Oregon State UNIVERSITY OSU

Education and General Fund Budget

Fiscal Year 2009

July 1, 2008 – June 30, 2009

Office of Budget and Fiscal Planning

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Oregon State University
Fiscal Year 2009
Education and General Fund Budget

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Introduction

Strategic Plan

OSU's Strategic Plan, adopted in February 2004, provides a clear focus for setting budgetary priorities. The Plan sets out a vision to be among the Top 10 land grant institutions in America with the following goals:

1. Provide outstanding academic programs that further strengthen our performance and pre-eminence in the five thematic areas

    - Understanding the origin, dynamics, and sustainability of the Earth and its resources.

    - Optimizing enterprise, technological change, and innovation.

    - Realizing the potential of the life sciences and the optimal delivery of public health services in healthy environments.

    - Managing natural resources that contribute to Oregon's quality of life, and growing and sustaining natural resources-based industries in the Knowledge Economy.

    - Building and maintaining a strong curriculum and basic inquiry in the arts and sciences that contributes to all parts of the University.

2. 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.

3. Substantially increase revenues from private fundraising, partnerships, research grants, and technology transfers while strengthening our ability to more effectively invest and allocate resources.

The Strategic Plan has guided university decision-making through difficult financial times over the past few years as state funding declined and cost pressures increased. The university will be reviewing and updating the Strategic Plan over the next year.

SUMMARY

The FY 2009 Education and General Budget is up by $15 million or 5.7% over the FY 2008 budget. The increase is due largely to a $8.3 million increase in tuition and fee revenue and a $5.7 million increase in state funding.

A decrease in graduate student enrollment resulted in a $2.2 million reduction in state funding that had been budgeted for projected enrollment growth for the 2007-2009 biennium. In June 2008, the Legislature made a 20% reduction in the Governor's salary pool, which had been set aside to cover compensation increases for the biennium. This

resulted in a $1.5 million decrease in state funding available for the Education and General budget.

Given these reductions in projected state funding, the revenue increase will not be sufficient to cover planned increases in employee salaries, other payroll expense, and expected utilities cost increases. Colleges and support units will be expected to cover cost increases within their budgets, which are estimated to be approximately 3% below the amount needed to maintain the current service level.

HISTORY AND BACKGROUND

During the 2005-2007 biennium, OSU received a small increase in state revenue and was allowed a 3% increase in tuition rates. Despite this modest gain, funding for the operating budget did not keep pace with increasing costs, particularly for staff retirement and health insurance costs. The university reduced planned expenditures by $14 million over a two-year period with each unit expected to make at least a 5% budget adjustment.

Guided by the Strategic Plan, the budget plan reflected reductions in administrative support costs, efforts to mitigate budget reductions in academic units, and significant new investments to support strategic objectives in core academic programs and research.

In FY 2008, state appropriations increased by 16.5% or $15 million over FY 2007 revenues. The increase over the prior year included $6.7 million targeted to specific programs and $7.4 million to support the base budget. The increase represented the first step in a plan to reverse decades of state disinvestment in higher education in Oregon. However, midway through the year, a declining state revenue forecast resulted in the 20% reduction to the Governor's salary pool noted above. Future progress on the re-investment plan is likely to be impacted by lack of sufficient state revenues.

Education and General Budget Summary	FY07	FY08	% inc	FY09	% inc
Total Revenues	247,088	271,036	9.7%	279,190	3.0%
Total Expenses	242,546	259,598	7.0%	279,190	7.5%
Net Change	4,542	11,438		-	
Beginning Fund Balance	18,149	22,691		34,129	
Ending Fund Balance	22,691	34,129		34,129	

Budget Allocation Method

In FY 2007, 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.

The Budget Allocation Model (BAM), which had been used for four years to allocate budgets based on productivity measures, was "frozen" for FY 2007. Distributable revenues for each unit were held at prior year levels with two major exceptions:

FY 2007

1) A total of $2.5 million in additional budget was shifted to four academic units through the rebasing process: the Colleges of Liberal Arts, Science, Business, and Health and Human Sciences. These funds were generated from additional administrative charges to Auxiliary operations, Statewide Public Service Programs, and a reduction in E&G spending for Athletics.

2) A number of unit budgets were adjusted so that all units would be required to make minimum expense reductions of approximately 5% for FY 2007.

FY 2008

1) A total of $1.25 million in additional budget was shifted to four academic units through the rebasing process: the Colleges of Liberal Arts, Science, Business, and Health and Human Sciences, with funds generated from 10% E Campus tuition and an increase in administrative charges to Statewide Public Service Programs.

2) Incremental ICR revenues of $300,000 were allocated to the Research Office to support major research infrastructure improvements.

