



# Education and General Fund Budget

Fiscal Year 2013

July 1, 2012 - June 30, 2013

Prepared by:

Oregon State University  
Office of Budget and Fiscal Planning  
510 Kerr Administration Building  
Corvallis, Oregon 97331

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**Oregon State University  
Education & General Fund Budget  
Fiscal Year 2013**

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



## Introduction

### 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

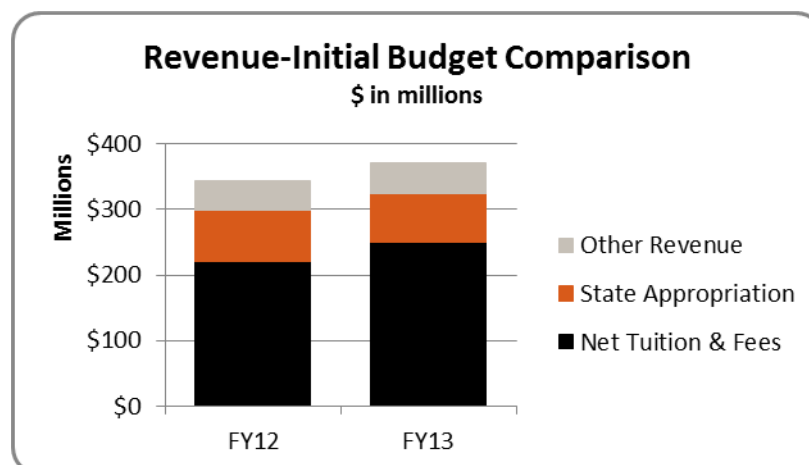
In FY2007, after a two-year process of examining its E&G budget allocations, the university introduced a revised, distributed budget model. The budget review process analyzed sources and uses of funds for each academic unit, linking revenues and expenses explicitly to generating units. The budget approach 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.

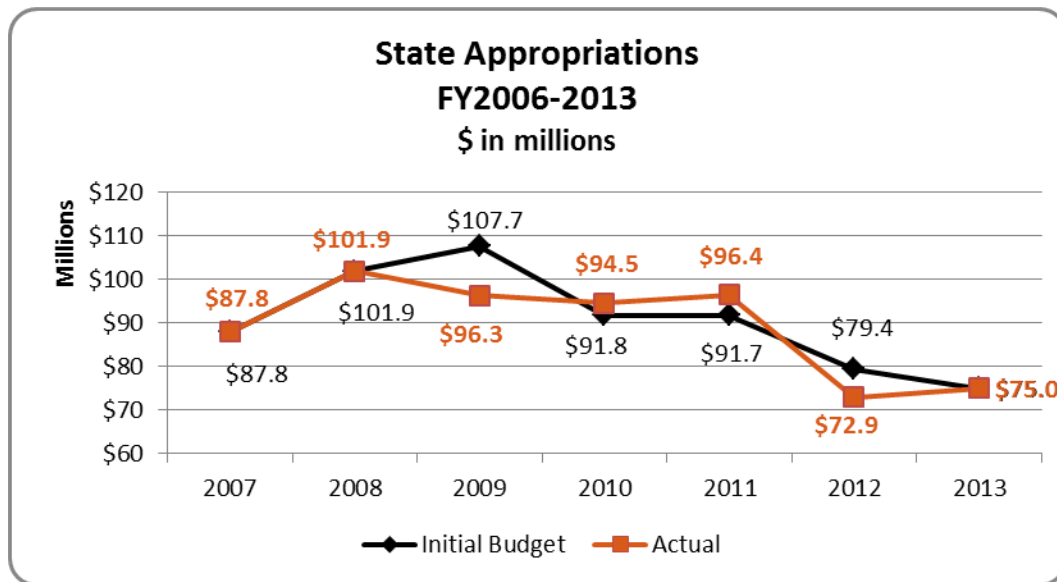
In FY2013, \$4.0 million has been directed to academic units experiencing enrollment growth, providing funding for new faculty hires. A total of \$9.3 million were committed to fully fund mid-year raises in FY2012 and to provide mid-year adjustments in FY2013 to address compression in salaries in the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

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Respectfully submitted,



Sherman Bloomer, Director  
Office of Budget & Fiscal Planning

Oregon State University Multi-Year Revenue Detail	FY12			FY13			
	Initial Budget	Actual	% VAR	Distributed Resources	Departmental Resources	Total	Budget Change
Undergraduate	\$ 32,689,776	\$ 32,689,775	0.0%	\$ 34,348,555	-	\$ 34,348,555	5.1%
Graduate	22,134,738	22,134,738	0.0%	22,561,454	-	22,561,454	1.9%
Enrollment Growth Funding & Retention Incentives	-	796,864		143,614	-	143,614	-
Cell Funding	54,824,514	55,621,377	1.5%	57,053,623	-	57,053,623	4.1%
Targeted Programs:							
11-13 Regional Support	146,608	146,608	0.0%		152,591	152,591	-
Facilities Services: SWPS Buildings/Maintenance	1,588,888	1,588,888	0.0%	1,653,740		1,653,740	1028.0%
Sponsored Research Support	1,886,485	1,886,485	0.0%	1,963,484		1,963,484	4.1%
Research Faculty Salary Support	527,264	527,264	0.0%	548,785		548,785	4.1%
Campus Public Service Programs	800,085	800,085	0.0%		832,742	832,742	4.1%
Systemwide Information Technology Services	1,982,421	1,982,421	0.0%		2,063,337	2,063,337	4.1%
Systemwide Expenses/Programs:							
Endowment Match	646,153	646,153	0.0%	(1,229,836)	1,902,363	672,527	4.1%
Orbis	47,166	47,165	0.0%		49,090	49,090	4.1%
Oregon Joint Schools of Professional Business	76,352	76,352	0.0%		79,468	79,468	4.1%
Department of Justice Legal Services	104,165	104,165	0.0%	108,417		108,417	4.1%
Faculty Diversity	59,123	59,123	0.0%	61,536		61,536	4.1%
Services to Students with Disabilities	69,989	69,989	0.0%		72,846	72,846	4.1%
Engineering - ETIC	7,204,811	7,204,811	0.0%		7,498,884	7,498,884	4.1%
Engineering Resident Graduates	1,972,528	1,972,528	0.0%	2,019,524		2,019,524	2.4%
Engineering Tech Undergraduates	344,642	344,642	0.0%		402,932	402,932	16.9%
Signature Research Centers	201,064	201,064	0.0%		209,270	209,270	4.1%
Natural Resource Funding	178,597	178,597	0.0%		185,887	185,887	4.1%
Climate Center	139,993	139,993	0.0%		145,708	145,708	4.1%
Vet Diagnostic Lab	291,397	291,397	0.0%		303,291	303,291	4.1%
Targeted Programs	18,267,731	18,267,730	0.0%	5,125,650	13,898,409	19,024,059	4.1%
Reduction for Interest Revenue	(1,024,430)	(1,024,430)	0.0%	(1,066,243)	-	(1,066,243)	-
Reserve-State Allocation at 54%/46% - Budget at 49%/51%	7,353,858		0.0%		-	-	-
<b>Subtotal - State Appropriation</b>	<b>79,421,673</b>	<b>72,864,677</b>	<b>-8.3%</b>	<b>61,113,030</b>	<b>13,898,409</b>	<b>75,011,439</b>	<b>-5.6%</b>
Tuition:							
OSU - Corvallis	198,271,322	199,269,924	0.5%	224,916,770		224,916,770	13.4%
Extended Campus	30,656,585	27,836,463	-9.2%		34,335,169	34,335,169	12.0%
Summer Term	6,500,000	7,546,112	16.1%		9,549,876	9,549,876	46.9%
<b>Subtotal - Tuition</b>	<b>235,427,907</b>	<b>234,652,499</b>	<b>-0.3%</b>	<b>224,916,770</b>	<b>43,885,045</b>	<b>268,801,815</b>	<b>14.2%</b>
<b>Tuition Waivers</b>	<b>(24,692,791)</b>	<b>(25,321,421)</b>	<b>2.5%</b>	<b>(28,207,093)</b>	<b>(600,000)</b>	<b>(28,807,093)</b>	<b>16.7%</b>
Student Fees:							
Resource Fees	2,150,000	2,638,168	22.7%		2,385,000	2,385,000	10.9%
Other Student Fees	7,571,231	8,242,105	8.9%		7,962,415	7,962,415	5.2%
<b>Subtotal - Student Fees</b>	<b>9,721,231</b>	<b>10,880,273</b>	<b>11.9%</b>	<b>-</b>	<b>10,347,415</b>	<b>10,347,415</b>	<b>6.4%</b>
Other Resources:							
Indirect Cost Recovery / Returned Overhead	35,000,000	38,304,399	9.4%	11,946,858	26,053,142	38,000,000	8.6%
OUS Portion of Indirect Cost Recovery	(1,400,000)	(1,532,012)	9.4%		(1,520,000)	(1,520,000)	8.6%
Bldg Use Crdts & Audit Disallowed Portion of Indirect Cost Recovery	(1,400,000)	(1,532,176)	9.4%		(1,520,000)	(1,520,000)	-
Sales & Services / Misc Income	8,573,260	15,832,944	84.7%		8,951,956	8,951,956	4.4%
Earned Interest on Accounts Receivable	2,528,963	1,892,919	-25.2%	2,000,000	-	2,000,000	-20.9%
Debt Service Support on SLP Loans	-	544,336	-	550,000	-	550,000	-
<b>Subtotal - Other Resources</b>	<b>43,302,223</b>	<b>53,510,410</b>	<b>23.6%</b>	<b>13,946,858</b>	<b>31,965,098</b>	<b>46,461,956</b>	<b>7.3%</b>
<b>Total Revenue</b>	<b>\$ 343,180,243</b>	<b>\$ 346,586,438</b>	<b>1.0%</b>	<b>\$ 271,769,565</b>	<b>\$ 99,495,967</b>	<b>\$ 371,815,532</b>	<b>8.3%</b>

**Oregon State University**  
**FY13 Revenue Summary with Comparison to FY12**  
(thousands of dollars)

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

\*Excluding OSU-Cascades and Statewide Public Services

**Oregon State University**  
**FY13 Budget Allocation Summary with Comparison to FY12**  
(thousands of dollars)

	FY12 Initial Budget	FY13 Initial Budget			Pct Chg
		Base Budget	Targeted and Departmental	FY13 Initial Budget	
<b><u>Centrally Administered Funds</u></b>					
Pools and Reserves	\$ 4,986	\$ -	( 3,473)	(\$ 3,473)	-169.7%
Agencies Outside OSU E&G Budget	13,084	-	14,321	14,321	9.4%
Distributions to Academic Units	14,657		20,798	20,798	41.9%
Distributions to Administrative Units	3,319		2,616	2,616	-21.2%
<i>Centrally Administered Funds Total</i>	<b>36,046</b>	-	34,262	<b>34,262</b>	-4.9%
<b><u>Direct Instruction and Research Delivery</u></b>					
Agricultural Sciences	10,884	7,006	7,747	14,753	35.5%
Business	10,356	10,363	5,291	15,653	51.1%
Engineering	31,205	18,353	18,364	36,717	17.7%
Forestry	3,693	2,564	2,632	5,197	40.7%
Public Health & Human Sciences	15,333	10,138	5,686	15,824	3.2%
Education	2,251	2,398	2,021	4,419	96.3%
Liberal Arts	24,306	21,051	12,603	33,654	38.5%
Earth, Ocean & Atmospheric Sciences	6,419	6,671	4,439	11,110	73.1%
Pharmacy	8,944	8,811	862	9,674	8.2%
Science	30,374	19,586	12,131	31,717	4.4%
Veterinary Medicine	17,494	11,763	7,204	18,967	8.4%
Summer Session	531	( 12)	1,577	1,565	194.5%
University Honors College	1,639	1,710	123	1,833	11.9%
Extended Campus	28,411	( 2,692)	17,831	15,139	-46.7%
Building Use and Research Equipment	2,800		3,040	3,040	8.6%
International Programs	4,545	1,142	4,273	5,415	19.1%
Library	10,608	9,501	1,463	10,964	3.4%
Research Programs (Centers/Institutes)	9,767	4,730	5,159	9,889	1.2%
<i>Direct Instr and Research Delivery Total</i>	<b>219,560</b>	133,083	112,446	<b>245,529</b>	11.8%
<b><u>Service, Support, and Management:</u></b>					
Facilities Services	23,130	23,758	602	24,360	5.3%
Office of the President	3,380	4,445	16	4,461	32.0%
University Relations & Marketing	2,894	2,474	70	2,545	-12.1%
University Business Centers	7,724	8,802		8,802	14.0%
Finance and Administration	9,210	8,722	1,771	10,493	13.9%
Graduate School	3,357	1,739	2,159	3,898	16.1%
Research Administration	1,951	2,367		2,367	21.3%
Provost	9,372	2,371	4,375	6,746	-28.0%
Academic Affairs	5,006	5,097	434	5,531	10.5%
Student Affairs	11,817	8,540	4,086	12,625	6.8%
Information Services	9,732	7,577	2,619	10,196	4.8%
<i>Service, Support, and Management Total</i>	<b>87,574</b>	75,894	16,131	<b>92,025</b>	5.1%
Distributable Budget and Targeted Programs	<b>307,134</b>	208,977	128,577	<b>337,554</b>	9.9%
<b>Total Budget</b>	<b>\$ 343,180</b>	<b>\$ 208,977</b>	<b>\$ 162,839</b>	<b>\$ 371,816</b>	8.3%

## Oregon State University

### Distribution of Centrally Administered Funds

	FY2012	FY2013		
	Initial Budget	Initial Budget	Over (Under) \$	%
Reserve-State Allocation 54%/46%	\$ 7,353,858	\$ -	\$ (7,353,858)	
Settle-up Reserves	7,239,424	9,527,498	2,288,074	31.6%
Technology Resource Funding	7,405,691	7,527,021	121,330	1.6%
Faculty & Dean Hiring	3,171,131	6,370,828	3,199,697	100.9%
Staff, Grad, Salary raises/costs	2,200,000	5,470,000	3,270,000	148.6%
Debt Service	3,014,981	3,712,637	697,656	23.1%
Foundation Obligation/Capital Campaign	3,035,000	3,535,000	500,000	16.5%
Access Funding	3,000,000	3,000,000	-	-
External (OUS, City & Other)	2,509,332	2,928,096	418,764	16.7%
INTO Obligation	1,810,864	2,810,864	1,000,000	55.2%
Facilities	4,621,000	2,424,032	(2,196,968)	-47.5%
Tuition Models Central Reserves	720,331	2,099,510	1,379,179	191.5%
Research Investment	300,000	2,000,000	1,700,000	566.7%
Other	2,519,682	1,874,432	(645,250)	-25.6%
IT Investments	1,350,000	730,000	(620,000)	-45.9%
Due from Other Funds	(4,288,996)	(5,132,143)	(843,147)	19.7%
Internal Short-Term Loan	(9,916,247)	(14,615,900)	(4,699,653)	47.4%
<b>Total</b>	<b>\$ 36,046,051</b>	<b>\$ 34,261,875</b>	<b>\$ (1,784,176)</b>	<b>-4.9%</b>

### FY13 Target Funding to Units

	Endowment	Legislative	OSU Targets		
	Match	Target	Diff Tuition	Prov Fac Mtch	Other
Agricultural Sciences	\$ 279,237	\$ -	\$ -	\$ 147,500	\$ 1,000,000 <sup>1</sup>
Business	152,097	79,468	750,000	45,000	200,000
Engineering	77,012	8,111,086	2,563,000	217,500	-
Forestry	435,081	-	80,000	135,000	300,000 <sup>1</sup>
Public Health & Human Sciences	112,879	-	40,000	225,000	-
Education	-	-	-	-	45,000
Liberal Arts	332,709	-	-	-	-
Earth, Ocean & Atmosph Sciences	19,657	145,708	-	-	-
Pharmacy	-	-	240,000	-	37,740
Science	226,197	-	-	57,500	-
Veterinary Medicine	-	1,136,033	400,000	45,000	-
Honors College	-	-	100,000	-	-
Extended Campus - Outreach & Engagement	-	-	-	-	700,000 <sup>1</sup>
University Libraries	110,727	49,090	-	-	-
Research Centers & Institutes	156,767	185,887	-	-	490,000
University Relations & Mktg	-	-	-	-	70,173
Finance & Administration	-	-	-	-	600,000
Graduate School	-	-	-	-	1,030,000
Provost Pass-Thru	-	-	-	-	4,375,000
Student Affairs	-	72,846	-	-	38,000
Information Services	-	2,215,928	-	-	-
<b>Total</b>	<b>\$ 1,902,363</b>	<b>\$ 11,996,046</b>	<b>\$ 4,173,000</b>	<b>\$ 872,500</b>	<b>\$ 8,885,913</b>

<sup>1</sup>Statewide Public Services support

OREGON STATE UNIVERSITY 2012-13 INITIAL BUDGET		Base Budget	Legislatively Targeted Prog & Contractual	Extended Campus	Summer Session	INTO	Student Fees Sales & Service	Grad Fee Remissions	ICR	FY13 Initial Budget	
Centrally Administered Funds											
1	Pools and Reserves	\$ 490,255	\$ 12,384,088	\$ 311,905	\$ 885,899	411,451	\$ -	\$ 3,519,838	\$ 1,937,660	\$ 19,941,096	1
2	Transfers to Agencies Outside OSU E&G Budget	-	14,320,779	-	-	-	-	-	-	14,320,779	2
Direct Instruction & Research Delivery											
3	Agricultural Sciences	7,005,524	1,426,737	2,124,696	355,053	77,179	442,000	871,470	2,450,000	14,752,659	3
4	Business	10,362,558	1,226,565	688,251	583,925	1,990,292	500,000	286,794	15,000	15,653,385	4
5	Engineering	18,352,667	10,968,598	410,356	598,095	1,398,146	494,700	2,793,972	1,700,000	36,716,534	5
6	Forestry	2,564,337	950,081	677,287	162,574	-	76,000	333,432	433,000	5,196,711	6
7	Public Health & Human Sciences	10,138,397	377,879	1,152,174	778,073	336,854	1,220,000	1,170,801	650,000	15,824,178	7
8	Education	2,398,423	45,000	1,234,114	333,732	-	76,000	322,065	10,000	4,419,334	8
9	Liberal Arts	21,050,815	332,709	6,919,576	1,437,854	1,087,978	823,000	1,989,225	13,000	33,654,157	9
10	Earth, Ocean & Atmospheric Sciences	6,671,044	165,365	656,789	179,505	100,000	86,000	450,891	2,800,000	11,109,594	10
11	Pharmacy	8,811,447	277,740	2,006	42,288	-	105,000	250,074	185,000	9,673,555	11
12	Science	19,586,301	283,697	3,470,769	2,349,495	1,549,661	920,000	2,557,575	1,000,000	31,717,498	12
13	Veterinary Medicine	11,762,832	1,581,033	-	-	-	5,438,749	34,101	150,000	18,966,715	13
14	Summer Session	(12,211)	-	-	1,576,782	-	-	-	-	1,564,571	14
15	University Honors College	1,710,445	100,000	-	4,286	-	7,250	11,367	-	1,833,348	15
16	Extended Campus - Outreach & Engagement	(503,041)	700,000	8,823,395	-	-	-	-	-	9,020,354	16
17	Extended Campus - Allocation to Depts	(2,189,272)	-	8,308,094	-	-	-	-	-	6,118,822	17
18	Extended Campus - Productivity Distribution	-	-	-	-	-	-	-	-	-	18
19	Research Equipment Reserve	-	-	-	-	-	-	-	3,040,000	3,040,000	19
20	International Programs - OSU	1,142,059	-	-	-	828,434	536,922	-	-	2,507,415	20
21	International Programs - OUS	-	-	-	-	-	2,907,152	-	-	2,907,152	21
22	University Libraries	9,501,281	159,817	143,651	-	282,024	109,700	-	768,000	10,964,473	22
23	Research (Centers / Institutes / Programs)	4,729,668	832,654	-	4,978	-	380,030	-	3,941,340	9,888,670	23
24	Direct Instruction & Research Delivery Total	133,083,274	19,427,875	34,611,158	8,406,640	7,650,568	14,122,503	11,071,767	17,155,340	245,529,125	24
Service, Support, and Management											
25	Facilities Services	13,322,871	-	-	-	491,899	25,000	-	-	13,839,770	25
26	Energy Operations	10,435,315	-	-	-	-	85,000	-	-	10,520,315	26
27	Office of the President	4,445,216	-	-	-	-	16,000	-	-	4,461,216	27
28	University Relations & Marketing	2,474,469	70,173	-	-	-	-	-	-	2,544,642	28
29	University Business Centers	8,802,183	-	-	-	-	-	-	-	8,802,183	29
30	Finance and Administration	8,721,985	600,000	-	-	329,359	841,868	-	-	10,493,212	30
31	Graduate School	1,739,375	1,030,000	48,468	63,313	46,341	762,000	208,395	-	3,897,892	31
32	Research Administration	2,366,874	-	-	-	-	-	-	-	2,366,874	32
33	Provost	975,561	-	-	-	-	-	-	-	975,561	33
34	Provost - Pass-through	1,395,434	4,375,000	-	-	-	-	-	-	5,770,434	34
35	Academic Affairs	5,097,067	-	1,448	94,024	303,163	35,000	-	-	5,530,702	35
36	Student Affairs	8,539,690	110,846	143,651	-	444,045	3,387,000	-	-	12,625,232	36
37	Information Services	7,577,491	2,215,928	143,651	-	234,429	25,000	-	-	10,196,499	37
38	Service, Support, and Management Total	75,893,531	8,401,947	337,218	157,337	1,849,236	5,176,868	208,395	-	92,024,532	38
39	Total Educational and General Budget	\$209,467,060	\$ 54,534,689	\$ 35,260,281	\$ 9,449,876	\$ 9,911,255	\$ 19,299,371	\$ 14,800,000	\$ 19,093,000	\$ 371,815,532	39





