the growing non-residential, non-traditional student body of Oregon State University. The ERAM is intended to enable this development and delivery by:

1. Providing incentives for departments to become active in teaching non-resident, non-traditional OSU students.
2. Providing incentives for departments to collaborate with the Extended Campus in building and delivering the OSU distance and online program inventory.
3. Providing an additional source of revenue to departments to meet departmental growth and development needs.
4. Generating a “replacement” or additional revenue stream for University allocation for institutional sustainability and development.

Implementation

The ERAM, as presented in this document, received final approval from the President’s Office, the Provost’s Office, and the Office of the Vice President for Administration and Finance for initial implementation Winter Quarter 2003.

The ERAM is based on the assumption that the Student Credit Hour (SCH) output of distance education courses, with an adequate degree inventory, has the potential of rapid and significant growth. The ERAM will be applied to an inventory of online courses and degree and certificate programs, identified through market analysis, that meet the academic needs of the rapidly growing lifelong learning population in Oregon and the U.S, and the goals for outreach of OSU departments and colleges.

Implementation of ERAM is designed to stimulate growth of this inventory and programs, and is anticipated to result in a significant level of net revenue above costs for OSU.

Revenue Distribution Model

The ERAM model is framed around a revenue distribution formula designed to complement the FY 2003 Budget Allocation Model (BAM). This initial BAM was developed by the FY 2003 Budget Reconciliation Committee and is based on the “dollars-follow-productivity” philosophy reflected in the ERAM.
I. The original 2003 formula consisted of four basic components:

1. Graduate and undergraduate tuition rates are equal to the published tuition credit hour rates of courses on the Corvallis campus (Ecampus courses are designed to be self-sustaining and are not part of the tuition plateau.
2. A distribution formula for tuition revenues using a ratio of 80% to the academic unit, and 20% to program inventory development. A distribution formula for funding produced by the application of the RAM to eligible SCH using the ratio established by the BRC - 66.4% to academic units and 33.6% to central administrative units. This distribution ratio is designed to “float” with the ratios produced by the BAM.
3. A standardized distance-learning fee to operate the OSU Extended Campus centralized operations and infrastructure. The distance education fee replaces the fees that on-campus resident students pay for items such as student health services, athletic fees, residence building fees, etc.

II. Ecampus coordinates with OSU Office of Budget and Fiscal Planning in tracking the SCH productivity for each unit:

1. Tuition revenue is allocated by Ecampus based on current year SCH productivity - distributed on a quarterly basis.
2. RAM revenue is allocated based on eligible prior year SCH productivity - distributed at the beginning of the fiscal year.

III. During Academic Year 06-07, the allocation ratio was reviewed to determine the proposed future revenue allocations based on the following criteria:

1. Does the allocation ratio provide sufficient revenue flow to the departments participating in the delivery of the OSU Extended Campus distance degree inventory to support related departmental costs?
2. Does the allocation ratio provide sufficient incentive revenue for departmental growth and faculty development?
3. Are there emerging university-wide needs that require a larger percentage of the allocation ratio?

As a result of the review, the fiscal year 07-09 tuition formula was modified: 80% to academic units, 10% to Ecampus program and course development, and 10% for central reallocations. This 10% was reallocated to support rebasing. In fiscal year 2010 $1 million, in 2011 $4 million and in 2012 $3 million additional funds were set aside from Ecampus’s fund balance which went toward the central pools and reserves. These were one-time transfers.