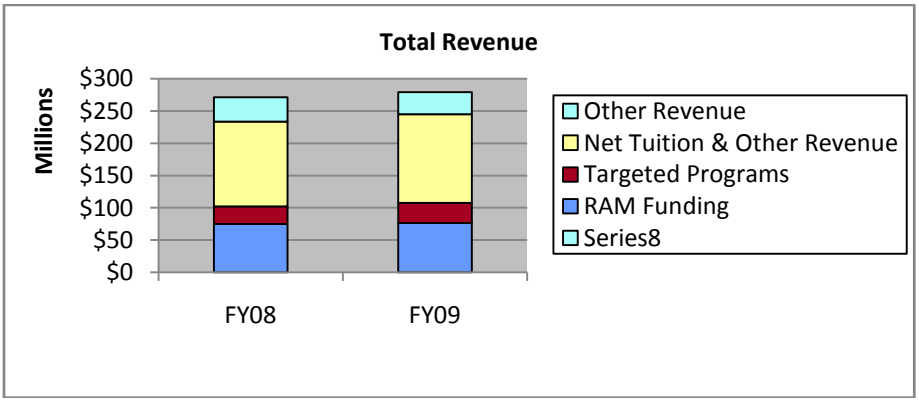
3) Three year trends for Student Credit Hours (SCH) generated by each academic unit were calculated and used to inform budget decisions. In FY 2009 SCH trends will be used to re-calibrate base budgets formulaically.

In FY 2008, $3.35 million in Ed & General revenues were re-directed to core instruction programs and research through the university's re-basing process and strategic investments ($1.8 million to six colleges and four research initiatives).

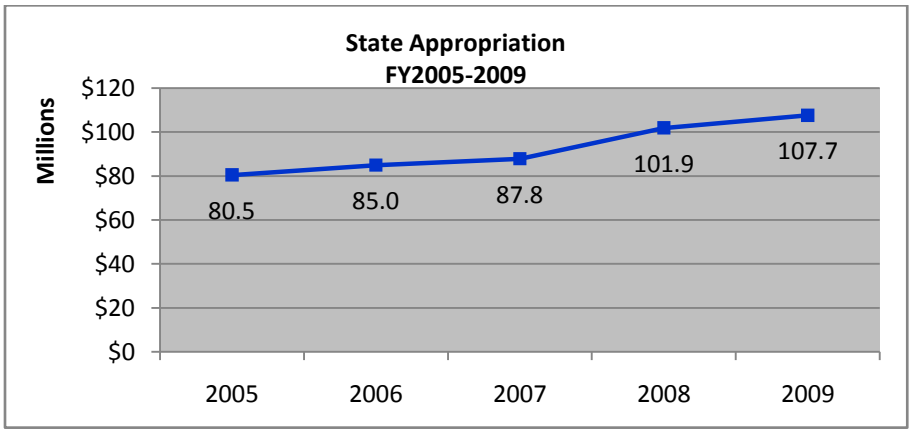
FY 2009 REVENUE BUDGET

Revenue budget

The FY 2009 E&G budget of $279.2 million reflects a 5.7% increase over the FY 2008 initial budget and a 3% increase over FY 2008 actual revenues.

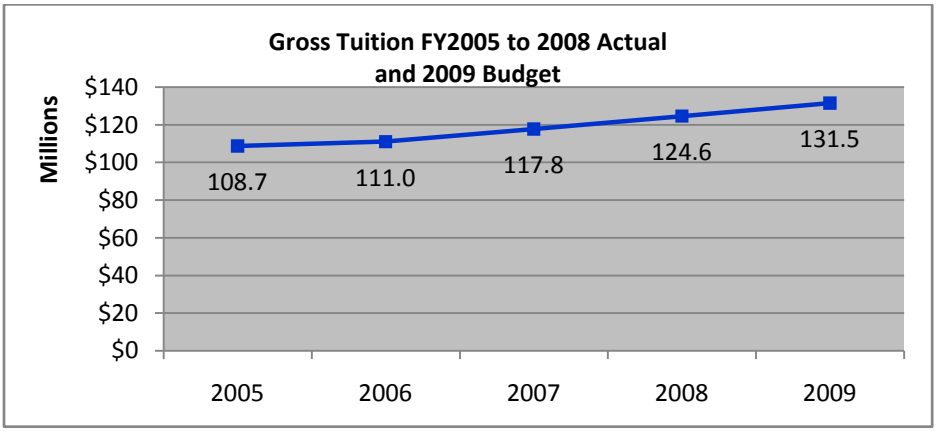


- **State appropriations are expected to increase by 5.6% or $5.7 million over FY 2008 revenues.** The increase over the prior year includes $4 million, or 4% for inflation increases and $1.7 million in projected funding to be allocated by the Legislature to support a portion of salary and benefits cost increases. If state revenue forecasts for the current biennium continue to decline, there is a possibility that state appropriations could be reduced during the current fiscal year.