**Oregon State University**  
Base Budget Final  
Fiscal Year 2013

	FY12	FY13					
	Beginning	FY12 Salary Increases	New Faculty Hires 2010-11	New Faculty Hires 2011-12	Reorganizations	Adjustments	Total Base
<u>Institutional Management</u>	-	-	-	-	-	\$ 490,255	\$ 490,255
<u>Instruction &amp; Research</u>							
Agricultural Sciences	6,618,375	273,388	113,761				7,005,524
Business	7,970,071	390,149	-	118,757	1,666,329	217,252	10,362,558
Engineering	16,621,719	436,662	253,593	379,553	-	661,140	18,352,667
Forestry	2,196,452	83,796	122,627	113,687		47,775	2,564,337
Public Health & Human Sciences	11,133,201	289,965	-	-	(1,383,204)	98,435	10,138,397
Education	1,531,050	108,548	-	-	758,825	-	2,398,423
Liberal Arts	19,609,934	793,612	83,307	647,087	(283,125)	200,000	21,050,815
Earth, Ocean & Atmospheric Sciences	3,551,480	265,227	-		2,554,337	300,000	6,671,044
Pharmacy	8,130,787	233,644	-	200,788		246,228	8,811,447
Science	21,890,398	584,642		447,143	(3,313,162)	(22,720)	19,586,301
Veterinary Medicine	10,837,806	366,464	-	-	-	558,562	11,762,832
Summer Session	(12,211)	-	-	-	-	-	(12,211)
University Honors College	1,536,629	31,736				142,080	1,710,445
Extended Campus	(503,041)	-	-	-	-	-	(503,041)
Extended Campus - Allocation to Depts	(1,699,017)	-	-	-	-	(490,255)	(2,189,272)
Extended Campus - Productivity Distribution	-						-
International Programs - OSU	1,092,687	49,372	-	-	-	-	1,142,059
University Libraries	9,273,723	227,558	-	-	-	-	9,501,281
Research (Centers / Institutes / Programs)	4,520,042	209,626					4,729,668
Instruction & Research Total	124,300,085	4,344,389	573,288	1,907,015	-	1,958,497	133,083,274
<u>Service, Support, and Management</u>							
Facilities Services	12,144,185	339,604.00				839,082	13,322,871
Energy Operations	10,404,565	30,750	-	-	-	-	10,435,315
Office of the President	3,363,626	125,560	-	-	-	956,030	4,445,216
University Advancement	2,379,383	95,086.00					2,474,469
University Business Centers	7,725,868	513,760	-	-	-	562,555	8,802,183
Finance and Administration	8,261,279	460,706	-	-	-	-	8,721,985
Graduate School	1,534,641	54,734.00				150,000	1,739,375
Research Administration	1,950,838	116,036	-	-	-	300,000	2,366,874
Provost	943,201	32,360	-	-	-	-	975,561
Provost Pass-through	568,834	26,600.00				800,000	1,395,434
Academic Affairs	4,700,379	146,688	-	-	-	250,000	5,097,067
Student Affairs	8,151,413	260,277	-	-	-	128,000	8,539,690
Information Services	7,314,045	263,446.00					7,577,491
Service, Support, and Management Total	69,442,257	2,465,607	-	-	-	3,985,667	75,893,531
Total	\$ 193,742,342	\$ 6,809,996	\$ 573,288	\$ 1,907,015	-	\$ 6,434,419	\$ 209,467,060

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

	State General & Federal ARRA Funding		Other Funds Limited	Total
<b>Current Biennium - 2011-2013</b>				
OSU - Corvallis	\$	147,876,116	\$ 562,628,319	\$ 710,504,435
OSU - Cascades		8,298,637	8,903,725	17,202,362
Agricultural Experiment Station		51,793,494	11,342,000	63,135,494
OSU Extension Service		37,463,402	23,913,899	61,377,301
Forest Research Laboratory		5,698,684	8,136,650	13,835,334
<b>Total Legislative Authorized Budget (LAB)</b>	<b>\$</b>	<b>251,130,333</b>	<b>\$ 614,924,593</b>	<b>\$ 866,054,926</b>
<b>Prior Biennium - 2009-2011</b>				
OSU - Corvallis	\$	186,422,752	\$ 398,102,575	\$ 584,525,327
OSU - Cascades		9,247,069	6,384,003	15,631,072
Agricultural Experiment Station		55,245,966	10,757,155	66,003,121
OSU Extension Service		40,364,376	20,320,480	60,684,856
Forest Research Laboratory		6,019,633	7,408,582	13,428,215
<b>Total Legislative Authorized Budget (LAB)</b>	<b>\$</b>	<b>297,299,796</b>	<b>\$ 442,972,795</b>	<b>\$ 740,272,591</b>

**Oregon State University**  
**Budgeted Operations by Unit**  
**Fiscal Year 2013 Expenditure Budget**

	OSU - Corvallis Education & General *	OSU - Cascades Education & General *	Agricultural Experiment Station *	OSU Extension Service *	Forest Research Laboratory *	Designated Operations & Royalties	Service Departments	Auxiliary Enterprise	Gifts	Grants & Contracts	Total
	<019999	001801	030xxx	034xxx	037xxx	05-06xxxx	09xxxx	1xxxxx	M-FSxxxx		
Executive Office	\$ 4,461,216	-	-	-	-	\$ 150,594	\$ -	-	\$ 587,953	\$ 128	\$ 5,199,891
University Relations & Marketing	2,544,642	-	-	-	-	-	-	-	211,134	-	2,755,776
Provost & Executive VP	2,745,995	-	-	-	-	-	-	-	34,779	-	2,780,774
Academic Affairs	5,530,702	-	-	-	-	-	-	8,600	67,362	780,307	6,386,971
University Libraries	10,964,473	-	-	-	-	-	-	-	591,820	35,662	11,591,955
Information Services	10,196,499	-	-	-	-	444,578	11,954,363	-	605,831	35,120	23,236,391
Graduate School	3,897,892	-	-	-	-	477,293	-	1,100	218,876	804,729	5,399,890
Extended Campus	15,139,176	-	-	-	-	457,815	-	-	-	-	15,596,991
Summer Session	1,564,571	-	-	-	-	225,232	-	-	-	-	1,789,803
OSU Extension Service	-	-	-	17,921,801	-	-	-	-	293,137	1,195,560	19,410,497
Research Admin & Research Centers	12,255,544	-	339,693	681,023	-	4,398,755	2,076,514	241,325	2,050,926	22,717,792	44,761,572
Student Affairs	12,625,232	-	-	-	-	108,000	-	67,573,499	8,921,534	223,145	89,451,410
International Programs	5,414,567	-	-	-	-	1,222,684	-	-	120,494	-	6,757,745
University Honors College	1,833,348	-	-	-	-	-	-	-	127,891	127,342	2,088,581
Cascades Campus	-	9,149,280	-	-	-	-	-	-	242,360	15,752	9,407,392
Agricultural Sciences	14,752,659	-	31,116,134	9,677,815	-	7,542,997	-	1,000,336	2,053,447	54,492,549	120,635,937
Veterinary Medicine	18,966,715	-	681,076	-	-	-	-	-	833,395	2,816,880	23,298,066
Forestry	5,196,711	-	42,967	2,001,732	6,927,000	244,599	936,000	27,700	5,502,966	14,266,367	35,146,042
Liberal Arts	33,654,157	-	-	-	-	19,278	-	-	742,847	696,609	35,112,891
Science	31,717,498	-	-	-	-	586,040	384,800	-	1,849,649	22,198,634	56,736,621
Earth, Ocean & Atmospheric Sciences	11,109,594	-	-	-	-	693,620	-	2,300	223,429	32,478,566	44,507,509
Business	15,653,385	-	-	-	-	350,082	-	-	1,412,648	1,429,015	18,845,130
Engineering	36,716,534	-	-	-	-	800,642	-	-	6,877,275	31,409,623	75,804,074
Education	4,419,334	-	-	-	-	-	-	-	206,512	510,014	5,135,861
Public Health and Human Sciences	15,824,178	-	310,079	5,974,880	-	2,468,920	-	125,400	701,653	15,297,939	40,703,049
Pharmacy	9,673,555	-	-	-	-	55,000	-	1,063,680	292,494	3,536,709	14,621,438
University Business Centers	8,802,183	-	-	-	-	-	-	-	-	-	8,802,183
Finance and Administration	10,493,212	-	-	-	-	-	8,159,017	1,895,248	7,435,696	-	27,983,173
Facilities	24,360,085	-	-	-	-	-	-	2,907,059	-	-	27,267,144
Athletics	4,000,000	-	-	-	-	-	-	42,337,203	9,822,213	-	56,159,416
Institutional Management	37,301,875	165,022	(696,353)	(5,102,017)	134,329	50,000	-	21,410,952	237,073	-	53,500,881
<b>TOTAL</b>	<b>\$ 371,815,532</b>	<b>\$ 9,314,302</b>	<b>\$ 31,793,596</b>	<b>\$ 31,155,234</b>	<b>\$ 7,061,329</b>	<b>\$ 20,296,129</b>	<b>\$ 23,510,694</b>	<b>\$ 138,594,402</b>	<b>\$ 52,265,395</b>	<b>\$ 205,068,441</b>	<b>\$ 890,875,054</b>

\*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 1**  
**PROPOSED FISCAL YEAR 2012-13 OUS OPERATING BUDGET**  
**ALL SOURCES**

	Allocation of State Funding		Estimated Campus Revenues		Total All Funds
	General Fund	Lottery Funds <sup>1</sup>	E&G Other Funds <sup>2</sup>	Other Funds <sup>3</sup>	
<b>Education and General Program</b>					
EOU	13,358,765	337,750	20,336,385	20,092,000	54,124,900
OIT	15,503,192	337,750	22,679,823	21,919,968	60,440,733
OSU - Corvallis	75,011,439	949,828	295,654,093	402,500,638	774,115,998
OSU-Cascades	4,249,500	-	4,993,015	550,000	9,792,515
PSU	54,286,290	847,060	274,560,556	218,159,946	547,853,852
SOU	13,164,346	337,750	38,116,000	43,599,288	95,217,384
UO	46,268,462	985,336	381,756,267	436,415,000	865,425,065
WOU	13,690,509	430,936	40,492,800	54,328,400	108,942,645
System Office	5,589,996	-	4,250,000	18,557,000	28,396,996
Industry Affairs/OMI/ETIC/Other <sup>4</sup>	7,163,851	-			7,163,851
<b>Subtotal Education and General Program</b>	<b>248,286,350</b>	<b>4,226,410</b>	<b>1,082,838,939</b>	<b>1,216,122,240</b>	<b>2,551,473,939</b>
<b>Statewide Public Services:</b>					
Agricultural Experiment Station	26,414,682		5,900,000	58,000,000	90,314,682
Extension Service	19,106,335		12,048,899	5,300,000	36,455,234
Forest Research Laboratory	2,906,329		4,300,000	12,000,000	19,206,329
<b>Subtotal Statewide Public Services</b>	<b>48,427,346</b>		<b>22,248,899</b>	<b>75,300,000</b>	<b>145,976,245</b>
<b>2012-13 Total Operating Budget</b>	<b>296,713,696</b>	<b>4,226,410</b>	<b>1,105,087,838</b>	<b>1,291,422,240</b>	<b>2,697,450,184</b>
<b>2012-13 Debt Service</b>	<b>43,419,460</b>	<b>7,506,769</b>		<b>106,209,945</b>	<b>157,136,174</b>
<b>2012-13 Capital Construction<sup>5</sup></b>					<b>-</b>
<b>2012-13 Total Budget</b>	<b>340,133,156</b>	<b>11,733,179</b>	<b>1,105,087,838</b>	<b>1,397,632,185</b>	<b>2,854,586,358</b>
1) SB 5702 directed specific reductions to the athletics portion of UO and OSU Sports Lottery funding:					
Original Biennial Lottery Funding		8,825,680			
Less specific reductions in SB 5702:					
UO	(118,613)				
OSU	(114,347)	(232,960)			
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 know 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.					



**Oregon University System**  
**State General Fund Appropriations**

**2012-13 Detail Allocation (includes - 2012 Enrollment Settle-up Adjustments)**

	EOU	OIT	OSU	OSU-CC	PSU	SOU	UO	WOU	Total Campuses	Operations	Other	E & G	Statewides	OUS
1 Undergraduate Funding	6,752,124	6,161,545	34,348,555	887,041	35,545,724	7,418,275	24,564,848	9,380,213	125,058,325	-	-	125,058,325	-	125,058,325
2 Graduate Funding	668,779	50,065	22,561,454	300,113	12,625,804	1,217,700	13,679,387	1,082,963	52,186,265	-	-	52,186,265	-	52,186,265
3 Enrollment Funding	7,420,903	6,211,610	56,910,009	1,187,154	48,171,528	8,635,975	38,244,235	10,463,176	177,244,590	-	-	177,244,590	-	177,244,590
4 Incentives for Student Success	-	-	-	-	-	-	-	-	-	-	3,249,233	3,249,233	-	3,249,233
5 Total Enrollment & Incentive Funding	7,420,903	6,211,610	56,910,009	1,187,154	48,171,528	8,635,975	38,244,235	10,463,176	177,244,590	-	3,249,233	180,493,823	-	180,493,823
6 2012-13 Transition Funding	-	-	-	-	-	-	2,200,000	-	2,200,000	-	-	2,200,000	-	2,200,000
7 2011-12 Settle-up - Enrollment Funding	(158,495)	144,933	143,614	48,964	(841,104)	83,764	1,052,946	(474,622)	-	-	-	-	-	-
8 Total Enroll, Incent & Settle-up Funding	7,262,408	6,356,543	57,053,623	1,236,118	47,330,424	8,719,739	41,497,181	9,988,554	179,444,590	-	3,249,233	182,693,823	-	182,693,823
9 Targeted Programs														
10 Regional Support														
11 Retrenchment	182,097	182,188	-	121,447	-	182,182	-	182,148	850,062	-	-	850,062	-	850,062
12 Retention & Graduation	318,669	318,828	-	212,532	-	318,818	-	318,759	1,487,606	-	-	1,487,606	-	1,487,606
13 Underpinning	318,669	318,828	-	212,532	-	318,818	-	318,759	1,487,606	-	-	1,487,606	-	1,487,606
14 11-13 Regional Support	824,486	824,486	152,591	-	-	984,461	-	630,154	3,416,178	-	-	3,416,178	-	3,416,178
15 Regional Solutions	12,000	-	-	12,000	12,000	-	12,000	-	48,000	-	-	48,000	-	48,000
16 Regional University Funding														
17 Statewide Access	-	776,567	-	-	-	-	-	-	776,567	-	-	776,567	-	776,567
18 Regional University Support Adjustment	2,565,330	2,829,933	-	2,535,317	-	1,492,447	-	1,283,557	10,706,584	-	-	10,706,584	-	10,706,584
19 Regional Univ Support Adj FY12 Settle-up	22,713	(100,088)	-	(80,641)	-	8,128	-	149,888	-	-	-	-	-	-
20 Regional Access	792,939	341,383	-	-	-	256,030	-	85,330	1,475,682	-	-	1,475,682	-	1,475,682
21 Collaborative OUS Nursing Program	22,054	15,180	-	-	-	33,352	-	19,795	90,381	-	-	90,381	-	90,381
22 Total Regional Funding	5,058,957	5,507,305	152,591	3,013,187	12,000	3,594,236	12,000	2,988,390	20,338,666	-	-	20,338,666	-	20,338,666
23 Engineering														
24 Industry Affairs / OMI	-	-	-	-	-	-	-	-	-	-	658,279	658,279	-	658,279
25 ETIC Allocations	175,480	539,532	7,498,884	-	2,924,844	204,418	1,129,108	288,545	12,760,811	-	1,206,850	13,967,661	-	13,967,661
26 Engineering Technology Undergraduate	-	1,005,823	381,105	8,813	4,485	-	-	-	1,400,226	-	-	1,400,226	-	1,400,226
27 Eng. Tech UG - FY 12 Settle-up	-	(11,899)	21,827	(8,618)	(1,310)	-	-	-	-	-	-	-	-	-
28 Engineering Graduate	-	-	2,038,710	-	638,718	-	-	-	2,677,428	-	-	2,677,428	-	2,677,428
29 Eng. Graduate - FY 12 Settle-up	-	-	(19,186)	-	19,186	-	-	-	-	-	-	-	-	-
30 Engineering Funding	175,480	1,533,456	9,921,340	195	3,585,923	204,418	1,129,108	288,545	16,838,465	-	1,865,129	18,703,594	-	18,703,594
31 Research														
32 Sponsored Research	40,127	15,294	1,963,484	-	325,557	30,588	966,549	115,319	3,456,918	-	-	3,456,918	-	3,456,918
33 Faculty Salaries - Research	36,131	60,250	548,785	-	472,503	85,686	643,214	62,914	1,909,483	-	-	1,909,483	-	1,909,483
34 Signature Research	-	-	209,270	-	22,029	-	209,291	-	440,590	-	44,071	484,661	-	484,661
35 Research Funding	76,258	75,544	2,721,539	-	820,089	116,274	1,819,054	178,233	5,806,991	-	44,071	5,851,062	-	5,851,062
36 Institutes / Programs														
37 Campus Public Service Programs	197,182	-	-	-	698,201	87,970	816,116	1,355	1,800,824	-	-	1,800,824	-	1,800,824
38 Dispute Resolution	-	-	-	-	410,159	-	761,768	-	1,171,927	-	-	1,171,927	-	1,171,927
39 Natural Resource Institute (incl Nat Heritage)	-	-	185,887	-	45,710	-	-	-	231,597	-	-	231,597	-	231,597
40 Oregon Solutions	-	-	-	-	1,051,435	-	-	-	1,051,435	-	-	1,051,435	-	1,051,435
41 Climate Center	-	-	145,708	-	-	-	-	-	145,708	-	-	145,708	-	145,708
42 Leadership Institute	-	-	-	-	60,660	-	-	-	60,660	-	-	60,660	-	60,660
43 Health Professions Programs	255,759	2,097,732	-	-	-	352,875	-	285,312	2,991,678	-	-	2,991,678	-	2,991,678
44 Rural Access	234,493	-	-	-	-	-	-	-	234,493	-	-	234,493	-	234,493
45 Clinical Legal Education	-	-	-	-	-	-	-	-	-	-	162,409	162,409	-	162,409
46 Veterinary Diagnostic Lab	-	-	1,136,033	-	-	-	-	-	1,136,033	-	-	1,136,033	-	1,136,033
47 AES	-	-	-	-	-	-	-	-	-	-	-	-	26,414,682	26,414,682
48 ES	-	-	-	-	-	-	-	-	-	-	-	-	19,106,335	19,106,335
49 FRL	-	-	-	-	-	-	-	-	-	-	-	-	2,906,329	2,906,329
50 Bldg. Maintenance / SWPS	-	-	1,653,740	-	-	-	-	-	1,653,740	-	-	1,653,740	-	1,653,740
51 IT Fifth Site/OCATE/Southwest Oregon/OWEN	104,439	-	2,063,337	-	540,062	-	374,757	-	3,082,595	-	-	3,082,595	-	3,082,595
52 Institutes / Programs Funding	791,873	2,097,732	5,184,705	-	2,806,227	440,845	1,952,641	286,667	13,560,690	-	162,409	13,723,099	48,427,346	62,150,445
53 Central Services														
54 System Office Operations	-	-	-	-	-	-	-	-	-	5,862,611	-	5,862,611	-	5,862,611
55 Systemwide Expenses / Programs	87,742	84,736	1,043,884	-	490,192	218,290	950,957	189,084	3,064,885	-	1,843,009	4,907,894	-	4,907,894
56 Central Services Funding	87,742	84,736	1,043,884	-	490,192	218,290	950,957	189,084	3,064,885	5,862,611	1,843,009	10,770,505	-	10,770,505
57 Subtotal Targeted Programs	6,190,310	9,298,773	19,024,059	3,013,382	7,714,431	4,574,063	5,863,760	3,930,919	59,609,697	5,862,611	3,914,618	69,386,926	48,427,346	117,814,272
59 Interest Earnings	(93,953)	(152,124)	(1,066,243)	-	(758,565)	(129,456)	(1,092,479)	(228,964)	(3,521,784)	(272,615)	-	(3,794,399)	-	(3,794,399)
60 Targeted Programs/Other Total	6,096,357	9,146,649	17,957,816	3,013,382	6,955,866	4,444,607	4,771,281	3,701,955	56,087,913	5,589,996	3,914,618	65,592,527	48,427,346	114,019,873
61 Enrollment/Targeted Programs/Other	13,358,765	15,503,192	75,011,439	4,249,500	54,286,290	13,164,346	46,268,462	13,690,509	235,532,503	5,589,996	7,163,851	248,286,350	48,427,346	296,713,696
62 Debt Service	-	-	-	-	-	-	-	-	-	-	43,419,460	43,419,460	-	43,419,460
63 Total (Net Appropriation)	13,358,765	15,503,192	75,011,439	4,249,500	54,286,290	13,164,346	46,268,462	13,690,509	235,532,503	5,589,996	50,583,311	291,705,810	48,427,346	340,133,156