Distribution Schedule for “Central Services”

Although the final distribution of the “central services” portion of the RAM revenues realized under the ERAM are the decision of the Office of Budget and Fiscal Planning, the ERAM
model is based on the intent that this portion of the revenue be allocated among those units directly impacted by providing support services for the OSU off-campus student body. The allocation is being distributed on the following schedule, based on the level of participation by the units in providing service/infrastructure support for off-campus students and to Ecampus. Initial distribution is as follows:

30% - Information Services
30% - University Library*
30% - Student Services (Admissions, Registrar)
10% - Graduate School

*The University Library is currently classified as an academic unit and is allocated a portion of the RAM revenue generated by Ecampus courses in the BAM calculations and distribution.
Oregon State University
Ecampus Estimated Distribution of FY13 Revenues

<table>
<thead>
<tr>
<th>Productivity Reallocation</th>
<th>Net Tuition</th>
<th>Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$ 25,011,774</td>
<td>$75 per SCH</td>
</tr>
<tr>
<td>$ 1,425,112</td>
<td>100.00%</td>
<td>80.00%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unit</th>
<th>Academic Units</th>
<th>66.40%</th>
<th>Ecampus</th>
<th>10.00%</th>
<th>Administration</th>
<th>10.00%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Units Total</td>
<td>100.00%</td>
<td>946,274</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Academic Units:
- Ag Sciences: 15.95% $150,956
- Business: 4.09% $38,702
- Education: 3.31% $31,351
- Forestry: 3.15% $29,842
- Pharmacy: 0.21% $2,006
- Science: 17.24% $163,137
- Graduate School: 0.06% $584
- Liberal Arts: 41.42% $391,970
- Earth, Ocean & Atmospheric: 6.00% $56,789
- Engineering: 1.83% $17,293
- Academic Affairs: 0.15% $1,448
- PHHS: 6.57% $62,196

<table>
<thead>
<tr>
<th>Unit</th>
<th>Academic Units Total</th>
<th>66.40%</th>
<th>E-campus</th>
<th>10.00%</th>
<th>Administration</th>
<th>10.00%</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>100.00%</td>
<td>946,274</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Rounded to whole dollars based on estimated percentage distributions.

Distributed to initial budget of academic units based on previous year's participation and to service units supporting Ecampus - 30% each to Library, Student Affairs and Information Services; 10% to Graduate School.
The academic units receive 80% of the tuition revenue generated by each course. The distribution amounts are calculated based on student enrollment and whether the student credit hours are generated by an undergraduate course or graduate course. Estimated amounts are allocated to unit initial budgets and a settle-up will occur at yearend.
Ten percent of revenue is allocated to central funds.
Gross $75 Distant Education (DE) Fee = $9,153,626 of which $500,000 is distributed to Financial aid. Net DE fee = $8,653,626 plus Development Math & Credit Workshops of $169,769 equals $8,823,395.
REVENUE DEFINITIONS

Additional Research Support
Additional research support provided to the institutions based on a percent of instructional faculty salaries. Funding was originally calculated at three percent of faculty salaries for OSU; however, it is currently reduced based on state dollars available.

Building Maintenance - Statewide Public Service Facilities at OSU
Provides an amount for Oregon State University to operate and maintain statewide public services facilities (related to Agriculture Experiment Station, Extension Services and Forestry Research Lab) on the Corvallis campus.

Campus Public Service Programs
Funding provided for institutional public service operations for the OSU Veterinary Diagnostic Laboratory.

Cell Funding
The number of eligible full time students (generally Oregon residents) by discipline drives funding. Funding values are identified in 12 “cells”: four levels of instruction by low, medium, and high cost. Each cell represents the average state share of cost for one FTE student. The number of FTE students in each cell drives the projected state revenue necessary to adequately fund instructional programs. Since the RAM was adopted in 1999, the Legislature has not fully funded the OUS request for state support. Due to state revenue reductions, the cell values and the number of students funded have been decreased to fall within the available dollars for allocation.

Climate Center
This funding will facilitate research, serve as a climate change information clearinghouse, provide technical assistance, and, at least once each biennium, assess the state of climate change science as it relates to impacts on Oregon.

Engineering Graduates
Targeted funding provided to supplement graduate cell funding per student FTE for this specialty high demand discipline.

Facilities and Administrative Cost Recovery
The Finance and administrative cost rate, previously known as indirect cost recovery negotiated with the U.S. Department of Health and Human Services (DHHS) for sponsored research projects include allowable centralized activity costs.