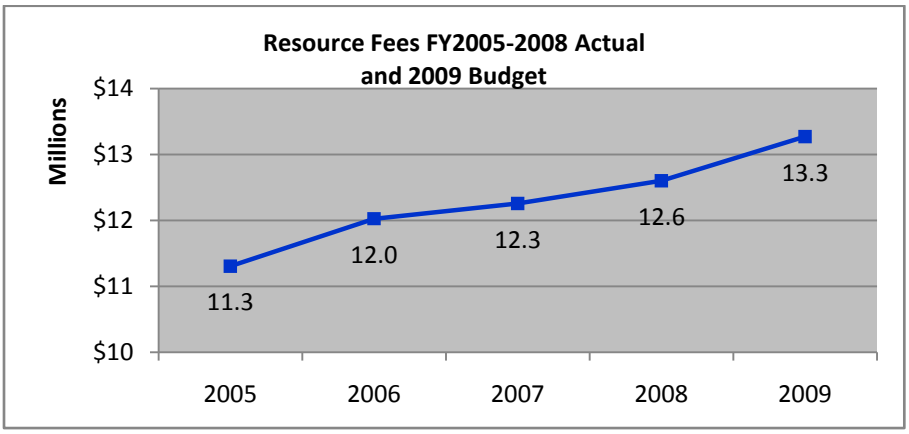


- **Gross tuition revenues are projected to increase by 5.5%, or $6.9 million**, with resident undergraduate rate increases capped at 3.4%, graduate tuition increases of 3%, and modest projected enrollment increases. Tuition revenues for Extended Campus are expected to increase by 8.9% or $1.2 million over FY 2008 actual revenue. In FY 2008 revenues generated by increases in non-

resident undergraduate student enrollment were partially offset by reductions in graduate student FTE. For FY 2009 projections for undergraduate enrollment is for modest growth in resident student FTE and continued increases in non-resident enrollment. Graduate student enrollment is expected to be flat or to decline slightly.



- **Resource fees are budgeted at $13.3 million, up $668,000 above last year's level.** While there are no new fees, the technology resource fee and registration fee have been increased. The Legislative cap on fee remissions as a percentage of gross tuition is still in place.



In January 2008 the OUS Board directed campuses to eliminate resource fees for undergraduate students by 2011 based on student requests for greater transparency in tuition and fee schedules. After extensive campus conversations at OSU, the following implementation plan was developed for resource fees/differential tuition for undergraduate students. **The change will be effective next year in Fall 2009**.

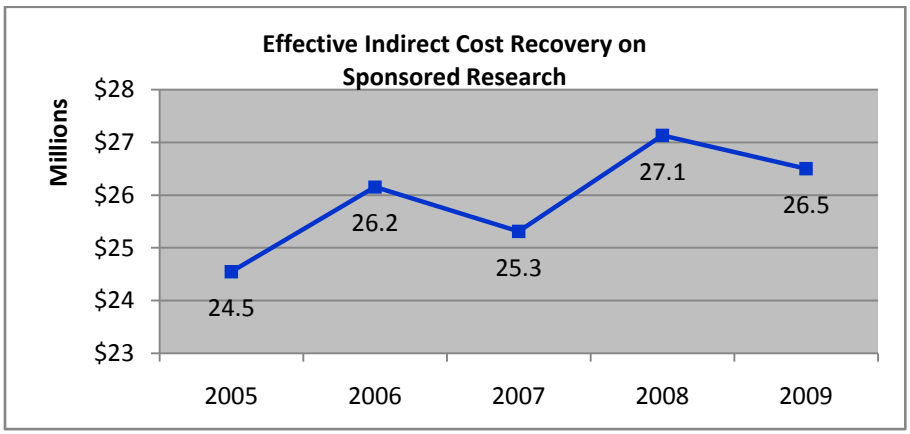
- The elimination of resource fees is revenue neutral to the university and avoids major impact on students.
- All resource fees will be rolled into tuition, except for the programmatic fees in the Colleges of Business and Engineering and the Honors College. The programmatic fees in the Colleges of Business and

Engineering and the Honors College will be converted to differential tuition.

- General tuition will be increased to raise 10% of the differential tuition amount for fee remissions for students paying a differential tuition.
- For colleges/units that are currently charging programmatic resource fees, base budgets will be adjusted to make the transition revenue neutral.
- All *universal* resource fees (e.g. Technology Resource Fee) will be rolled into tuition, but will be allocated for the intended purpose.
- Per the State Board directive, the *one-time matriculation fee* will be assessed as a one-time charge for new students and it will not be part of the tuition.

Fee remissions are budgeted at 10% of gross tuition at $13.3 million for FY 2009, up $1 million over FY 2008. In FY 2008 OSU developed a new scholarship program to complement the improvements made by the legislature in the Oregon Opportunity Grant. 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 supplemental gift aid to cover resident tuition and fees.

Indirect cost recovery (ICR) on sponsored programs is projected at $26.5 million, up $1 million from the previous year's initial budget and approximating the same as FY 2008 actual. OSU's indirect cost rate increased from 41.5% to 46.2 % due to rate negotiations with the federal government in the fall of FY 2007, which is beginning to impact ICR revenue. FY 2009 is set to be the base year for negotiating a new indirect cost rate with the federal government.