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

#### 2012-13 CELL VALUES AT 100%

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

#### 2012-13 ESTABLISHED CELL VALUES DISCOUNTED

(FOR USE IN ENROLLMENT DRIVEN ALLOCATION CALCULATION OF STATE FUNDS)

	Lower Division Undergraduate	Upper Division Undergraduate	Master's Graduate	PhD Graduate
Level 1	\$ 1,552	\$ 1,998	\$ 2,252	\$ 4,240
Level 1 Priority *	-	-	2,428	4,570
Level 2	1,949	2,494	3,047	5,079
Level 2 Priority *	-	-	3,285	5,474
Level 3	2,791	3,782	4,372	6,404
Level 3 Priority *	-	-	4,713	6,903
Pharmacy *	4,228	4,228	6,189	12,853
Law	-	-	4,814	4,240
Vet Med *	-	-	18,090	-

\* 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.

## Oregon University System Cell Matrix Assignment

Classification of Instructional Programs (CIP)	Cell Level Assignments			
	LD	UD	MA	PhD
01 Agricultural Business	3	3	3	2
02 Agricultural Sciences	3	3	3	2
03 Conservation	1	1	1	1
04 Architecture	3	3	2	1
05 Area, Ethnic, Cultural Studies	1	1	1	1
09 Communications	2	2	2	2
10 Communications Technologies	2	2	2	1
11 Computer and Information Science	2	2	3	3
13 Education	2	2	1	2
14 Engineering	3	3	3	3
15 Engineering-Related Technology	3	3	3	1
16 Foreign Languages and Literature	1	1	2	1
19 Home Economics	2	2	2	2
22 Law and Legal Studies	4	4	4	4
23 English Language and Literature	1	1	2	2
24 Liberal Arts and Sci., Humanities	1	1	1	1
25 Library Science	2	2	1	1
26 Biological Sciences, Life Science	2	2	3	2
27 Mathematics	1	1	3	2
28 Reserve Officers Training Corps	1	1	1	1
29 Military Technologies	1	1	1	1
30 Multi/Interdisc. Studies	2	2	2	3
31 Parks, Rec., Leisure, Fitness Studies	3	3	2	2
32 Basic Skills	1	1	1	1
38 Philosophy and Religious Studies	1	1	1	2
40 Physical Sciences	2	2	3	2
41 Science Technologies	3	3	3	3
42 Psychology	1	1	1	2
43 Protective Services	2	2	1	2
44 Public Administration and Service	2	2	1	2
45 Social Sciences	1	1	1	2
50 Visual and Performing Arts	3	3	2	2
51 Health Professions, Related Science	3	3	2	1
51.20 Pharmacy (broken out of CIP 51)	5	5	5	5
51.24 Veterinary Medicine (broken out of CIP 51)	6	6	6	6
52 Business Mgmt, Admin. Service	2	2	1	3
54 History	1	1	1	2
9999 Unknown	1	1	1	1

**Comparison of OUS RAM Distributions**  
**FY12 Actual and FY13 Initial Budget**  
(Percentage of Total RAM)

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

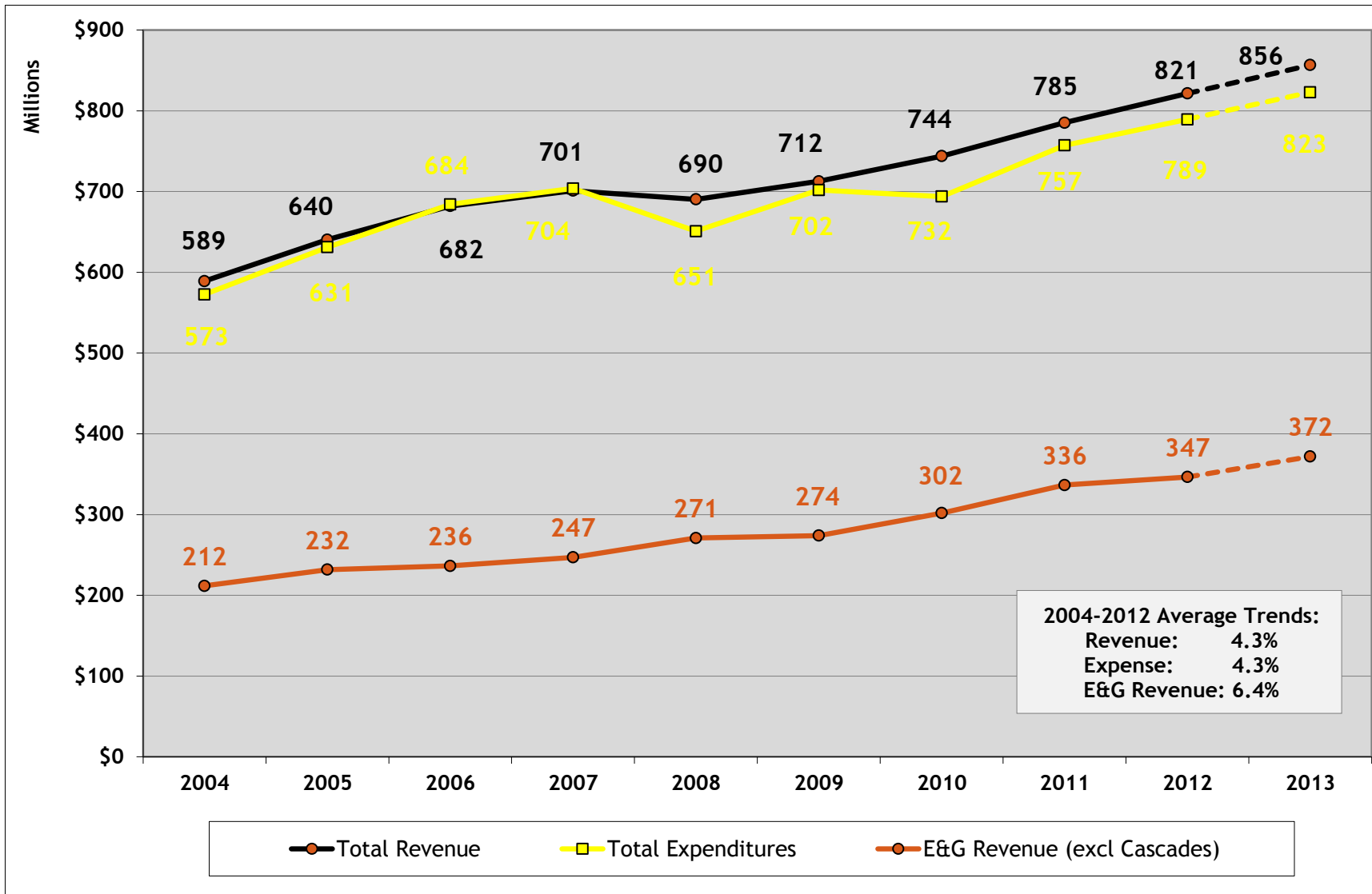
**Oregon State University**  
**Comparison of FY12 Actual and FY13 State Appropriations**

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

# Oregon State University

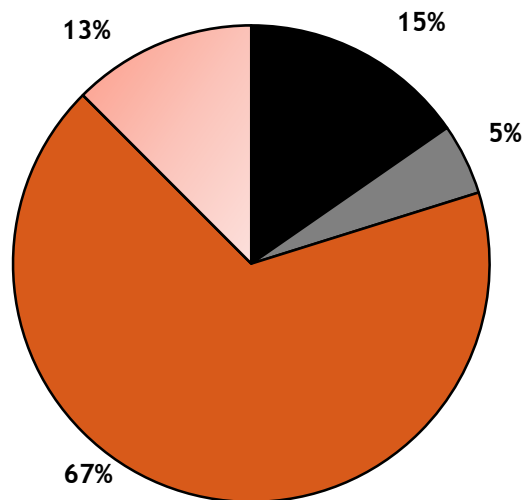
## Growth in Revenues and Expenditures

### Fiscal Years 2004 - 2013



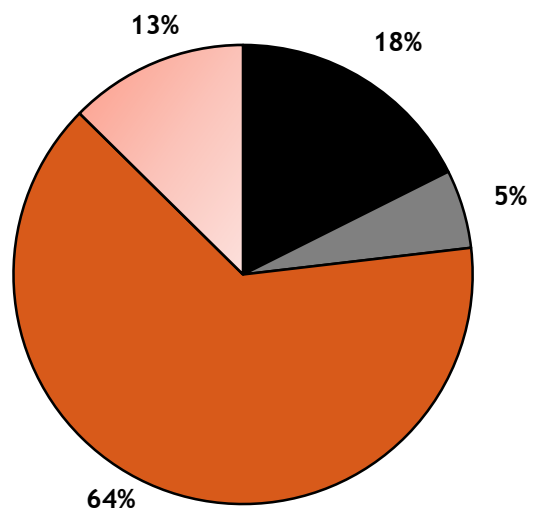
**Oregon State University**  
**FY12 and FY13 E&G Revenue Sources**

**FY13 Initial E&G Budget**  
**Revenues = \$371.8 Million**



■ RAM Funding   ■ Targeted Programs   ■ Net Tuition & Fees   ■ Other Revenue

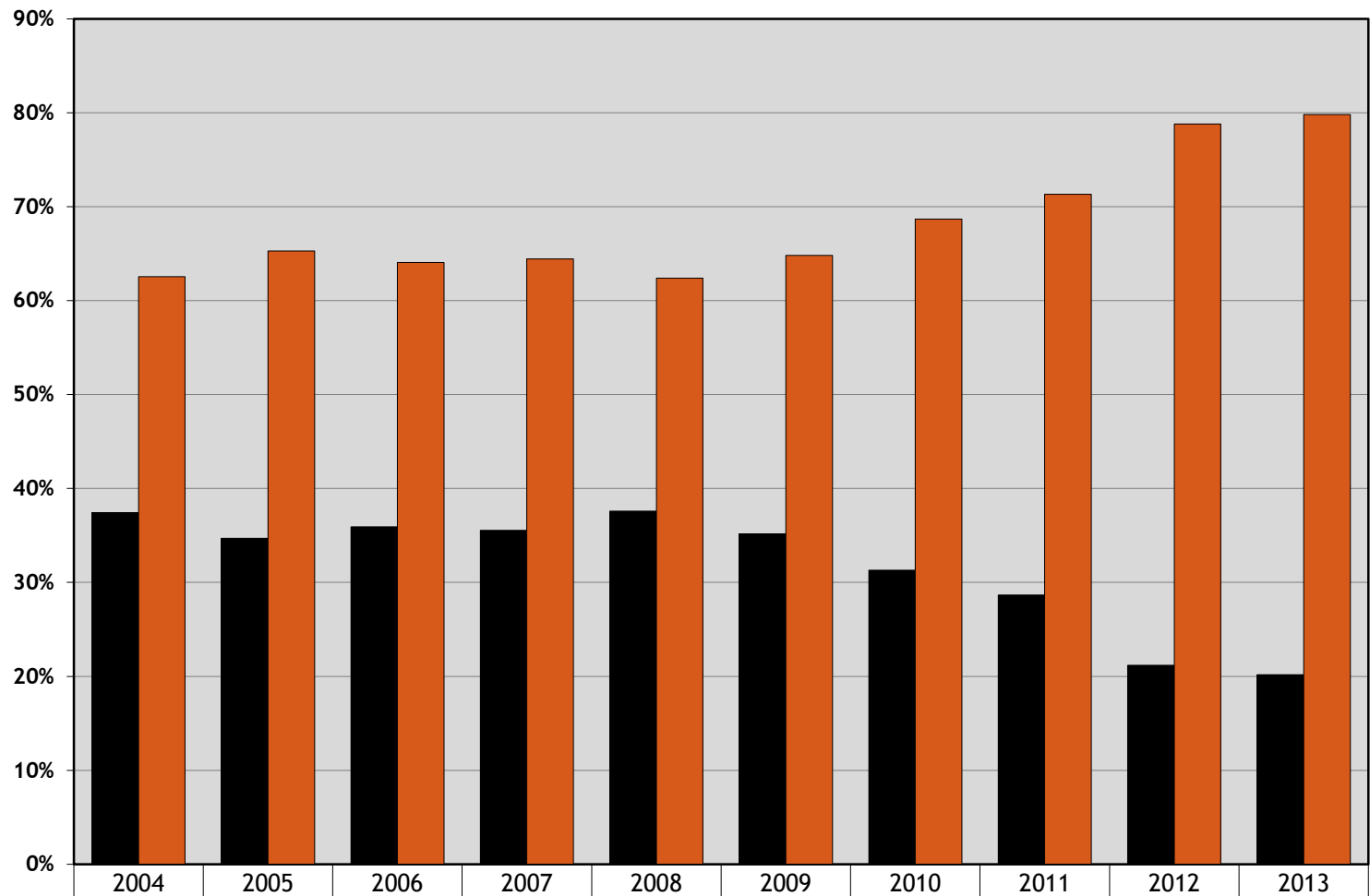
**FY12 Initial E&G Budget**  
**Revenues = \$343.2 Million**



■ RAM Funding   ■ Targeted Programs   ■ Net Tuition & Fees   ■ Other Revenue



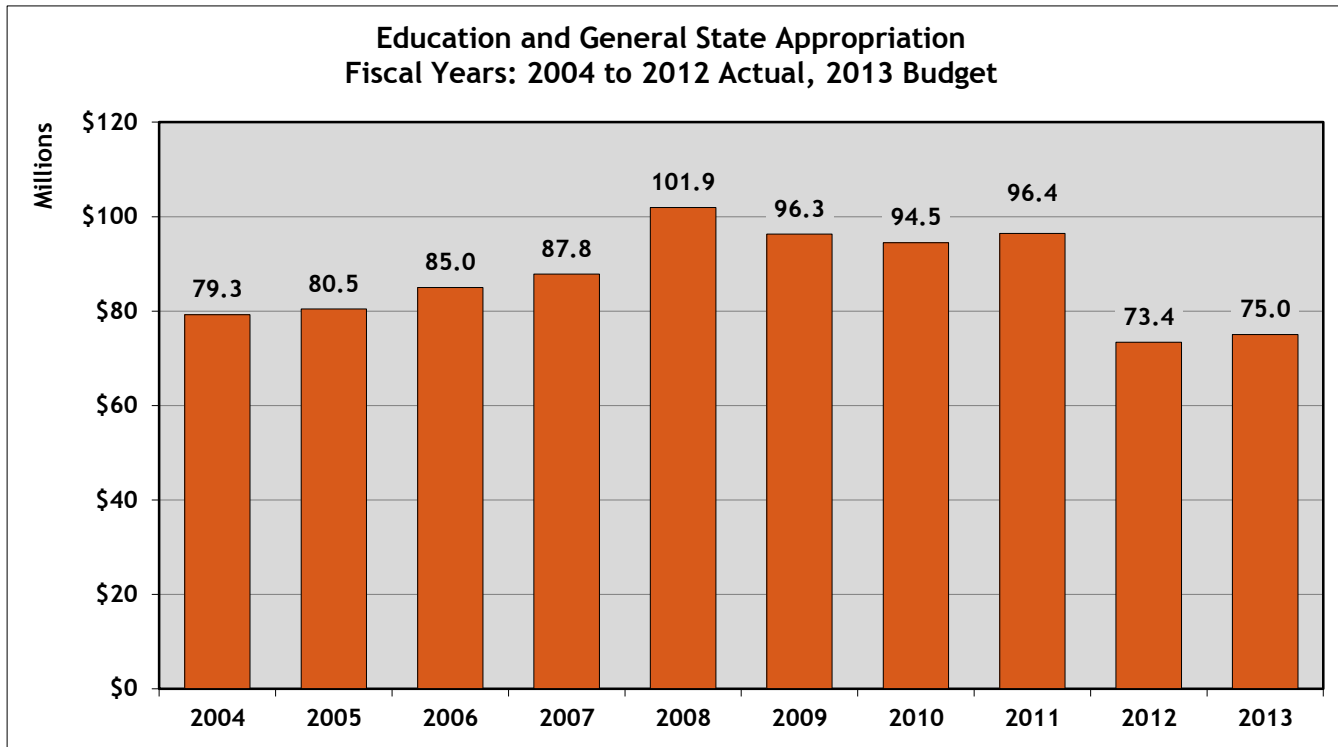
**Oregon State University**  
**Contribution Ratios for State Appropriation and Tuition & Other Revenue**  
**Fiscal Years: 2004-2012 Actual, 2013 Initial Budget**