Natural Resources Institute
The Legislature approved funding in 2005-2007 for Oregon State University. The institute provides research and policy support to state agencies and other organizations on a variety of natural resource issues, including environmental.
Oregon Engineering Education Investment Fund (EEIF)
Funding for EEIF and Top Tier Engineering Schools is recommended by the Oregon Engineering and Technology Industry Council (ETIC) and approved by the Board of Higher Education.

OUS System-wide Expenses and Programs
System-wide expenses administered by the Chancellor’s Office on behalf of all the OUS institutions. Some amounts are allocated during the fiscal year.

- **Endowment Match** - The program was established in 1989 to provide state matching funds to encourage endowment gifts. Since then the funding has been reduced.
- **ORBIS** - Fund are provided to pay for access to online library services.
- **Oregon Joint Schools of Professional Business** - Fund to provide support for business education.
- **Department of Justice** - Funds for costs of legal services provided by the Department of Justice. Funding for DOJ charges is allocated to the campuses, and institutions are now responsible for payment of DOJ charges incurred on their behalf.
- **Faculty Diversity** - The faculty diversity funding is allocated at each campus on a pro-rated basis. Campuses report plans and activities to the Chancellor’s Office.
- **Services to Students with Disabilities** - Funding is allocated directly to the campuses based on the preceding year’s expense distribution to serve these students as is reported each spring.
- **Natural Heritage Program** - The Legislature established funding in the 2003-2005 biennium to support the cooperative efforts between OSU Institute for Natural Resources and the Oregon Division of State Lands. There are three main program areas for Oregon. It works to establish natural areas, manages the Rare Endangered Invertebrate Program and the Oregon Natural Heritage databank.

Other Student Fees
Laboratory or Course Fees must be published in the institution’s catalogue and/or time schedule of classes. Laboratory or Course Fees are limited to institutional sale to students of equipment, materials, or services required as a part of course instruction where the equipment or material is consumed by the student as a part of the course.

Resource Allocation Model
The Resource Allocation Model (RAM) allocates state General Fund dollars to campuses. State General Fund support is provided to campuses through two mechanisms: on a per-student FTE basis that is funded through the cells, and on a targeted program basis.

Resource Fees
Undergraduate resource fees are now rolled in the regular tuition fee. Graduate resource fees are billed separately.

Signature Research Centers
The 2003 Legislature allocated funding for the administration of the Signature Research Centers.
Sponsored Research (excluding indirect cost recovery)
Provides support for research as an incentive to institutions to attract additional sponsored research to the campuses. Support levels were originally calculated on the basis of four percent of selected base sponsored research levels plus a biennial inflation component; however, they are currently reduced based on state dollars available.

State Appropriations
State General Funds are appropriated to OUS biennially by the legislature. The distribution of these funds to the campuses is developed in compliance with legislative budget notes and board policy. Funds are allocated through the OUS Resource Allocation Model.

Targeted Programs
Targeted programs generally provide funding to support policy decisions, those areas not reached through cell funding, or those areas in need of enhanced funding due to extraordinarily high program costs or other factors. Targeted programs are mission-based rather than enrollment driven.

Tuition
- Academic Year - Charges assessed to students during the academic year are comprised of the following fee structure that includes: Tuition, Building, Incidental and Health Services. The revenue generated by each component is dedicated to a specific purpose, independent of the other components. Enrollments during the academic year are generally referred to as “in-load” enrollments.
- Extended Campus - Tuition and fees for ECampus are assessed regardless of residency or course load. Rates are set at levels necessary to cover the direct costs of providing the course plus an indirect cost recovery for administrative overhead. Tuition and fees are charged to participating students apart from enrollment fees paid for other courses.
- Summer Term - As with the academic year, tuition supports the direct instruction and administrative costs of the summer session program.

Veterinary Medicine Four Year Program
Funds provided by the Legislature to implement the full four-year program for Veterinary Medicine.