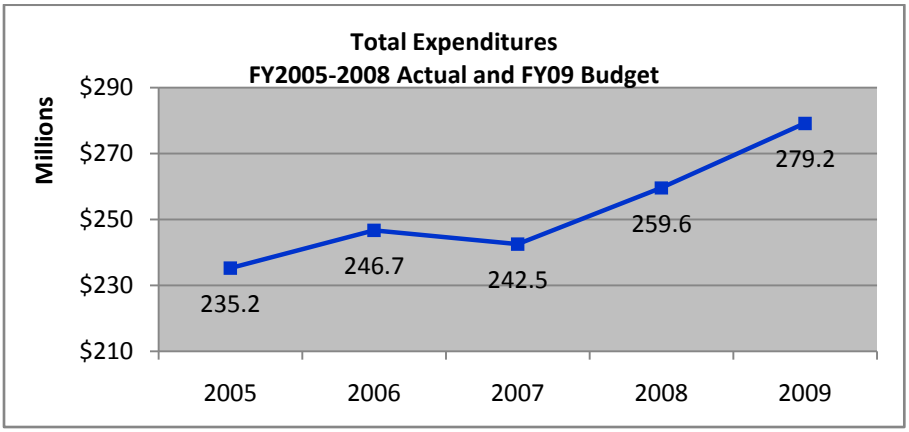


- **Interest income, departmental income and all other revenues are projected to be relatively flat** based on unit projections**.**

Tuition income remains the largest single revenue source for OSU's Education and General Fund budget at 48.7%. The percentage of state support, which dropped dramatically since FY 2000 from 50.3% to 37.6% for FY2007, increases to 38.6% for FY 2009.

Expenditures

Expenses are budgeted to increase by 7.5% in FY 2009 compared to FY 2008 actuals to balance with anticipated revenues of $279.2 million. OSU underspent actual revenues in FY 2008 by $11.4 million, resulting in an increase in ending fund balances. The majority of fund balances are already committed; however, some of these funds are can be used on a short-term basis to allow units planning time to bring spending within available revenue streams.



In addition to the distributable revenues or base budgets, academic and administrative units are impacted by other factors such as departmental revenues, targeted legislative appropriations, organizational changes and strategic investments. Noteworthy budget changes for FY 2009 compared to FY 2008 include:

- **Completion of a five-year $1.8 million annual commitment to support strategic plan initiatives** at OSU;
- **Addition of $500,000 to support strategic Information Technology initiatives;**
- **Increased funding of $140,000 to support the Office of Women's Advancement and Gender Equity;**
- **Additional funding for the Faculty Diversity Initiative of $120,000;**
- **Allocation of $300,000 in additional incremental ICR dollars** to support research infrastructure;
- **Allocation of rebasing dollars of $1.25 million** to the Colleges of Liberal Arts, Science, Business, and Health and Human Sciences for the third year in the five-year plan;
- In its sixth year of a revised funding model, Ecampus is anticipated to provide $7.7 million in funding for academic units and $480 thousand for support costs to

the Library, Information Services, Student Affairs and Graduate School. Ecampus will continue to remit 10% of tuition dollars centrally to support the rebasing effort. **In addition, E Campus will contribute $800,000 from its fund balance to central funding to support university initiatives.**

For the Future

The Oregon University System emerged from the 2007 Legislative Session with a budget that reflected a modest first step in a long-term re-investment plan for the system. The budget included funding for the essential budget level, enhancing faculty salaries, reducing student-faculty ratios, additional support for regional campuses including OSU Cascades, enrollment growth, and facilities maintenance. In addition the budget proposal included policy package requests for OSU for ETIC, Statewide Public Service Programs, the Veterinary Diagnostic Laboratory, and the proposed Institute for Ecosystems and Climate Change.

But eight months later full funding for the 2007-2009 biennium was put at risk as the economy weakened, and the Legislative Emergency Board reduced salary pool funding by 23%. The state revenue forecast for the 2009-2011 biennium predicts that available revenues will be $500 million to $700 million short of the amount needed to fund the essential budget level.

Although OSU received a significant increase in state funding for the 2007-2009 biennium, Oregon continues to lag the U.S. average funding level per student by a wide margin.

Unless the state obtains new sources of revenue, it is not probable that the state can maintain the current level of funding for the university system let alone continue the planned re-investment. Legislative constraints on tuition and fees, which were tied to increases in median family income for undergraduate resident students, are likely in the future.

Despite modest real growth in allocable revenues, the FY 2009 budget continues to reflect significant investments to support strategic objectives in research, future revenue growth from enrollment management activities, programs and core academic programs.

Among OSU's strategies for future expansion, including enhanced program quality, access and affordability for Oregon students, are enrollment strategies designed to supplement state funding support with additional nonresident tuition revenue. In FY 2005 the university initiated a multi-year initiative to increase nonresident enrollments, and the results over the past two years are encouraging.

OSU is working with INTO University Partnerships to recruit international students into a one-year pathway program with many of those students then matriculating into the university. The expected increase in international student enrollment will help the university to meet its strategic diversity goals and will also provide an additional revenue stream.

Together with the OSU Foundation, OSU is pursuing opportunities to significantly expand fundraising activity to provide immediate and long term support for academic

programs, scholarships and capital projects. To date these efforts have proven very successful and are a promising source of future support for OSU's strategic plan. As of August 2008, the OSU Capital Campaign has raised $441 million toward the $625 million goal.

In summary, though OSU enters FY 2009 and subsequent years facing many financial challenges, OSU remains fiscally sound and is positioned to achieve its future program goals through diversified future revenue sources.