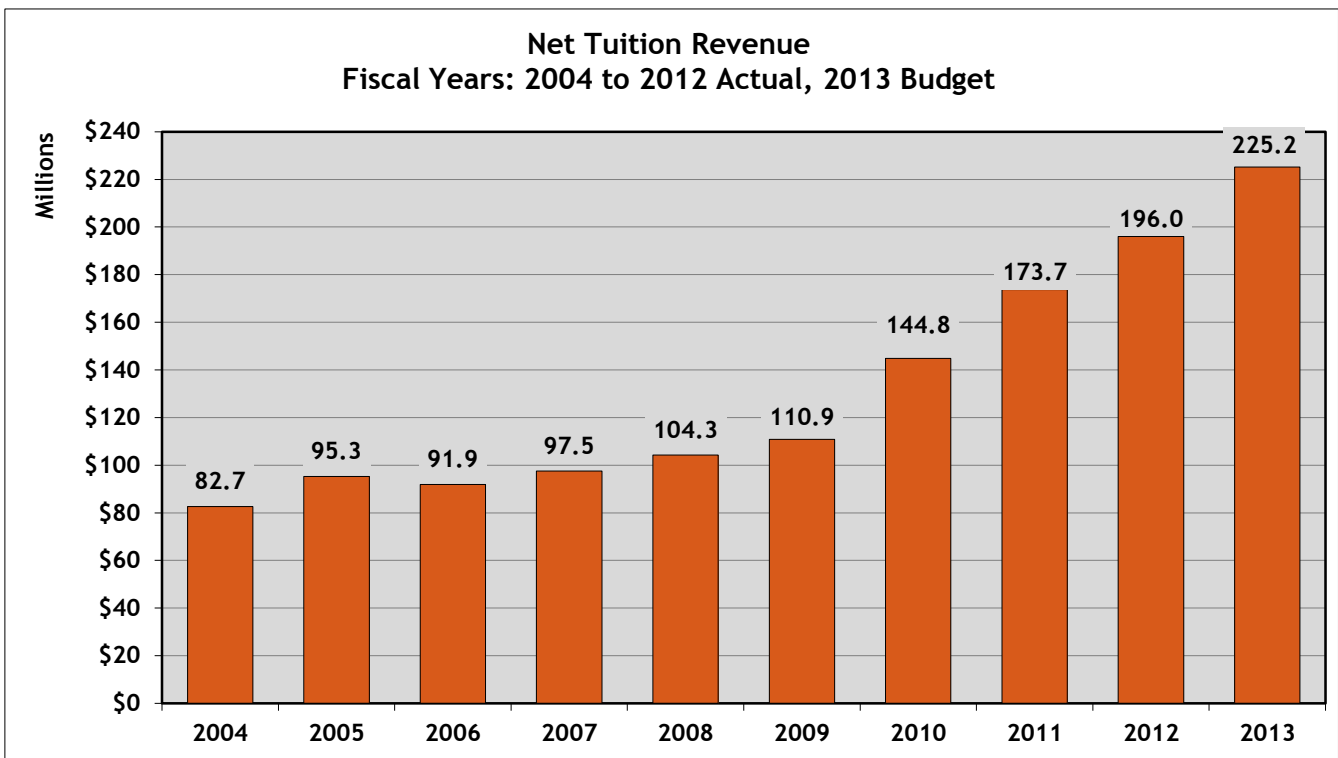
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
■ State Appropriation	37.4%	34.7%	35.9%	35.5%	37.6%	35.2%	31.3%	28.7%	21.2%	20.2%
■ Tuition & Other Revenue	62.6%	65.3%	64.1%	64.5%	62.4%	64.8%	68.7%	71.3%	78.8%	79.8%

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

## Oregon State University



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



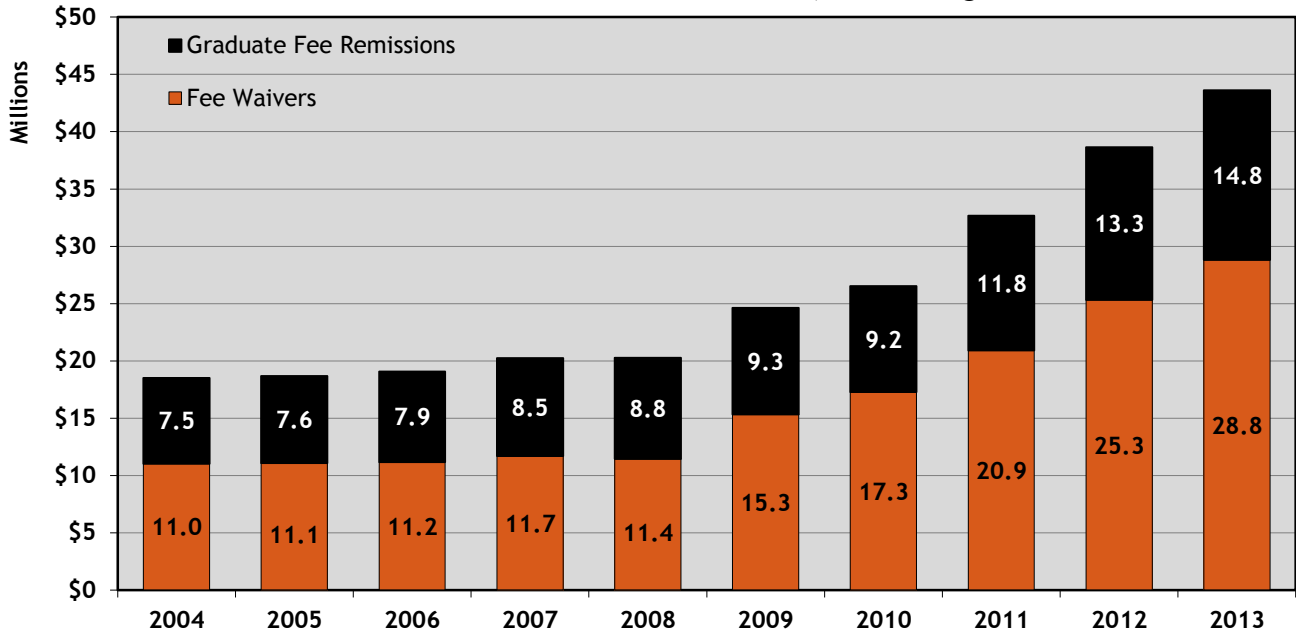
Source: OSU Data Warehouse, FY13 E&G Initial Budget. Excludes Statewide Public Service and OSU-Cascades.

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.

## Oregon State University

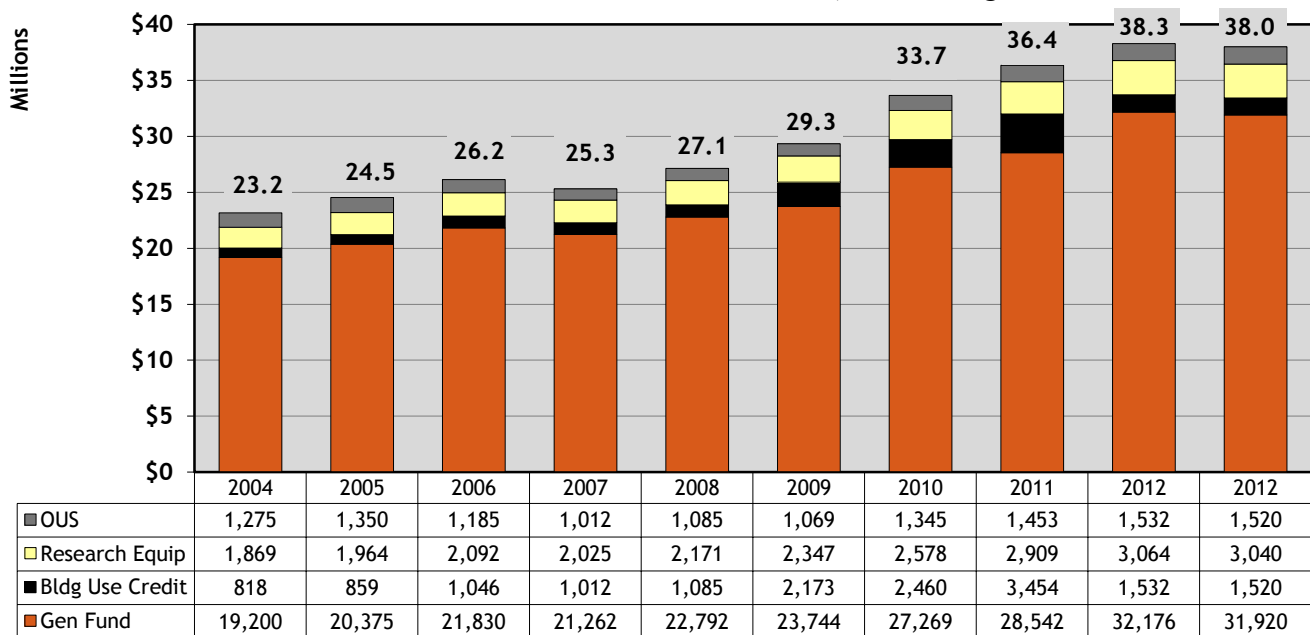
### Tuition Waivers/Graduate Fee Remissions Fiscal Years: 2004 to 2012 Actual, 2013 Budget



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.

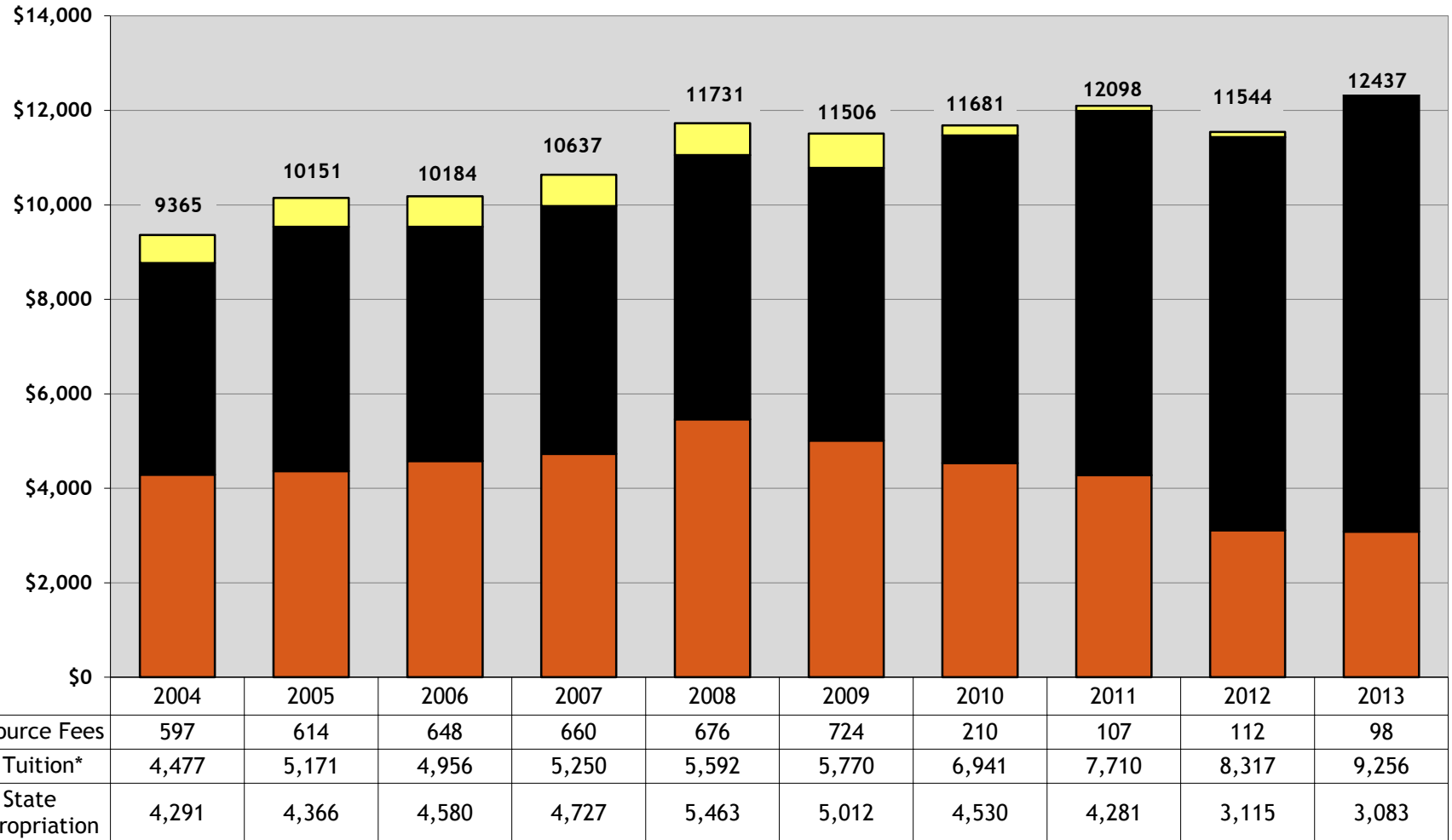
### Education and General Indirect Cost Recovery Fiscal Years: 2004 to 2012 Actual, 2013 Budget



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.

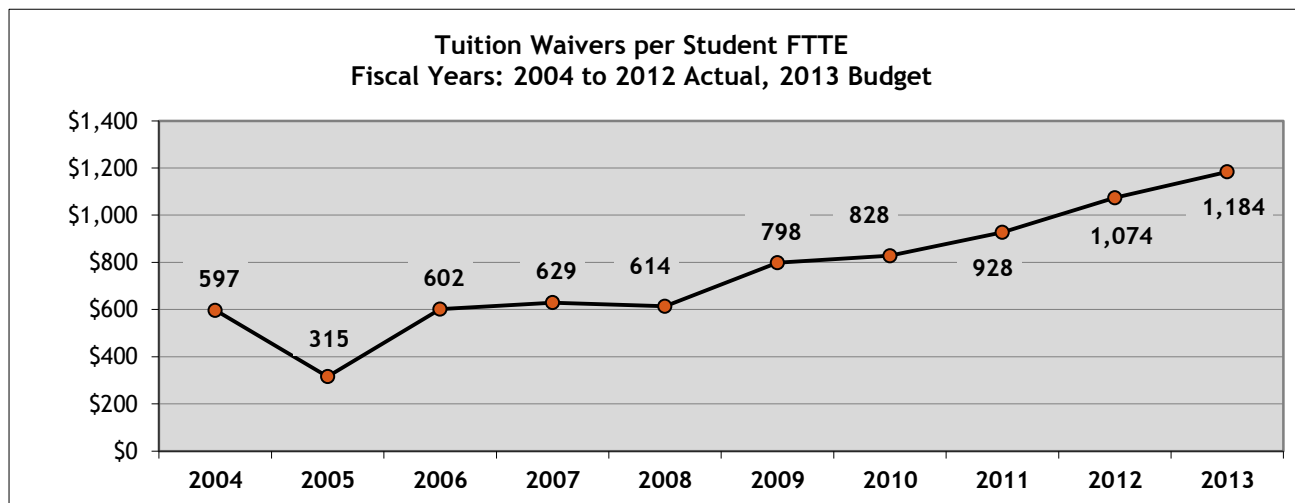
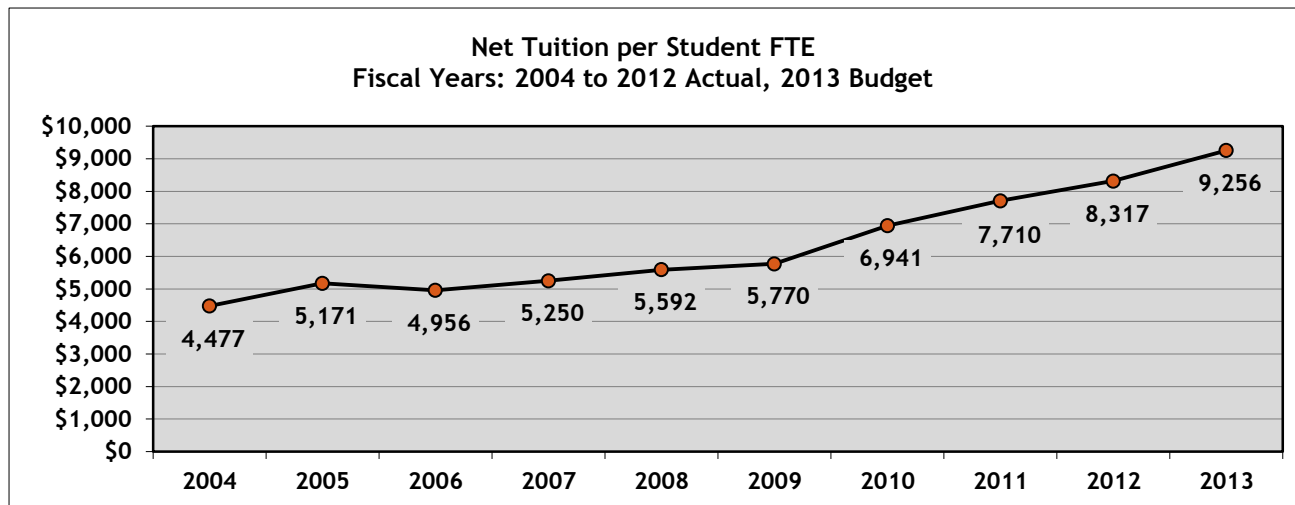
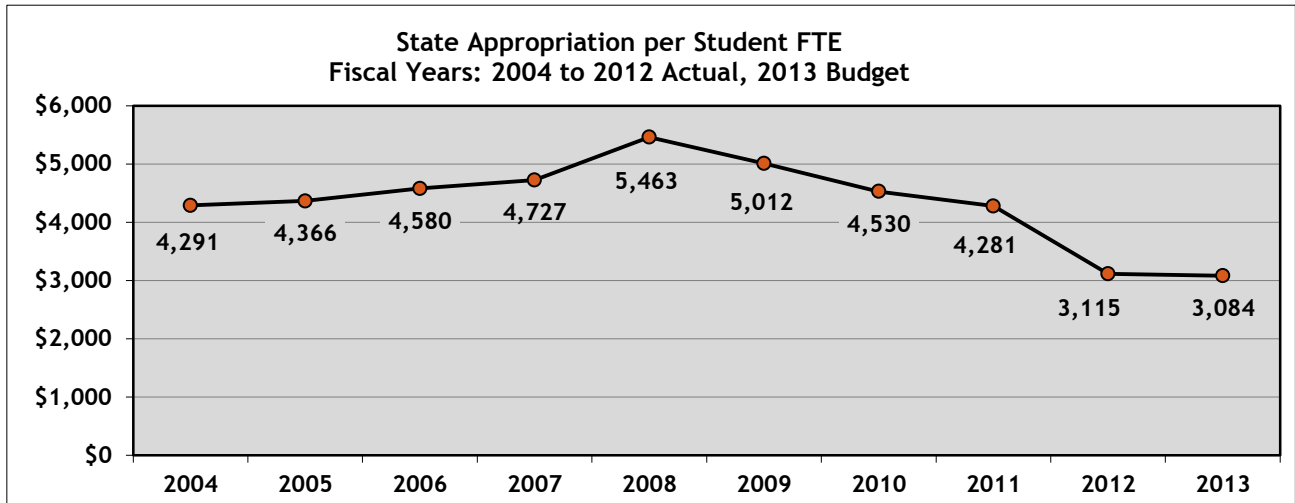
**Oregon State University**  
**Revenue Sources per Student FTE**  
**Education & General Fund (excluding ICR)**  
**Fiscal Years: 2004 to 2012 Actual, 2013 Initial Budget**



\*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.

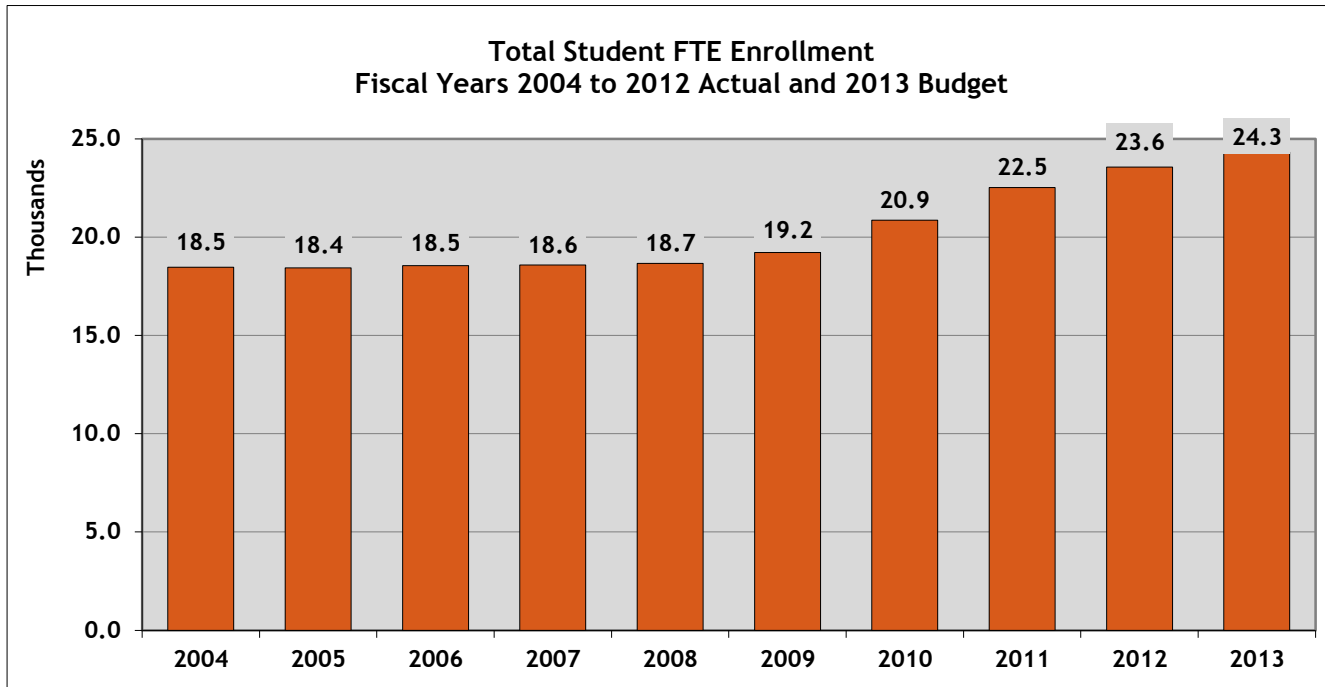
## Oregon State University



**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



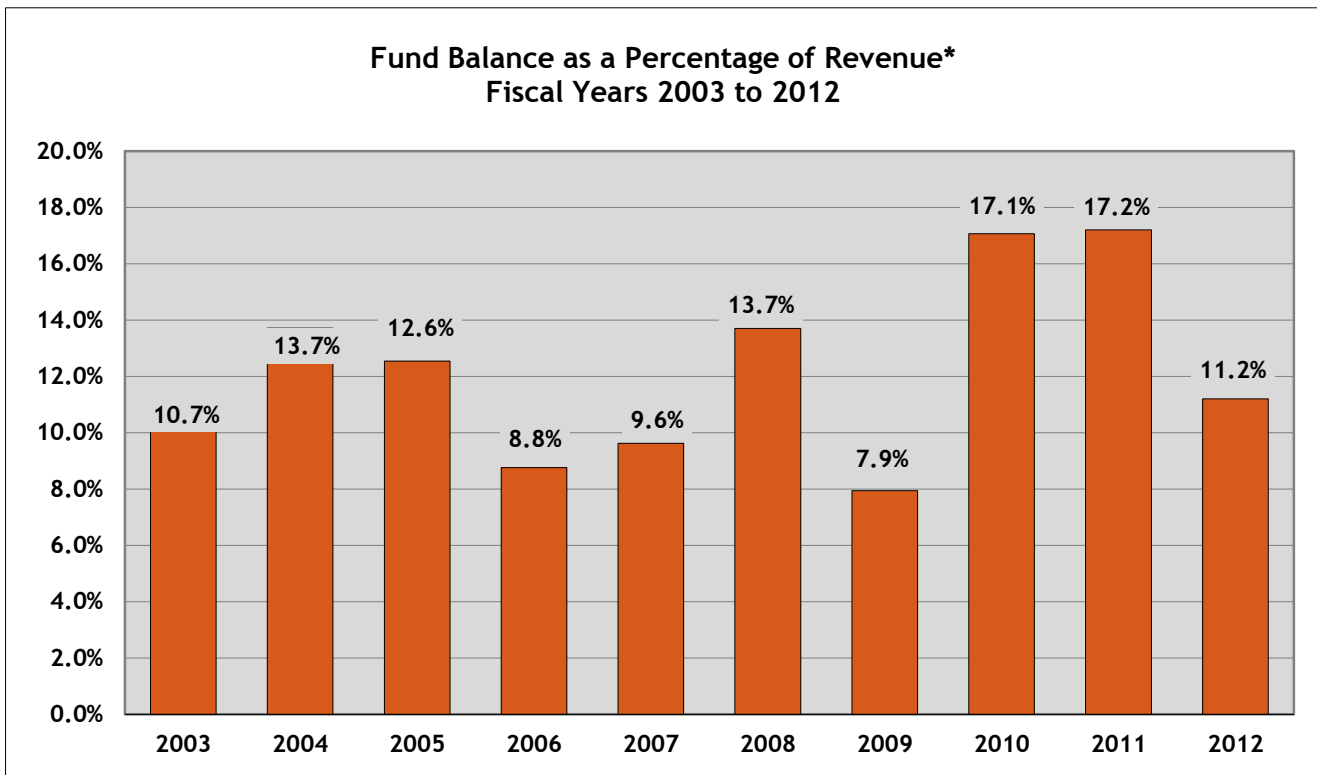
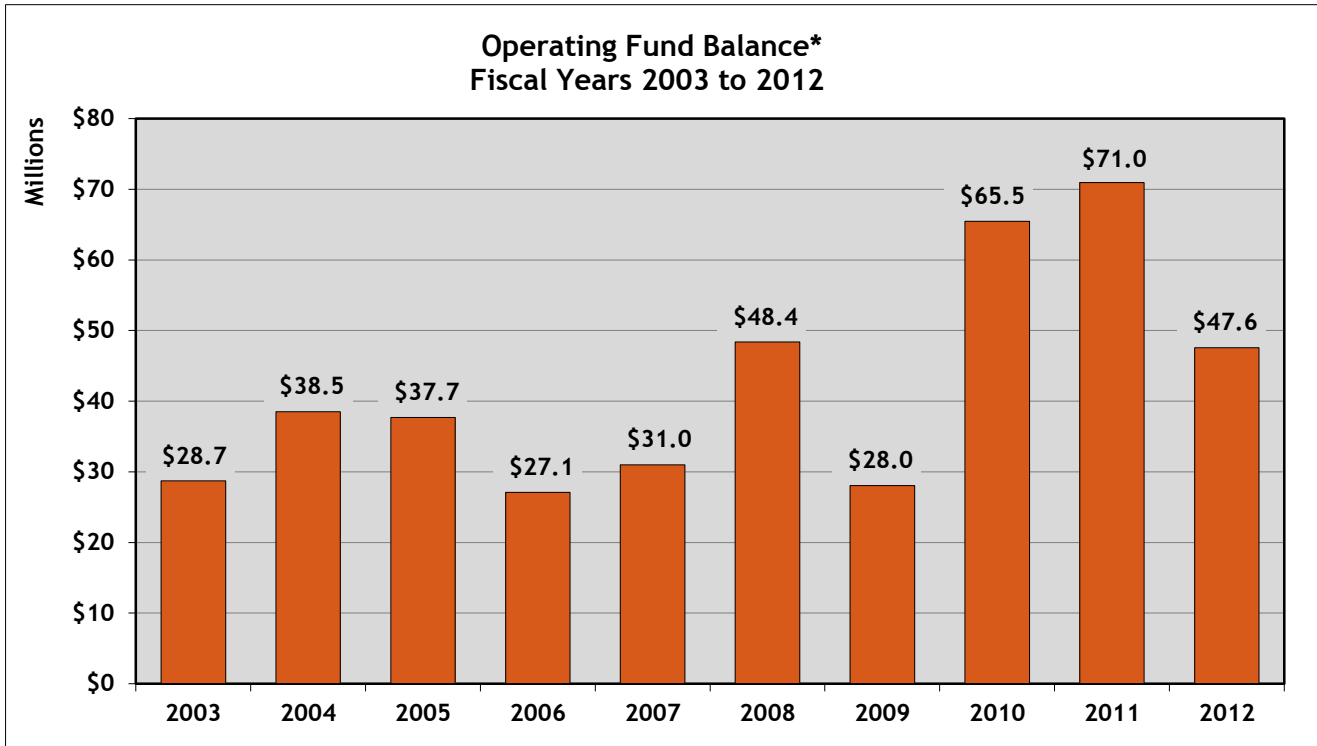
Source: Oregon University System Institutional Research

Oregon State University - Corvallis Campus	
Student FTE	
Fiscal Year 2013 Projection	
	<u>FTE</u>
Undergraduate - Fundable	14,152
Undergraduate - Non-fundable	5,232
Graduate - Fundable	3,070
Graduate - Non-fundable	953
First Professional - Fundable	708
First professional - Non-fundable	213
<b>Total</b>	<b><u><u>24,328</u></u></b>

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



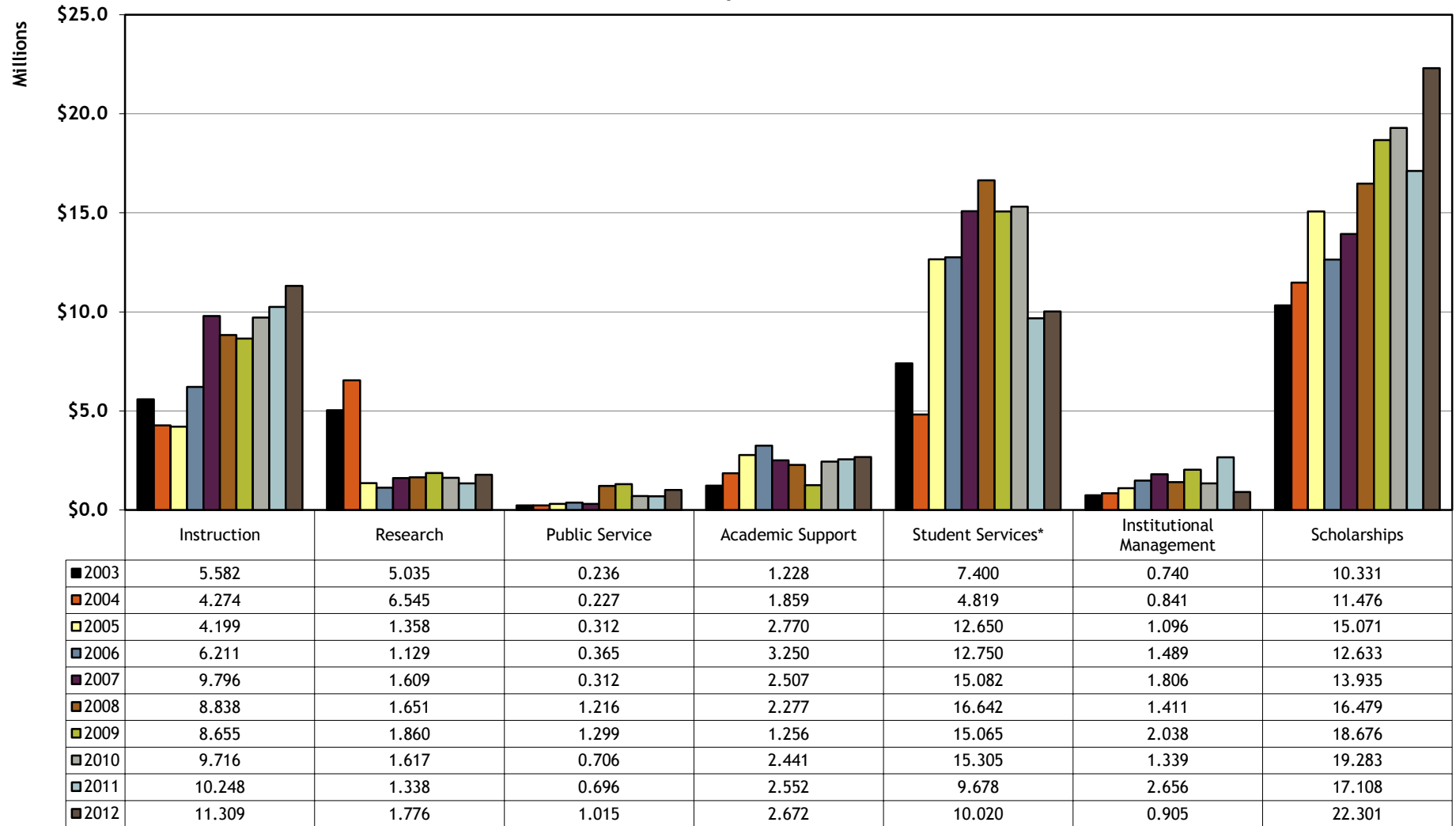
\* Education and General Funds, Statewide Public Service and OSU-Cascades

**Oregon State University**  
**Fund Balance by Unit**

	FY11	FY12	FY12	Carryover
<u>Education &amp; General Fund</u>	<u>Fund Balance</u>	<u>Fund Balance</u>	<u>Revenue</u>	<u>as a % of Revenue</u>
Executive Office	183,675	7,875	3,873,001	0.2%
University Relations & Marketing	-	(2,161) <sup>1</sup>	2,980,729	-0.1%
Provost	114,666	461,738	2,118,521	21.8%
Academic Affairs	1,191,421	1,052,253	5,175,274	20.3%
Information Services	2,011,296	(2,861,331)	14,656,233	-19.5%
Library	617,022	313,767	11,591,722	2.7%
Graduate School	2,136,463	2,745,087	3,726,210	73.7%
E-Campus (incl O&E & InterSess)	3,703,778	1,810,692	28,819,913	6.3%
Summer	524,946	1,051,630	7,546,112	13.9%
Extension (ROH)	33,317	34,037	13,864	245.5%
Research	3,971,139	4,282,509	14,066,916	30.4%
Student Affairs	2,422,440	2,668,751	13,613,587	19.6%
International Programs - OSU	680,172	963,035	2,301,651	41.8%
International Programs - OUS	525,249	401,474	2,956,424	13.6%
Honors	708,824	832,833	1,162,560	71.6%
Cascades	3,928,114	2,619,444	8,230,468	31.8%
Agricultural Sciences	3,035,331	4,499,753	17,087,649	26.3%
Veterinary Medicine	3,413,210	1,825,709	18,457,419	9.9%
Forestry	1,901,106	2,345,886	5,920,969	39.6%
Liberal Arts	3,194,722	4,551,655	34,672,152	13.1%
Science	6,343,882	7,374,446	39,902,823	18.5%
Oceanic & Atmospheric Sciences	1,678,714	921,133	7,801,978	11.8%
Business	1,735,049	2,292,604	11,786,508	19.5%
Engineering	3,436,728	3,441,877	34,176,468	10.1%
Education	1,143,723	889,728	3,585,579	24.8%
Public Health & Human Sciences	3,693,856	3,358,219	17,874,518	18.8%
Pharmacy	2,854,238	3,167,457	10,041,017	31.5%
University Business Centers	641,545	647,223	8,748,779	7.4%
Finance & Administration	183,585	(1,163,291)	10,268,463	-11.3%
Facilities	2,947,534	2,531,812	28,371,060	8.9%
Capital Projects (clearing)	5,840,231	4,250,901	-	N/A
Athletics	440,877	(73)	10,059,123	0.0%
Institutional Management	(1,511,118)	(16,221,500)	(26,770,784)	60.6%
Subtotal Education & General	<u>\$ 63,725,735</u>	<u>\$ 41,095,172</u>	<u>\$ 354,816,906</u>	<u>11.6%</u>
<u>Statewides</u>				
Agricultural Experiment Station	3,852,571	3,215,031 <sup>2</sup>	31,668,401	10.2%
Extension Service	1,787,436	853,982 <sup>2</sup>	29,807,234	2.9%
Forest Research Laboratory	1,595,087	2,390,820 <sup>2</sup>	7,100,696	33.7%
Subtotal Statewides	<u>7,235,094</u>	<u>6,459,833</u>	<u>68,576,331</u>	<u>9.4%</u>
Total	<u>70,960,829</u>	<u>47,555,005</u>	<u>423,393,237</u>	<u>11.2%</u>
<sup>1</sup> OSU Trademarks Royalty Fund	\$ 835,863	\$ 650,259	\$ 466,717	139.3%
<sup>2</sup> Statewide Federal Funds:	<u>FY11 Balance</u>	<u>FY12 Balance</u>	<u>Change</u>	
AES (Hatch & Multistate)	1,217,542	1,271,886	54,344	
Extension (Smith Lever)	5,877,255	5,736,607	(140,648)	
FRL (McIntyre Stennis)	674,396	530,501	(143,895)	



# Oregon State University Selected Gift Fund Expenditures 2003 - 2012



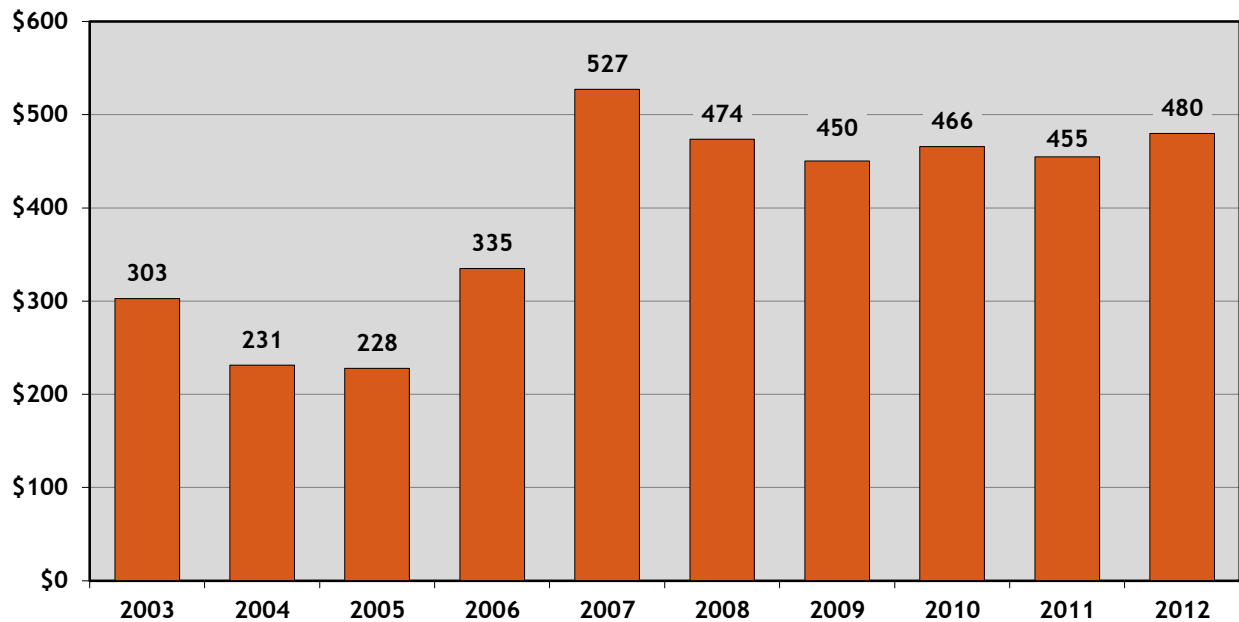
\*2005 through 2010 - Approximately \$5 million was transferred each year for debt service on Reser Stadium.

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

SOURCE: OSU Data Warehouse; excludes physical plant.