Acknowledgements

This booklet itself 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: Provost, Sabah Randhawa; V.P for Finance and Administration, Mark McCambridge; University Budget Committee members; Frank Bernieri, Bill Boggess Jim Carrington, Thomas Cutsforth, Curt Davis, Gary Delander, Thayne Dutson, Sally Francis, Becky Johnson, Walt Loveland, Luke McIlvenny, Mike Oriard, Kate Peterson, and my colleagues Terri Cook, Jeannie Davis, Karen Meador, and Eric Yahnke in the Office of Budget and Fiscal Planning.

Respectfully submitted,

Nancy Heiligman
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Oregon State University
Multi-Year Revenue Detail

	FY08			FY09			
	Budget	Actual	% VAR	Distributed Resources	Departmental Resources	Total	Budget Change
Undergraduate	$46,035,147	$46,035,147	-	$47,543,865	-	47,543,865	3.3%
Graduate	28,632,825	28,632,825	-	29,369,544	-	29,369,544	2.6%
FY08 enrollment Settle-up	-	-		(770,777)		(770,777)	-
Retention & Enrollment Incentives	-	-	-	232,000	-	232,000	-
Cell Funding	**74,667,972**	**74,667,972**		**76,374,632**	**-**	**76,374,632**	2.3%
Targeted Programs:							
Facilities Services: SWPS Buildings/Maintenance	2,003,851	2,003,851	-	2,085,640	-	2,085,640	4.1%
Sponsored Research Support	2,269,462	2,269,462	-	2,362,094	-	2,362,094	4.1%
Research Faculty Salary Support	634,305	634,305	-	660,196	-	660,196	4.1%
Campus Public Service Programs	1,010,278	1,010,278	-	-	1,051,514	1,051,514	4.1%
Systemwide Information Technology Services	2,780,378	2,780,378	-	-	2,893,863	2,893,863	4.1%
Systemwide Expenses/Programs:							
Endowment Match	775,408	775,408	-	(1,095,304)	1,902,363	807,059	4.1%
Orbis	38,945	38,945	-	-	40,535	40,535	4.1%
Oregon Joint Schools of Professional Business	91,626	91,626	-	-	95,365	95,365	4.1%
Department of Justice Legal Services	125,001	125,001	-	-	130,104	130,104	4.1%
Faculty Diversity	70,950	70,950	-	73,845	-	73,845	4.1%
Services to Students with Disabilities	44,649	44,649	-	-	46,471	46,471	4.1%
Natural Heritage Program	52,703	52,703	-	-	54,854	54,854	4.1%
Engineering - ETIC	9,741,877	9,741,877	-	-	9,741,877	9,741,877	0.0%
Engineering Resident Graduates	1,469,348	1,469,348	-	1,566,073	-	1,566,073	6.6%
Signature Research Centers	241,882	241,882	-	-	251,754	251,754	4.1%
Natural Resource Funding	225,241	225,241	-	-	234,434	234,434	4.1%
Climate Center					180,000	180,000	-
Vet Diagnostic Lab	367,500	367,500	-	-	382,500	382,500	-
Vet Med 4 Year Program	1,614,138	1,614,138	-	-	1,680,022	1,680,022	4.1%
Targeted Programs	**23,557,542**	**23,557,542**	-	**5,652,544**	**18,685,656**	**24,338,200**	3.3%
Faculty Salaries	804,057	804,057	-	1,608,113	-	1,608,113	-
Student Faculty Ratio	764,622	764,622	-	1,529,247	-	1,529,247	-
Utilities	447,395	447,395	-	465,655	-	465,655	-
Subtotal - State Appropriation	**100,241,588**	**100,241,588**	-	**85,630,191**	**18,685,656**	**104,315,847**	**4.1%**
Mid-year Salary Pool Funding	**1,697,280**	**1,677,913**	-	**3,355,825**	**-**	3,355,825	-
Subtotal - Total State Funding	**101,938,868**	**101,919,501**	**-**	**88,986,016**	**18,685,656**	**107,671,672**	**5.6%**
Tuition:							
OSU - Corvallis	108,311,919	109,449,129	1.0%	115,219,749	-	115,219,749	6.4%
Extended Campus	10,542,353	10,762,664	2.1%	-	11,717,376	11,717,376	11.1%
Summer Term	4,693,239	4,369,078	-6.9%	-	4,542,632	4,542,632	-3.2%
Subtotal - Tuition	**123,547,511**	**124,580,871**	0.8%	**115,219,749**	**16,260,008**	**131,479,757**	**6.4%**
Tuition Waivers	**(12,297,016)**	**(11,448,782)**	-6.9%	**(13,145,647)**	**(200,000)**	**(13,345,647)**	**8.5%**
Student Fees:							
Resource Fees	7,005,720	7,291,824	4.1%	-	7,687,161	7,687,161	9.7%
Technology Resource Fee	5,280,000	5,311,725	0.6%	-	5,584,380	5,584,380	5.8%
Total Resource Fees	12,285,720	12,603,549	2.6%	-	13,271,541	13,271,541	8.0%
Other Student Fees	5,221,446	6,136,491	17.5%	-	5,691,773	5,691,773	9.0%
Subtotal - Student Fees	**17,507,166**	**18,740,040**	7.0%	**-**	**18,963,314**	**18,963,314**	**8.3%**
Other Resources:							
Indirect Cost Recovery / Returned Overhead	25,500,000	27,154,867	6.5%	11,693,000	14,807,000	26,500,000	3.9%
OUS Portion of Indirect Cost Recovery	(1,020,000)	(1,085,059)		-	(1,060,000)	(1,060,000)	-
Sales & Services / misc income	7,826,015	9,779,927	25.0%	-	7,856,039	7,856,039	0.4%
Earned Interest on Accounts Receivable	1,125,000	1,394,477	24.0%	1,125,000	-	1,125,000	-
Subtotal - Other Resources	**33,431,015**	**37,244,212**	11.4%	**12,818,000**	**21,603,039**	**34,421,039**	**3.0%**
Total Revenue	**264,127,544**	**271,035,842**	2.6%	**203,878,118**	**75,312,017**	**279,190,135**	**5.7%**