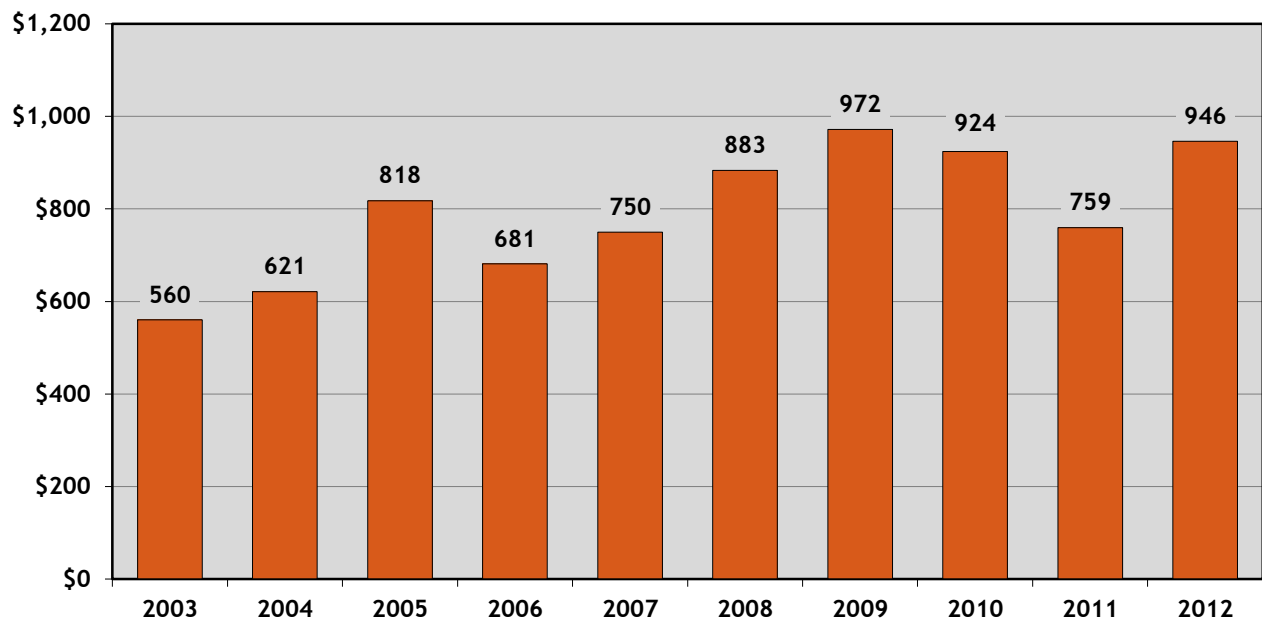
## Oregon State University

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



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

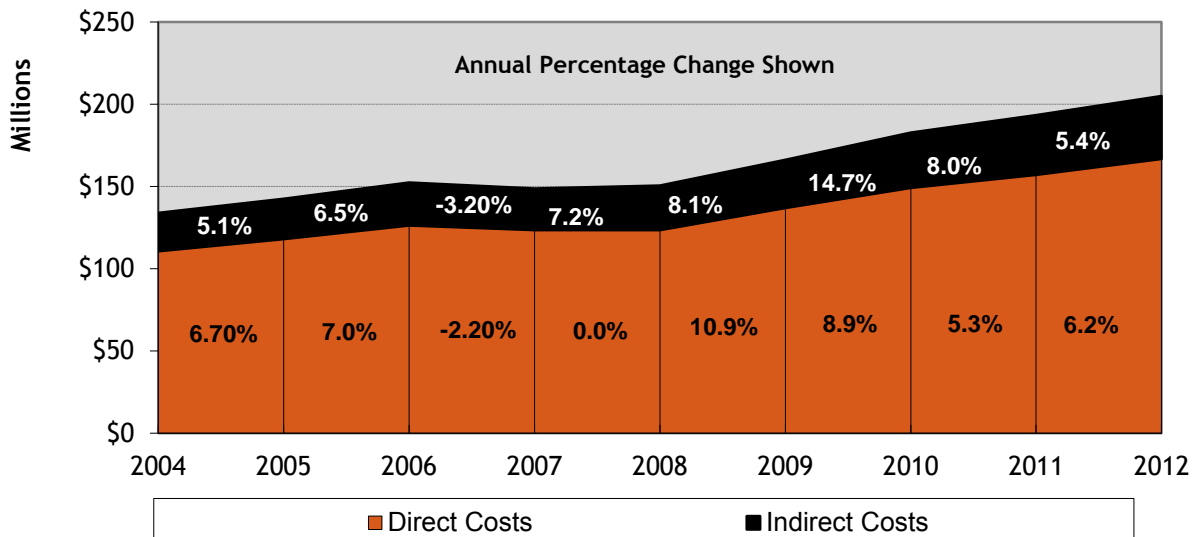
**Gift Expenditures per Student FTE - Scholarships**  
**Fiscal Years 2003 to 2012**



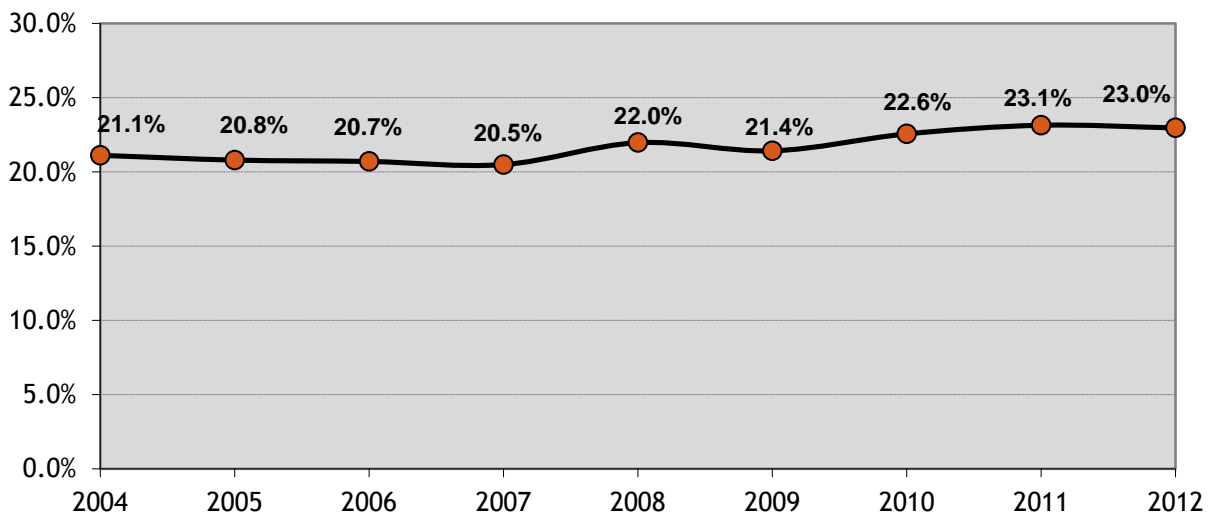
Source: OSU Data Warehouse. All scholarship expenditures in FS and M funds.

## Oregon State University

**Growth in Sponsored Program Revenues  
Fiscal Years 2004 to 2012**



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



Source: OSU Data Warehouse

### Research Awards Received (dollars in millions)

FY2005-06	FY2006-07	FY2007-08	FY2008-09	FY2009-10	FY2010-11	FY2011-12
\$151.4	\$145.0	\$164.2	\$188.9	\$213.1	\$208.0	\$207.0

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.

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

**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).

In-State Undergraduate	Total 2011-12	Total 2012-13	\$ Change FY12-FY13	% Change FY12-FY13
Tuition	6,228.00	6,660.00	432.00	6.9%
Fees	1,371.00	1,478.00	107.00	7.8%
Room & Board	9,638.00	9,671.00	33.00	0.3%
Total	17,237.00	17,809.00	572.00	3.3%
Out-of-State Undergraduate	Total 2011-12	Total 2012-13	\$ Change FY12-FY13	% Change FY12-FY13
Tuition	19,944.00	20,844.00	900.00	4.5%
Fees	1,371.00	1,478.00	107.00	7.8%
Room & Board	9,638.00	9,671.00	33.00	0.3%
Total	30,953.00	31,993.00	1,040.00	3.4%

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						
Resident Undergraduate				Non-resident Undergraduate		
	2011-2012	2012-2013	% Chg		2011-2012	2012-2013 % Chg
Cornell University	38,295	40,675	6.2%	Cornell University	54,435	56,815 4.4%
UC Davis	27,280	28,047	2.8%	UC Davis	50,158	50,925 1.5%
Pennsylvania State University	23,574	24,262	2.9%	Purdue University	36,896	38,001 3.0%
University of Illinois	20,572	21,648	5.2%	Pennsylvania State University	35,656	36,564 2.5%
Ohio State University	19,500	20,406	4.6%	Ohio State University	34,395	35,814 4.1%
Purdue University	18,728	19,199	2.5%	University of Illinois	34,714	35,790 3.1%
University of Arizona	18,582	18,671	0.5%	University of Arizona	34,041	34,867 2.4%
Michigan State University	17,968	18,574	3.4%	University of Wisconsin	33,145	34,658 4.6%
University of Wisconsin	17,395	18,408	5.8%	Michigan State University	33,124	34,540 4.3%
Colorado State University	16,788	17,992	7.2%	Colorado State University	32,488	33,715 3.8%
<b>Oregon State University</b>	<b>17,237</b>	<b>17,809</b>	<b>3.3%</b>	Texas A&M University	31,707	33,208 4.7%
Texas A&M University	16,317	16,678	2.2%	<b>Oregon State University</b>	<b>30,953</b>	<b>31,993 3.4%</b>
Iowa State University	15,107	15,447	2.3%	N. Carolina State University	26,963	28,412 5.4%
N. Carolina State University	14,128	15,248	7.9%	Iowa State University	26,979	27,559 2.1%

Tuition and Fees - Based on 12 credit hours						
Resident Undergraduate				Non-resident Undergraduate		
	2010-2011	2011-2012	% Chg		2011-2012	2012-2013 % Chg
Cornell University	25,185	27,045	7.4%	Cornell University	41,325	43,185 4.5%
Pennsylvania State University	15,124	15,562	2.9%	UC Davis	38,001	38,135 0.4%
UC Davis	15,123	15,257	0.9%	Purdue University	27,676	28,702 3.7%
University of Illinois	11,104	11,636	4.8%	Pennsylvania State University	27,206	27,864 2.4%
University of Wisconsin	9,671	10,384	7.4%	University of Wisconsin	25,421	26,634 4.8%
Michigan State University	9,814	10,098	2.9%	University of Arizona	25,494	26,231 2.9%
Ohio State University	9,735	10,036	3.1%	Michigan State University	24,970	26,064 4.4%
University of Arizona	10,035	10,035	0.0%	University of Illinois	25,246	25,778 2.1%
Purdue University	9,478	9,900	4.5%	Ohio State University	24,630	25,444 3.3%
Colorado State University	7,952	8,558	7.6%	Texas A&M University	23,809	25,036 5.2%
Texas A&M University	8,419	8,506	1.0%	Colorado State University	23,652	24,351 3.0%
<b>Oregon State University</b>	<b>7,599</b>	<b>8,138</b>	<b>7.1%</b>	<b>Oregon State University</b>	<b>21,315</b>	<b>22,322 4.7%</b>
N. Carolina State University	7,018	7,788	11.0%	N. Carolina State University	19,853	20,952 5.5%
Iowa State University	7,486	7,726	3.2%	Iowa State University	19,358	19,838 2.5%

Room & Board Rates - Double Occupancy			
	2010-2011	2012-2013	% Chg
Cornell University	13,110	13,630	4.0%
UC Davis	12,157	12,790	5.2%
University of Illinois	9,468	10,012	5.7%
<b>Oregon State University</b>	<b>9,638</b>	<b>9,671</b>	<b>0.3%</b>
Ohio State University	9,765	10,370	6.2%
Colorado State University	8,836	9,364	6.0%
Purdue University	9,250	9,299	0.5%
Pennsylvania State University	8,450	8,700	3.0%
University of Arizona	8,547	8,636	1.0%
Michigan State University	8,154	8,476	3.9%
Texas A&M University	7,898	8,172	3.5%
University of Wisconsin	7,724	8,024	3.9%
Iowa State University	7,621	7,721	1.3%
N. Carolina State University	7,110	7,460	4.9%



OSU - Valley Library

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**

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

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**

Credits	Resident		Non-Resident	
	Undergraduate	Graduate	Undergraduate	Graduate
1	185.00	421.00	579.00	677.00
2	370.00	842.00	1,158.00	1,354.00
3	555.00	1,263.00	1,737.00	2,031.00
4	740.00	1,684.00	2,316.00	2,708.00
5	925.00	2,105.00	2,895.00	3,385.00
6	1,110.00	2,526.00	3,474.00	4,062.00
7	1,295.00	2,947.00	4,053.00	4,739.00
8	1,480.00	3,368.00	4,632.00	5,416.00
9	1,665.00	3,789.00	5,211.00	6,093.00
10	1,850.00	3,789.00	5,790.00	6,093.00
11	2,035.00	3,789.00	6,369.00	6,093.00
12	2,220.00	3,789.00	6,948.00	6,093.00
13	2,220.00	3,789.00	6,948.00	6,093.00
14	2,220.00	3,789.00	6,948.00	6,093.00
15	2,220.00	3,789.00	6,948.00	6,093.00
16	2,220.00	3,789.00	6,948.00	6,093.00
17	2,405.00	4,210.00	7,527.00	6,770.00
18	2,590.00	4,631.00	8,106.00	7,447.00
<i>Each Add'l Credit Hour</i>	185.00	421.00	579.00	677.00

**Endnotes:**

- (1) A one time Matriculation Fee of \$300 is assessed to all new and transferred undergraduate
- (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

Credits	Building		Incidental		Health Service		Total Fees	
	Undergraduate	Graduate	Undergraduate	Graduate	Undergraduate	Graduate	Undergraduate	Graduate
1	23.00	23.00	268.25	275.25	124.32	124.32	415.57	422.57
2	25.00	26.00	273.25	281.25	124.32	124.32	422.57	431.57
3	27.00	29.00	278.25	287.25	124.32	124.32	429.57	440.57
4	29.00	32.00	283.25	293.25	124.32	124.32	436.57	449.57
5	31.00	35.00	288.25	299.25	124.32	124.32	443.57	458.57
6	33.00	38.00	293.25	305.25	124.32	124.32	450.57	467.57
7	35.00	41.00	298.25	311.25	124.32	124.32	457.57	476.57
8	37.00	43.00	303.25	317.25	124.32	124.32	464.57	484.57
9	39.00	45.00	308.25	323.25	124.32	124.32	471.57	492.57
10	41.00	45.00	313.25	323.25	124.32	124.32	478.57	492.57
11	43.00	45.00	318.25	323.25	124.32	124.32	485.57	492.57
12	45.00	45.00	323.25	323.25	124.32	124.32	492.57	492.57
13	45.00	45.00	323.25	323.25	124.32	124.32	492.57	492.57
14	45.00	45.00	323.25	323.25	124.32	124.32	492.57	492.57
15	45.00	45.00	323.25	323.25	124.32	124.32	492.57	492.57
16	45.00	45.00	323.25	323.25	124.32	124.32	492.57	492.57
17	45.00	45.00	323.25	323.25	124.32	124.32	492.57	492.57
18	45.00	45.00	323.25	323.25	124.32	124.32	492.57	492.57
Each Add'l Credit Hour	45.00	45.00	323.25	323.25	124.32	124.32	492.57	492.57

**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

Credits	Business		Pre-Engineering		Prof-Engineering	
	Resident	Non-Resident	Resident	Non-Resident	Resident	Non-Resident
1	202.00	596.00	219.00	613.00	236.00	630.00
2	404.00	1,192.00	438.00	1,226.00	472.00	1,260.00
3	606.00	1,788.00	657.00	1,839.00	708.00	1,890.00
4	808.00	2,384.00	876.00	2,452.00	944.00	2,520.00
5	1,010.00	2,980.00	1,095.00	3,065.00	1,180.00	3,150.00
6	1,212.00	3,576.00	1,314.00	3,678.00	1,416.00	3,780.00
7	1,414.00	4,172.00	1,533.00	4,291.00	1,652.00	4,410.00
8	1,616.00	4,768.00	1,752.00	4,904.00	1,888.00	5,040.00
9	1,818.00	5,364.00	1,971.00	5,517.00	2,124.00	5,670.00
10	2,020.00	5,960.00	2,190.00	6,130.00	2,360.00	6,300.00
11	2,222.00	6,556.00	2,409.00	6,743.00	2,596.00	6,930.00
12	2,424.00	7,152.00	2,628.00	7,356.00	2,832.00	7,560.00
13	2,441.00	7,169.00	2,662.00	7,390.00	2,883.00	7,611.00
14	2,458.00	7,186.00	2,696.00	7,424.00	2,934.00	7,662.00
15	2,475.00	7,203.00	2,730.00	7,458.00	2,985.00	7,713.00
16	2,492.00	7,220.00	2,764.00	7,492.00	3,036.00	7,764.00
17	2,694.00	7,816.00	2,983.00	8,105.00	3,272.00	8,394.00
18	2,896.00	8,412.00	3,202.00	8,718.00	3,508.00	9,024.00
Each Add'l Credit Hour	202.00	596.00	219.00	613.00	236.00	630.00

### 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

Credits	Forestry <sup>1</sup>		Apparel & Interior Design <sup>2</sup>		Honors College <sup>3</sup>	
	Resident	Non-Resident	Resident	Non-Resident	Resident	Non-Resident
1	195.00	589.00	195.00	589.00	495.00	889.00
2	390.00	1,178.00	390.00	1,178.00	680.00	1,468.00
3	585.00	1,767.00	585.00	1,767.00	865.00	2,047.00
4	780.00	2,356.00	780.00	2,356.00	1,050.00	2,626.00
5	975.00	2,945.00	975.00	2,945.00	1,235.00	3,205.00
6	1,170.00	3,534.00	1,170.00	3,534.00	1,420.00	3,784.00
7	1,365.00	4,123.00	1,365.00	4,123.00	1,605.00	4,363.00
8	1,560.00	4,712.00	1,560.00	4,712.00	1,790.00	4,942.00
9	1,755.00	5,301.00	1,755.00	5,301.00	1,975.00	5,521.00
10	1,950.00	5,890.00	1,950.00	5,890.00	2,160.00	6,100.00
11	2,145.00	6,479.00	2,145.00	6,479.00	2,345.00	6,679.00
12	2,340.00	7,068.00	2,340.00	7,068.00	2,530.00	7,258.00
13	2,350.00	7,078.00	2,350.00	7,078.00	2,530.00	7,258.00
14	2,360.00	7,088.00	2,360.00	7,088.00	2,530.00	7,258.00
15	2,370.00	7,098.00	2,370.00	7,098.00	2,530.00	7,258.00
16	2,380.00	7,108.00	2,380.00	7,108.00	2,530.00	7,258.00
17	2,575.00	7,697.00	2,575.00	7,697.00	2,715.00	7,837.00
18	2,770.00	8,286.00	2,770.00	8,286.00	2,900.00	8,416.00
Each Add'l Credit Hour	195.00	589.00	195.00	589.00	185.00	579.00

### 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.

(2) Includes the Following Majors: Pre-Apparel Design, Apparel Design, Pre-Interior Design, Interior Design, Merchandising.

(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

Credits	Business - MBA		Engineering		Professional Science <sup>2</sup>	
	Resident	Non-Resident	Resident	Non-Resident	Resident	Non-Resident
1	670.00	1,068.00	476.00	732.00	449.00	705.00
2	1,340.00	2,136.00	952.00	1,464.00	898.00	1,410.00
3	2,010.00	3,204.00	1,428.00	2,196.00	1,347.00	2,115.00
4	2,680.00	4,272.00	1,904.00	2,928.00	1,796.00	2,820.00
5	3,350.00	5,340.00	2,380.00	3,660.00	2,245.00	3,525.00
6	4,020.00	6,408.00	2,856.00	4,392.00	2,694.00	4,230.00
7	4,690.00	7,476.00	3,332.00	5,124.00	3,143.00	4,935.00
8	5,360.00	8,544.00	3,808.00	5,856.00	3,592.00	5,640.00
9	6,030.00	9,612.00	4,284.00	6,588.00	4,041.00	6,345.00
10	6,060.00	9,642.00	4,339.00	6,643.00	4,041.00	6,345.00
11	6,090.00	9,672.00	4,394.00	6,698.00	4,041.00	6,345.00
12	6,120.00	9,702.00	4,449.00	6,753.00	4,041.00	6,345.00
13	6,150.00	9,732.00	4,504.00	6,808.00	4,041.00	6,345.00
14	6,180.00	9,762.00	4,559.00	6,863.00	4,041.00	6,345.00
15	6,210.00	9,792.00	4,614.00	6,918.00	4,041.00	6,345.00
16	6,240.00	9,822.00	4,669.00	6,973.00	4,041.00	6,345.00
17	6,910.00	10,890.00	5,145.00	7,705.00	4,462.00	7,022.00
18	7,580.00	11,958.00	5,621.00	8,437.00	4,883.00	7,699.00
Each Add'l Credit Hour	670.00	1,068.00	476.00	732.00	421.00	677.00

### 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

Credits	Pharm D				Master of Public Health	
	<u>Graduate 2008-2010 Cohort</u>		<u>Graduate 2011 Cohort &amp; Later</u>			
	<i>Resident</i>	<i>Non-Resident</i>	<i>Resident</i>	<i>Non-Resident</i>	<i>Resident</i>	<i>Non-Resident</i>
1	544.00	805.00	544.00	936.00	484.00	778.00
2	1,088.00	1,610.00	1,088.00	1,872.00	968.00	1,556.00
3	1,632.00	2,415.00	1,632.00	2,808.00	1,452.00	2,334.00
4	2,176.00	3,220.00	2,176.00	3,744.00	1,936.00	3,112.00
5	2,720.00	4,025.00	2,720.00	4,680.00	2,420.00	3,890.00
6	3,264.00	4,830.00	3,264.00	5,616.00	2,904.00	4,668.00
7	3,808.00	5,635.00	3,808.00	6,552.00	3,388.00	5,446.00
8	4,352.00	6,440.00	4,352.00	7,488.00	3,872.00	6,224.00
9	4,896.00	7,245.00	4,896.00	8,424.00	4,356.00	7,002.00
10	5,440.00	8,050.00	5,440.00	9,360.00	4,356.00	7,002.00
11	5,984.00	8,855.00	5,984.00	10,296.00	4,356.00	7,002.00
12	6,528.00	9,660.00	6,528.00	11,232.00	4,356.00	7,002.00
13	6,528.00	9,660.00	6,528.00	11,232.00	4,356.00	7,002.00
14	6,528.00	9,660.00	6,528.00	11,232.00	4,356.00	7,002.00
15	6,528.00	9,660.00	6,528.00	11,232.00	4,356.00	7,002.00
16	6,528.00	9,660.00	6,528.00	11,232.00	4,356.00	7,002.00
17	6,528.00	9,660.00	6,528.00	11,232.00	4,840.00	7,780.00
18	6,528.00	9,660.00	6,528.00	11,232.00	5,324.00	8,558.00
<i>Each Add'l Credit Hour</i>	<i>0.00</i>	<i>0.00</i>	<i>0.00</i>	<i>0.00</i>	<i>484.00</i>	<i>778.00</i>

### 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

Credits	OSU/OSHU Oregon Medical Physics		Veterinary Medicine <sup>1, 3, 3a, 4, 4a</sup>			
	Resident	Non-Resident	<u>Graduate 1-3rd Year</u>		<u>Graduate 4th Year</u>	
			Resident	Non-Resident	Resident	Non-Resident
1	672.00	747.00	n/a	n/a	n/a	n/a
2	1,344.00	1,494.00	n/a	n/a	n/a	n/a
3	2,016.00	2,241.00	n/a	n/a	n/a	n/a
4	2,688.00	2,988.00	n/a	n/a	n/a	n/a
5	3,360.00	3,735.00	n/a	n/a	n/a	n/a
6	4,032.00	4,482.00	n/a	n/a	n/a	n/a
7	4,704.00	5,229.00	n/a	n/a	n/a	n/a
8	5,376.00	5,976.00	n/a	n/a	n/a	n/a
9	6,048.00	6,723.00	n/a	n/a	n/a	n/a
10	6,720.00	7,470.00	n/a	n/a	n/a	n/a
11	7,392.00	8,217.00	n/a	n/a	n/a	n/a
12	8,064.00	8,964.00	6,431.00	12,865.00	4,854.00	9,680.00
13	8,736.00	9,711.00	6,431.00	12,865.00	4,854.00	9,680.00
14	9,408.00	10,458.00	6,431.00	12,865.00	4,854.00	9,680.00
15	10,080.00	11,205.00	6,431.00	12,865.00	4,854.00	9,680.00
16	10,752.00	11,952.00	6,431.00	12,865.00	4,854.00	9,680.00
17	11,424.00	12,699.00	6,431.00	12,865.00	4,854.00	9,680.00
18	12,096.00	13,446.00	6,431.00	12,865.00	4,854.00	9,680.00
Each Add'l Credit Hour	672.00	747.00	-	-	-	-

### 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

Credits	Resident		Non-Resident	
	Undergraduate	Graduate	Undergraduate	Graduate
1	175.00	421.00	579.00	677.00
2	350.00	842.00	1,158.00	1,354.00
3	525.00	1,263.00	1,737.00	2,031.00
4	700.00	1,684.00	2,316.00	2,708.00
5	875.00	2,105.00	2,895.00	3,385.00
6	1,050.00	2,526.00	3,474.00	4,062.00
7	1,225.00	2,947.00	4,053.00	4,739.00
8	1,400.00	3,368.00	4,632.00	5,416.00
9	1,575.00	3,789.00	5,211.00	6,093.00
10	1,750.00	3,789.00	5,790.00	6,093.00
11	1,925.00	3,789.00	6,369.00	6,093.00
12	2,100.00	3,789.00	6,948.00	6,093.00
13	2,100.00	3,789.00	6,948.00	6,093.00
14	2,100.00	3,789.00	6,948.00	6,093.00
15	2,100.00	3,789.00	6,948.00	6,093.00
16	2,100.00	3,789.00	6,948.00	6,093.00
17	2,275.00	4,210.00	7,527.00	6,770.00
18	2,450.00	4,631.00	8,106.00	7,447.00
Each Add'l Credit Hour	175.00	421.00	579.00	677.00

**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

Credits	Building		Incidental		Total Fees	
	Undergraduate	Graduate	Undergraduate	Graduate	Undergraduate	Graduate
1	23.00	23.00	93.00	100.00	116.00	123.00
2	25.00	26.00	97.00	105.00	122.00	131.00
3	27.00	29.00	101.00	110.00	128.00	139.00
4	29.00	32.00	105.00	115.00	134.00	147.00
5	31.00	35.00	109.00	120.00	140.00	155.00
6	33.00	38.00	113.00	125.00	146.00	163.00
7	35.00	41.00	117.00	130.00	152.00	171.00
8	37.00	43.00	121.00	135.00	158.00	178.00
9	39.00	45.00	125.00	140.00	164.00	185.00
10	41.00	45.00	130.00	140.00	171.00	185.00
11	43.00	45.00	135.00	140.00	178.00	185.00
12	45.00	45.00	140.00	140.00	185.00	185.00
13	45.00	45.00	140.00	140.00	185.00	185.00
14	45.00	45.00	140.00	140.00	185.00	185.00
15	45.00	45.00	140.00	140.00	185.00	185.00
16	45.00	45.00	140.00	140.00	185.00	185.00
17	45.00	45.00	140.00	140.00	185.00	185.00
18	45.00	45.00	140.00	140.00	185.00	185.00
Each Add'l Credit Hour	45.00	45.00	140.00	140.00	185.00	185.00

**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

Credits	Business		Engineering	
	<u>Undergraduate</u>		<u>Undergraduate</u>	
	Resident	Non-Resident	Resident	Non-Resident
1	192.00	596.00	226.00	630.00
2	384.00	1,192.00	452.00	1,260.00
3	576.00	1,788.00	678.00	1,890.00
4	768.00	2,384.00	904.00	2,520.00
5	960.00	2,980.00	1,130.00	3,150.00
6	1,152.00	3,576.00	1,356.00	3,780.00
7	1,344.00	4,172.00	1,582.00	4,410.00
8	1,536.00	4,768.00	1,808.00	5,040.00
9	1,728.00	5,364.00	2,034.00	5,670.00
10	1,920.00	5,960.00	2,260.00	6,300.00
11	2,112.00	6,556.00	2,486.00	6,930.00
12	2,304.00	7,152.00	2,712.00	7,560.00
13	2,321.00	7,169.00	2,763.00	7,611.00
14	2,338.00	7,186.00	2,814.00	7,662.00
15	2,355.00	7,203.00	2,865.00	7,713.00
16	2,372.00	7,220.00	2,916.00	7,764.00
17	2,564.00	7,816.00	3,142.00	8,394.00
18	2,756.00	8,412.00	3,368.00	9,024.00
Each Add'l Credit Hour	192.00	596.00	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.

**Oregon State University**  
**Authorized Capital Projects**  
as of October 1, 2012

<u>Project Title</u>	<u>Biennium</u>	<u>General Funds</u>	<u>XI-G Bonds</u>	<u>XI-F Bonds</u>	<u>Other</u>	<u>Lottery Bonds</u>	<u>Loans &amp; COP's</u>	<u>XI-Q Bonds</u>	<u>TOTAL</u>
Apperson Hall	07-09	\$ -	\$ -	\$ -	\$ 4,000,000	\$ -	\$ -	\$ -	\$ 4,000,000
Pauling Research & Education Bldg. (LPI & class laboratory)	07-09	-	31,256,035	-	31,256,035	-	-	-	62,512,070
Mouse Model Organism Facility	07-09	-	-	-	1,500,000	-	-	-	1,500,000
Nash Hall DM/Seismic Tier II	07-09	3,776,000	3,776,000	-	1,198,000	-	6,824,000	-	15,574,000
National Wave Energy Research Center	07-09	1,500,000	1,500,000	-	3,000,000	-	-	-	6,000,000
Building Rewiring	07-09	-	-	-	-	-	5,000,000	-	5,000,000
Goss Stadium Expansion	07-09	-	-	-	4,500,000	-	-	-	4,500,000
UHDS Arnold Hall Renovation	07-09	-	-	3,500,000	-	-	-	-	3,500,000
Cross Country Track	07-09	-	-	3,000,000	-	-	-	-	3,000,000
University/Athletics Academic Center	07-09	-	-	1	-	-	-	-	1
Boathouse Remodel	07-09	-	-	3,000,000	-	-	-	-	3,000,000
Gill Coliseum Renovation	07-09	-	-	20,000,000	-	-	-	-	20,000,000
Education Hall Structural Deficiencies DM	09-11	-	-	-	-	4,000,000	-	-	4,000,000
Strand Ag Hall Deferred Maintenance	09-11	-	6,586,000	-	-	6,586,000	6,851,000	4,847,000	24,870,000
Bates Hall/Hallie Ford Healthy Children & Families Center	09-11	-	5,000,000	-	5,000,000	-	-	-	10,000,000
Student Success Center	09-11	-	2,054,000	-	7,392,000	4,554,000	-	-	14,000,000
Cultural Center	09-11	-	-	10,000,000	-	-	-	-	10,000,000
International Residence Hall	09-11	-	-	52,000,000	-	-	-	-	52,000,000
Sports Performance Center	09-11	-	-	12,000,000	-	-	-	-	12,000,000
CH2M Hill Alumni Center	09-11	-	-	-	4,200,000	-	-	-	4,200,000
Intramural Outdoor Sports Complex	09-11	-	-	7,450,000	300,000	-	-	-	7,750,000
McAlexander Field House	09-11	-	-	3,250,000	500,000	-	-	-	3,750,000
Sonpark/EPA Acquisition	09-11	-	-	-	-	-	1,900,000	-	1,900,000
Warehouse Acquisition	09-11	-	-	-	-	-	1,000,000	-	1,000,000
Marine Mammal and Genomics Building	09-11	-	-	-	-	-	-	-	-
Biofuels Demonstration Project	09-11	-	4,000,000	-	4,000,000	-	-	-	8,000,000
New Business Education Building	11-13	-	-	-	31,900,000	24,100,000	-	-	56,000,000
Cascades Graduate Studies Building	11-13	-	-	-	3,000,000	2,000,000	-	-	5,000,000
Animal Sciences Teaching Pavilion Equipment	11-13	-	-	-	2,000,000	-	-	-	2,000,000
Education Hall Deferred Maintenance	11-13	-	-	-	6,000,000	-	-	-	6,000,000
OSU Bookstore Relocation	11-13	-	-	-	12,000,000	-	-	-	12,000,000
UHDS Infrastructure Upgrades	11-13	-	-	-	8,000,000	-	-	-	8,000,000
Cross Country Track Expanded Scope	11-13	-	-	1,000,000	3,000,000	-	-	-	4,000,000
<b>Total</b>		<b>\$ 5,276,000</b>	<b>\$ 54,172,035</b>	<b>\$ 115,200,001</b>	<b>\$ 132,746,035</b>	<b>\$ 41,240,000</b>	<b>\$ 21,575,000</b>	<b>\$ 4,847,000</b>	<b>\$ 375,056,071</b>

**Oregon State University**  
**Capital Budget - Major Projects**  
**Fiscal Year 2013**

	Total Authorization	Spent as of 2012	FY13 Budget
Education Hall Remodel	\$ 17,667,228	\$ 15,812,141	\$ 1,855,087
Cultural Centers	10,000,000	1,463,972	8,536,028
AES-Animal Pavillion	10,000,000	3,728,102	6,271,898
New Business Education Building	56,000,000	1,674,141	54,325,859
Strand Ag Hall Remodel	24,000,000	724,209	23,275,791
Cascades Graduate Studies Building	5,000,000	4,545,683	454,317
Sports Performance Center	12,000,000	1,368,613	10,631,387
Cross Country Track	4,000,000	3,959,487	40,513
New Residence Building	30,000,000	999,597	29,000,403
Student Experience Center	43,000,000	992,166	42,007,834
Gill Coliseum Renovation	20,000,000	8,331,947	11,668,053
Student Success Center	14,000,000	11,211,216	2,788,784
HP Building 11 Renovation	9,500,000	8,495,394	1,004,606
<b>Total</b>	<b>\$ 255,167,228</b>	<b>\$ 63,306,670</b>	<b>\$ 191,860,558</b>



## OREGON STATE UNIVERSITY - CASCADES

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.



**Oregon State University - Cascades**  
**Initial Budget State Appropriation**

	FY2012	FY2013	Dollar Change	% Change
<b>State Appropriation</b>				
Undergraduate funding	\$ 777,880	\$ 887,041	\$ 109,161	14.0%
Graduate funding	257,042	300,113	43,071	16.8%
Enrollment growth	-	48,964	48,964	-
<b>Total Enrollment Funding</b>	<b>1,034,922</b>	<b>1,236,118</b>	<b>201,196</b>	<b>19.4%</b>
<b>Targeted Programs</b>				
Regional Support				
Retrenchment	116,685	121,447	4,762	4.1%
Retention & Graduation	204,197	212,532	8,335	4.1%
Underpinning	204,197	212,532	8,335	4.1%
Regional Solutions	-	12,000	12,000	-
Regional University Support Adjustment	2,472,489	2,535,317	62,828	2.5%
Regional University Support Settle-up FY12	-	(80,641)	(80,641)	-
<b>Total Regional Support</b>	<b>2,997,568</b>	<b>3,013,187</b>	<b>15,619</b>	<b>0.5%</b>
<b>Other</b>				
Engineering Technology Undergraduate	16,647	8,813	(7,834)	-47.1%
Engineering Technology Undergraduate Settle-up-FY12	-	(8,618)	(8,618)	-
<b>Total Other</b>	<b>16,647</b>	<b>195</b>	<b>(16,452)</b>	<b>-98.8%</b>
<b>Total State Appropriation</b>	<b>\$ 4,049,137</b>	<b>\$ 4,249,500</b>	<b>\$ 200,363</b>	<b>4.9%</b>



**Oregon State University - Cascades**  
**FY13 Revenue Summary with Comparison to FY12**

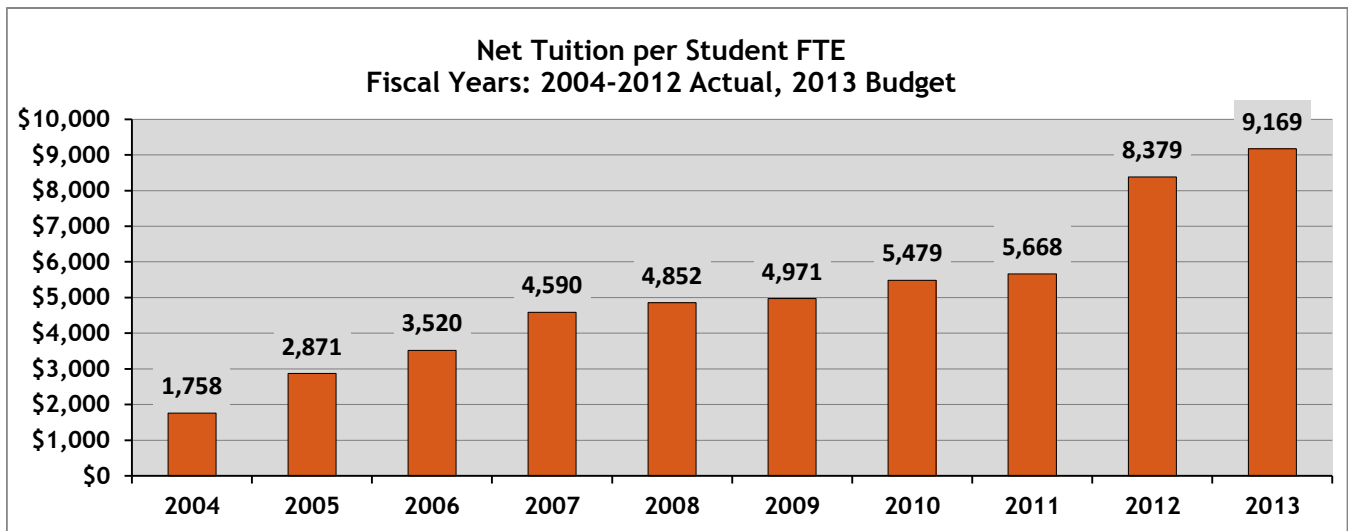
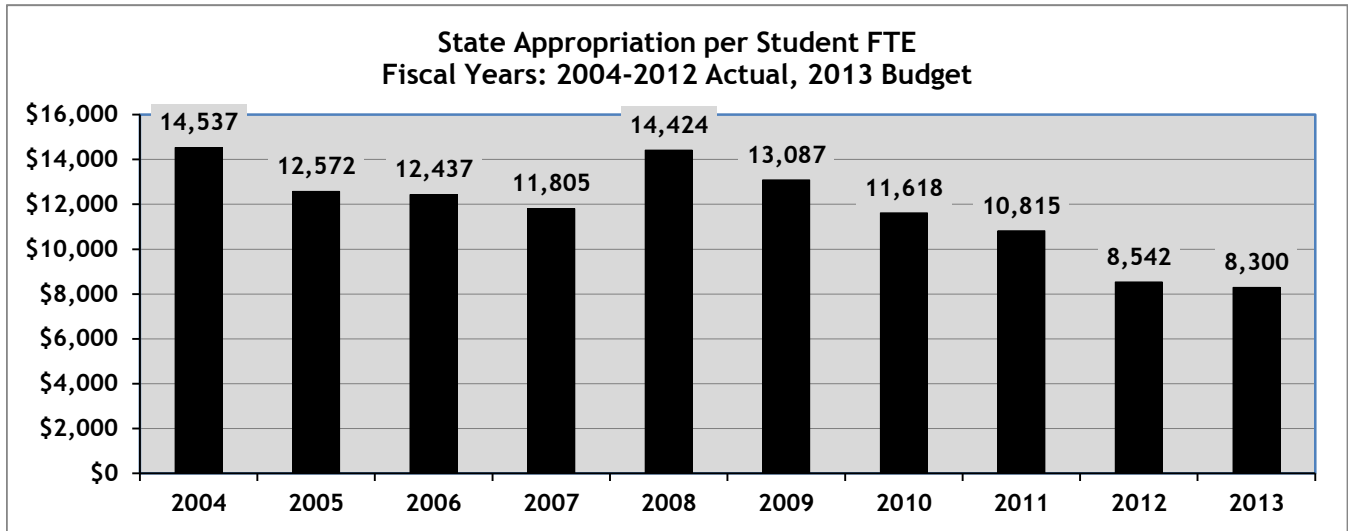
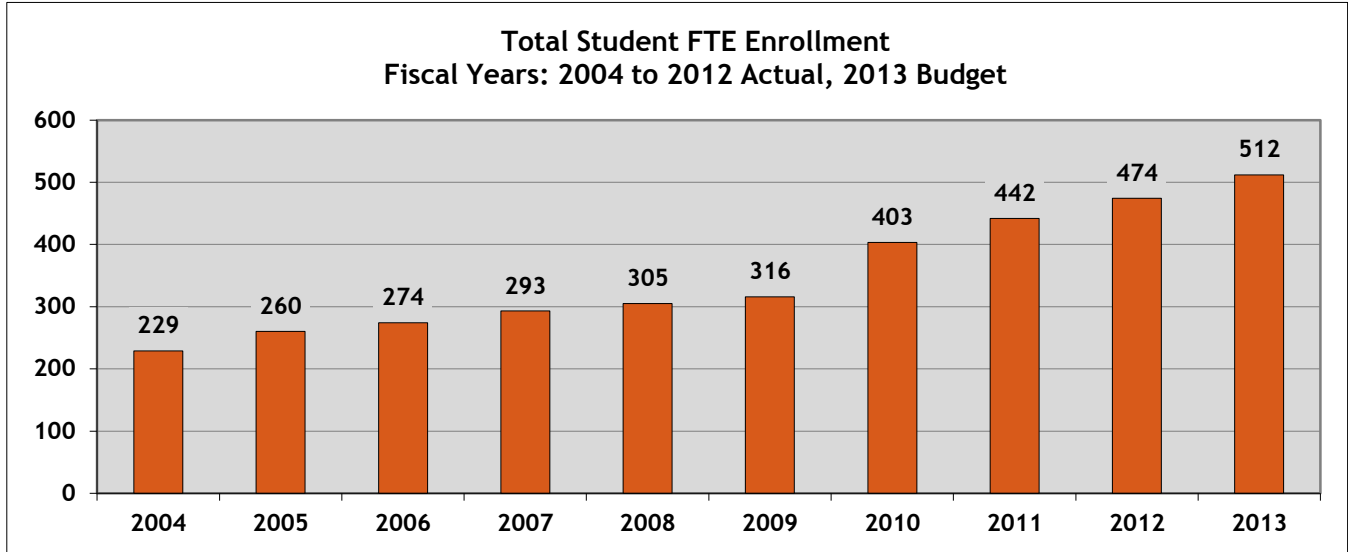
	FY12	FY13	FY13 Over (Under)	
	Initial Budget	Initial Budget	FY12	
			\$	%
<b><u>STATE APPROPRIATION</u></b>				
RAM Cell Funding	\$ 1,140,526	\$ 1,236,118	\$ 95,592	8.4%
Targeted Programs:				
Regional Support	3,303,442	3,013,187	(290,255)	-8.8%
Other Targeted Programs	18,346	195	(18,151)	-98.9%
<b>SUBTOTAL TARGETED PROGRAMS</b>	<b>3,321,788</b>	<b>3,013,382</b>	<b>(308,406)</b>	<b>-9.3%</b>
<b>TOTAL STATE APPROPRIATION</b>	<b>4,462,314</b>	<b>4,249,500</b>	<b>(212,814)</b>	<b>-4.8%</b>
<b>Tuition &amp; Fees:</b>				
Tuition	4,124,843	4,695,752	570,909	13.8%
Student Fees	177,150	173,134	(4,016)	-2.3%
Less Tuition Remissions	-	(1,308)	(1,308)	-
<b>SUBTOTAL NET TUITION &amp; FEES</b>	<b>4,301,993</b>	<b>4,867,578</b>	<b>565,585</b>	<b>13.1%</b>
<b>Other Revenue</b>				
Sales & Services Revenue	8,000	197,224	189,224	2365.3%
<b>TOTAL EDUCATIONAL AND GENERAL REVENUES</b>	<b>\$ 8,772,307</b>	<b>\$ 9,314,302</b>	<b>\$ 541,995</b>	<b>6.2%</b>