Oregon State University
FY09 Revenue Summary with Comparison to FY08
(thousands of dollars)

	FY08 Initial Budget*	FY09 Initial Budget*	FY08 Over (Under) FY07 $	%
RAM Cell Funding	**$ 74,668**	**$ 76,375**	$ 1,707	2.3%
Targeted Programs:				
Facilities Services: SWPS Buildings/Maint	2,004	2,086	82	4.1%
Sponsored Research Support	2,269	2,362	93	4.1%
Research Faculty Salary Support	634	660	26	4.1%
Campus Public Service Programs	1,010	1,052	41	4.1%
Systemwide Information Technology Services	2,780	2,894	113	4.1%
Systemwide Expenses/Programs:				
Endowment Match	775	807	32	4.1%
Orbis	39	41	2	4.1%
Oregon Joint Schools of Prof Business	92	95	4	4.1%
Department of Justice Legal Services	125	130	5	4.1%
Faculty Diversity	71	74	3	4.1%
Services to Students with Disabilities	45	46	2	4.1%
Natural Heritage Program	53	55	2	4.1%
Oregon Engineering Education Invest Fund	9,742	9,742		0.0%
Engineering Resident Graduates	1,469	1,566	97	6.6%
Signature Research Centers	242	252	10	4.1%
Natural Resource Funding	225	234	9	4.1%
Climate Center	-	180	180	-
Vet Diagnostic Laboratory	368	383	15	4.1%
Vet Med 4 year Program	1,614	1,680	66	4.1%
SUBTOTAL TARGETED PROGRAMS	**23,558**	**24,338**	**781**	**3.3%**
Faculty Salaries	804	1,608	804	100.0%
Student Faculty Ratio	765	1,529	765	100.0%
Utilities	447	466	18	4.1%
SUBTOTAL STATE APPROPRIATION	**100,242**	**104,316**	**4,074**	**4.1%**
Mid-Year Salary Pool Funding	1,697	3,356	1,659	97.7%
SUBTOTAL TOTAL STATE FUNDING	**101,939**	**107,672**	**5,733**	**5.6%**
Tuition:				
OSU - Corvallis	108,312	115,220	6,908	6.4%
Extended Campus	10,542	11,717	1,175	11.1%
Summer Term	4,693	4,543	(151)	-3.2%
SUBTOTAL GROSS TUITION	123,548	131,480	7,932	6.4%
(less) Tuition Remissions	(12,297)	(13,346)	(1,049)	8.5%
SUBTOTAL NET TUITION	**111,250**	**118,134**	**6,884**	**6.2%**
Student Fees:				
Resource Fees	7,006	7,687	681	9.7%
Other Student Fees	5,221	5,692	470	9.0%
Technology Resource Fee	5,280	5,584	304	5.8%
SUBTOTAL RESOURCE FEES	**17,507**	**18,963**	**1,456**	**8.3%**
Other Revenues:				
F&A Cost Recovery / Returned Overhead	24,480	25,440	960	3.9%
Sales & Services / Misc Income	7,826	7,856	30	0.4%
Earned Interest on Accounts Receivable	1,125	1,125	-	-
SUBTOTAL OTHER REVENUES	**33,431**	**34,421**	**990**	**3.0%**
TOTAL EDUCATIONAL AND GENERAL REVENUES	**$ 264,128**	**$ 279,190**	**$ 15,063**	**5.7%**

*Excluding OSU-Cascades and Statewide Public Services

Oregon State University
FY09 Budget Allocation Summary with Comparison to FY08
(thousands of dollars)