**Oregon State University - Cascades**  
**FY13 Budget Allocation Summary with Comparison to FY12**

	<b>FY12 Initial Budget</b>	<b>FY13 Initial Budget</b>	<b>% Chg</b>
<b><u>Centrally Administered Funds</u></b>	<b>\$ 430,130</b>	<b>\$ 165,022</b>	<b>-61.6%</b>
<b><u>Direct Instruction and Research Delivery</u></b>			
Instructional Research Support <sup>1</sup>	449,096	209,287	-53.4%
Education	582,553	789,259	35.5%
Counseling	354,583	572,521	61.5%
Psychology	228,901	279,906	22.3%
Humanities	328,283	411,240	25.3%
Art Instruction	188,488	256,464	36.1%
Business and Technology Instruction	544,742	583,486	7.1%
General Science & Biology	179,842	227,806	26.7%
Health and Human Sciences	270,792	513,163	89.5%
Natural Resources Instruction	232,044	280,965	21.1%
Outdoor Recreation Leadership/Tourism	195,576	227,712	16.4%
Engineering	201,452	341,677	69.6%
Library	157,290	157,957	0.4%
Oregon National Guard Gold Program	500	250	-50.0%
<b><i>Direct Instr and Research Delivery Total</i></b>	<b>3,914,142</b>	<b>4,851,693</b>	<b>24.0%</b>
<b><u>Service, Support, and Management:</u></b>			
Executive Office	815,646	485,082	-40.5%
Academic Affairs/Student Affairs	795,293	807,877	1.6%
Advising & Enrollment Services	531,745	509,115	-4.3%
Finance and Administration	375,480	663,956	76.8%
Marketing/Communication/Development	472,470	408,599	-13.5%
Facilities	950,000	794,928	-16.3%
IT Infrastructure	487,400	628,030	28.9%
<b><i>Service, Support, and Management Total</i></b>	<b>4,428,034</b>	<b>4,297,587</b>	<b>-2.9%</b>
<b>Distributable Budget and Targeted Programs</b>	<b>8,342,176</b>	<b>9,149,280</b>	<b>9.7%</b>
<b>Total Budget:</b>	<b>\$ 8,772,306</b>	<b>\$ 9,314,302</b>	<b>6.2%</b>

<sup>1</sup> Reserve to be distributed to departments throughout the year.

## Oregon State University - Cascades



Source: OUS Institutional Research, FY13 Cascades Initial Budget.

## Oregon State University

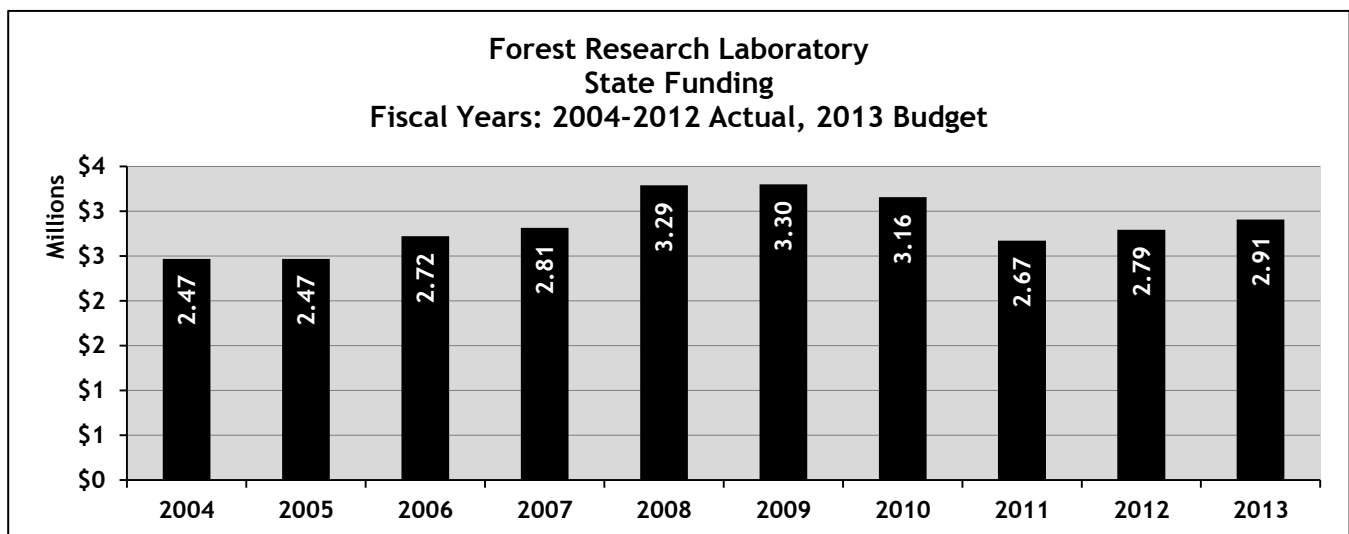
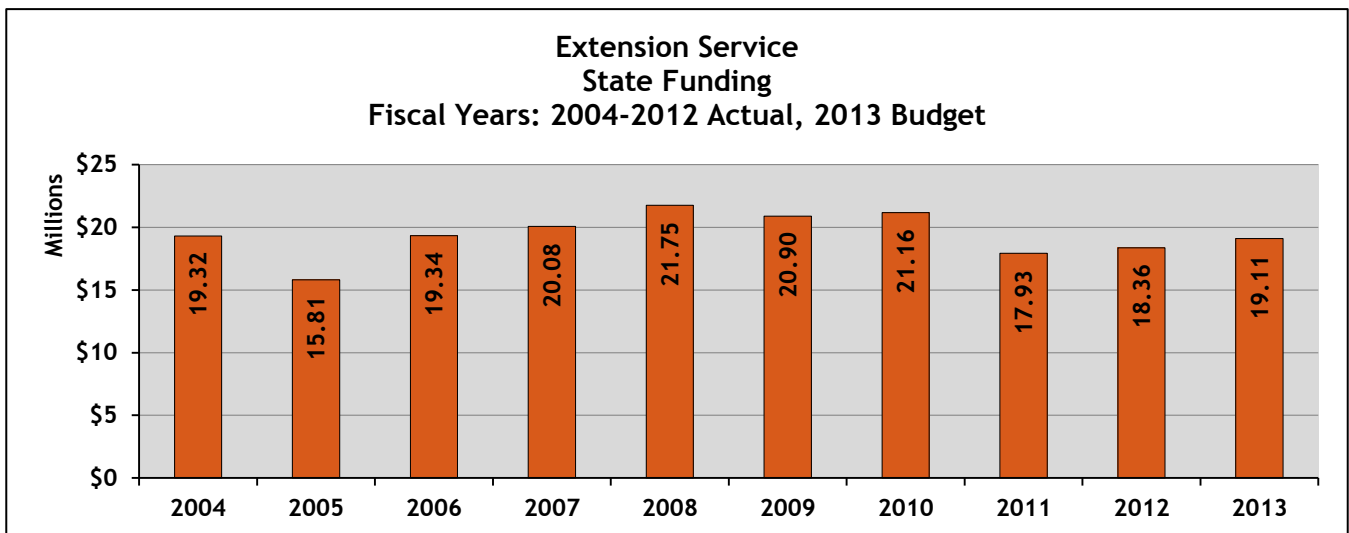
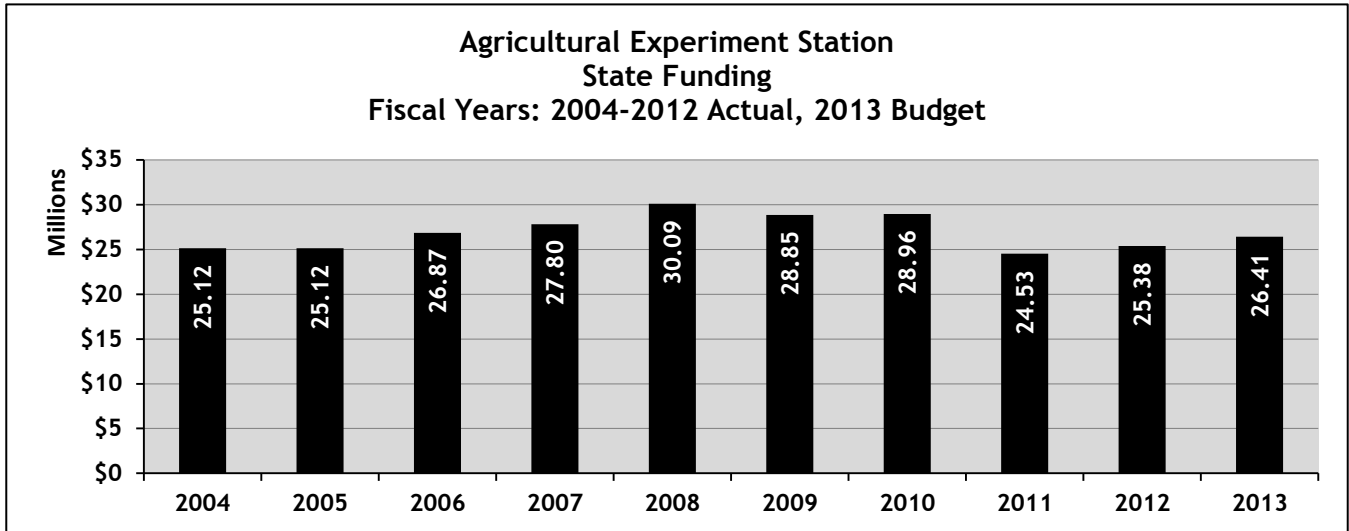
### Statewide Public Services

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.



## Oregon State University Statewide Public Services



Oregon State University  
**Statewide Public Services**  
Ratio of State Resource Expenditures to All Other  
Fiscal Years: 2004-2012 Actual

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

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

Oregon State University  
**Statewide Public Services**  
Ratio of State Resource Expenditures to All Other  
Fiscal Years: 2004-2012 Actual

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

FOREST RESEARCH LABORATORY				
Fiscal Year	State Resource Expenditures	All Other Expenditures	Other/State Ratio	
FY2004	\$ 2,469,320	\$ 16,795,264	6.80	
FY2005	\$ 2,469,319	\$ 16,812,786	6.81	
FY2006	\$ 2,721,946	\$ 18,048,312	6.63	
FY2007	\$ 2,814,706	\$ 16,956,805	6.02	
FY2008	\$ 3,290,501	\$ 17,486,042	5.31	
FY2009	\$ 3,300,213	\$ 18,445,700	5.59	
FY2010	\$ 3,155,898	\$ 18,871,417	5.98	
FY2011	\$ 2,673,319	\$ 17,286,988	6.47	
FY2012	\$ 2,792,355	\$ 18,960,984	6.79	





**Oregon State University  
Athletics  
Education & General Funds Budget**

*Athletic Department Revenue Provided to the Education & General Fund and Support Given to the  
Athletic Department from the Education & General Fund*

**Fiscal Years: 2003-2011 Actual, 2012-2016 Estimate**

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.

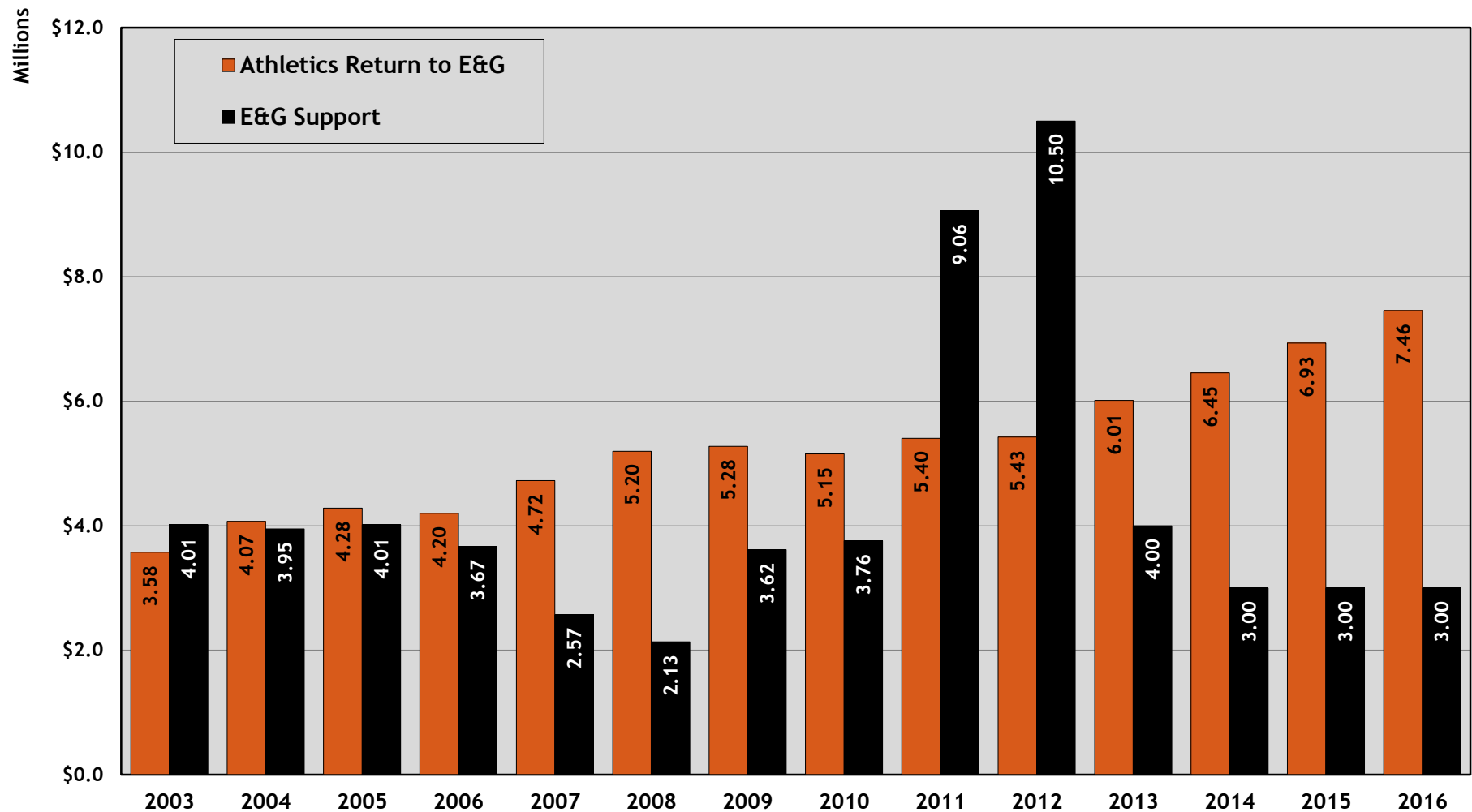
The graph conservatively shows the measurable funding effect the Athletic Department has on the University. Except for fiscal years 2003, 2011 and 2012, the Athletic Department has annually supported the University in excess of the E&G funding received through payment of student-athlete tuition and fees 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.).



## Oregon State University Athletics

Revenue Provided to/Support Given from Education & General Funds Budget  
Fiscal Years: 2003-2012 Actual, 2013-2016 Estimate



Source: OSU Data Warehouse, FY12 Initial Education and General Budget, OSU Athletics Department

Revenue from Athletics includes scholarships (received by OSU as tuition revenue), student fees and assessments paid to E&G.



## Oregon State University Extended Campus

### Ecampus Revenue Allocation Model (ERAM)

#### 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<sup>1</sup>**

				Productivity Reallocation		Net Tuition		Fee	
						\$	25,011,774	100.00%	\$75 per SCH
				\$	1,425,113	100.00%	Academic Units	80.00%	Less: Financial Aid
				Unit	Academic Units	66.40%	Ecampus	10.00%	Plus: Developmental Math
				Distribution %	Admin Units <sup>2</sup>	33.60%	Administration <sup>3</sup>	10.00%	& Credit Workshops
Academic Units:									
Ag Sciences	15.95%	\$	150,956			\$	1,973,740		
Business	4.09%		38,702				649,549		
Education	3.31%		31,351				1,202,763		
Forestry	3.15%		29,842				647,445		
Pharmacy	0.21%		2,006						
Science	17.24%		163,137				3,307,631		
Graduate School	0.06%		584						
Liberal Arts	41.42%		391,970				6,527,606		
Earth, Ocean & Atmospheric	6.00%		56,789				600,000		
Engineering	1.83%		17,293				393,063		
Academic Affairs	0.15%		1,448						
PHHS	6.57%		62,196				1,089,978		
Academic Units Total	100.00%		946,274	66.40%		\$	20,009,419	80.00%	0
E-Campus							2,501,177	10.00%	8,823,395 <sup>5</sup>
Administration			478,838	33.60%			2,501,177 <sup>4</sup>	10.00%	
Total		\$	1,425,112	100.00%		\$	25,011,774	100.00%	\$ 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.