	FY08 Initial Budget	FY09 Initial Budget				
		Base Budget	Targeted and Departmental	Other Budget Adjustments	FY09 Initial Budget	Pct Chg
Centrally Administered Funds						
Pools and Reserves	$ 6,195		10,199	(901)	$ 9,298	50.1%
Agencies Outside OSU E&G Budget	10,014		9,007		9,007	-10.1%
Distributions to Academic Units	5,628		6,476		6,476	15.1%
Distributions to Administrative Units	957		4,930		4,930	415.1%
Centrally Administered Funds Total	22,794		30,612	(901)	29,711	30.3%
Direct Instruction and Research Delivery						
Agricultural Sciences	8,206	6,102	2,292		8,394	2.3%
Business	7,592	6,146	1,639	150	7,935	4.5%
Engineering	28,565	12,428	16,345		28,773	0.7%
Forestry	3,210	1,968	1,284		3,252	1.3%
HHS	11,778	8,670	3,076	400	12,146	3.1%
Education	2,655	2,025	670		2,694	1.5%
Liberal Arts	21,499	18,868	2,882	300	22,051	2.6%
Oceanic & Atmos. Sci.	6,283	3,435	3,332		6,767	7.7%
Pharmacy	6,143	5,538	995		6,533	6.3%
Science	27,380	22,199	5,240	400	27,840	1.7%
Veterinary Medicine	16,412	8,360	8,578		16,938	3.2%
Summer Session	805		751		751	-6.7%
University Honors College	1,279	960	362		1,322	3.4%
Extended Campus	10,389	498	11,049	(94)	11,453	10.2%
Building Use and Research Equipment	3,060		3,180		3,180	3.9%
International Programs	3,182	1,302	2,561		3,863	21.4%
Library	10,405	9,441	1,012		10,453	0.5%
Research Programs (Centers/Institutes)	7,786	4,856	3,017		7,873	1.1%
Direct Instr and Research Delivery Total	176,629	112,797	68,264	1,156	182,218	3.2%
Service, Support, and Management:						
Facilities Services	19,144	19,321	120		19,441	1.5%
Office of the President	3,157	2,455	746		3,201	1.4%
University Advancement	2,515	2,454	20		2,474	-1.7%
University Business Centers	-	930			930	
Finance and Administration	9,329	8,581	886	(255)	9,212	-1.3%
Graduate School	1,629	1,236	795		2,031	24.7%
Research	2,071	2,127			2,127	2.7%
Provost	3,395	1,301	2,795		4,096	20.7%
Academic Affairs	4,049	3,459	670		4,128	2.0%
Student Affairs	9,554	6,082	3,517		9,598	0.5%
Information Services (w/o Library)	9,861	6,930	3,093		10,022	1.6%
Service, Support, and Management Total	64,704	54,875	12,641	(255)	67,261	4.0%
Distributable Budget and Targeted Programs	241,333	167,672	80,906	901	249,479	3.4%
Total Budget:	$ 264,128	$ 167,672	$ 111,518	$	$ 279,190	5.7%

Oregon State University
Distribution of Centrally Administered Funds

Description	FY08 Initial Budget	FY09 Initial Budget	FY09 Over (Under) FY08 $	%
Pools and Reserves				
Strategic Planning Reserve	$ 1,800,000	$ 1,800,000	$ -	-
INTO Investment Reserve	-	400,000	400,000	-
Enrollment/Retention Reserve	-	232,000	232,000	-
Strategic IT Initiatives	-	500,000	500,000	-
Contingency Fund	768,000	768,000	-	-
Budget Reserve	322,009	981,617	659,608	204.8%
Graduate Tuition Remission Reserve	480,438	538,164	57,726	12.0%
Graduate Costs Reserve	800,000	2,065,000	1,265,000	158.1%
Bad Debt Expense	600,000	600,000	-	-
Returned Overhead Reserve (Dept Admin portion)	569,599	548,370	(21,229)	-3.7%
Research Audit Disallowance Reserve (1% of Recovery)	255,000	265,000	10,000	3.9%
PEBB Reserve	600,000	600,000	-	-
Subtotal	**6,195,046**	**9,298,151**	**3,103,105**	**50.1%**
Transfers to units & agencies outside OSU E&G Budget				
Assessments, Debt Service, Leases	4,975,253	4,221,553	(753,700)	-15.1%
Graduate Tuition Remission Reserve for Statewides	2,100,000	2,100,000	-	0.0%
Foundation Contract	2,788,854	2,535,000	(253,854)	-9.1%
Transit System Funding - City of Corvallis	150,000	150,000	-	-
Transit System Funding - City of Albany	-	34,700	34,700	-
Subtotal	**10,014,107**	**9,041,253**	**(972,854)**	**-9.7%**
Distributions to Academic Units				
Business	-	70,000	70,000	-
Forestry	-	120,000	120,000	-
Health and Human Sciences	-	318,000	318,000	-
Oceanic and Atmospheric Sciences	-	350,000	350,000	-
Liberal Arts	60,000	60,000	-	-
Science	75,000	75,000	-	-
Veterinary Medicine	213,000	-	(213,000)	-
Ecampus transfer of fund balance	-	(800,000)	(800,000)	-
Research Centers and Institutes	-	698,975	698,975	-
Instr Equipment & Technology Resource Fund (TRF)	5,280,000	5,584,380	304,380	5.8%
Subtotal	**5,628,000**	**6,476,355**	**848,355**	**15.1%**
Distributions to Administrative Units				
Facilities	-	3,300,000	3,300,000	-
Office of the President	30,000	140,000	110,000	366.7%
Business Center Transition	-	150,000	150,000	-
Finance and Administration	-	58,000	58,000	-
Provost	134,200	100,000	(34,200)	-25.5%
Athletics		350,000	350,000	-
Academic Affairs	50,000	-	(50,000)	-
Student Affairs	700,000	717,500	17,500	2.5%
Information Services	42,849	80,000	37,151	-
Subtotal	**957,049**	**4,895,500**	**3,938,451**	**411.5%**
Total Centrally Managed Funds	**$ 22,794,202**	**$ 29,711,259**	**$ 6,917,057**	**30.3%**

	OREGON STATE UNIVERSITY 2008-09 INITIAL BUDGET	Base Budget	Legislatively Targeted Prog & Contractual Oblig	Extended Campus	Summer Session	Student Fees Sales & Service	Grad Fee Remissions	ICR	Rebasing	FY09 Initial Budget	Centrally Administered Funding	Total Adjusted Budget for FY09	
	Centrally Administered Funds:	A	B	C	D	E	F	G	I	J	K	L	
1	Pools and Reserves	-	$ 14,669,968	-	-	$ 5,584,380	$ 538,164	$ 813,370	(901,176)	$ 20,704,706	$ (6,772,175)	$ 13,932,531	1
2	Transfers to Agencies Outside OSU E&G Budget	-	6,906,553	-	-	-	2,100,000		-	9,006,553	-	9,006,553	2
	Direct Instruction & Research Delivery:												
3	Agricultural Sciences	6,102,244	279,237	-	180,527	278,000	303,804	1,250,000	-	8,393,812	-	8,393,812	3
4	Business	6,145,753	247,462	-	182,501	1,125,000	80,352	3,500	150,000	7,934,568	70,000	8,004,568	4
5	Engineering	12,427,669	10,070,643	-	207,970	3,580,200	1,456,380	1,030,000	-	28,772,862		28,772,862	5
6	Forestry	1,967,788	435,081	-	118,643	87,000	153,468	490,000	-	3,251,980	120,000	3,371,980	6
7	Health & Human Sciences	8,670,420	112,879	-	472,744	1,152,000	760,104	578,000	400,000	12,146,147	318,000	12,464,147	7
8	Education	2,024,937	-	-	301,633	165,000	187,920	15,000	-	2,694,490		2,694,490	8
9	Liberal Arts	18,868,260	332,709	-	819,530	761,000	961,524	7,500	300,000	22,050,523	60,000	22,110,523	9
10	Oceanic & Atmospheric Sciences	3,435,380	799,657	-	28,275	38,250	65,772	2,400,000	-	6,767,334	350,000	7,117,334	10
11	Pharmacy	5,537,902	653,100	-	31,022	54,000	156,600	100,000	-	6,532,624		6,532,624	11
12	Science	22,199,368	226,197	-	1,343,765	744,500	2,048,328	877,500	400,000	27,839,658	75,000	27,914,658	12
13	Veterinary Medicine	8,359,954	3,440,236	-	-	5,000,018	28,188	110,000	-	16,938,396		16,938,396	13
14	Summer Session	-	-	-	751,104	-	-	-	-	751,104		751,104	14
15	University Honors College	960,268	-	-	1,949	350,500	9,396	-	-	1,322,113	-	1,322,113	15
16	Extended Campus	(245,670)	-	3,768,105	-	10,000	-	-	-	3,532,435	-	3,532,435	16
17	Extended Campus - Allocation to Depts	(681,103)	-	7,749,271	-	-	-		(93,824)	6,974,344	-	6,974,344	17
18	Extended Campus - Productivity Distribution	1,425,112		(478,837)						946,275		946,275	18
19	Building Use and Research Equipment	-	-	-	-	-	-	3,180,000	-	3,180,000	-	3,180,000	19
20	International Programs - OSU	1,302,300	-		15,059	224,460	-	-	-	1,541,819	-	1,541,819	20
21	International Programs - OUS	-	-	-	-	2,321,668	-		-	2,321,668	-	2,321,668	21
22	University Libraries	9,441,279	151,262	143,651		150,000	-	567,000	-	10,453,192	-	10,453,192	22
23	Research (Centers / Institutes / Programs)	4,855,516	846,055		6,466	359,500	-	1,805,130	-	7,872,667	698,975	8,571,642	23
24	Direct Instruction & Research Delivery Total	112,797,377	17,594,518	11,182,190	4,461,188	16,401,096	6,211,836	12,413,630	1,156,176	182,218,011	1,691,975	183,909,986	24
	Service, Support, and Management:												
25	Facilities Services	10,633,102	-	-	-	120,000	-	-	-	10,753,102		10,753,102	25
26	Utilities	8,687,559								8,687,559	3,300,000	11,987,559	26
27	Office of the President	2,455,222	744,460	-	-	1,500	-	-	-	3,201,182	140,000	3,341,182	27
28	University Advancement	2,453,636	20,000	-	-	-	-	-	-	2,473,636		2,473,636	28
29	University Business Centers	930,000								930,000		930,000	29
30	Finance and Administration	8,580,789	-	-	-	885,841	-	-	(255,000)	9,211,630	392,700	9,604,330	30
31	Graduate School	1,235,974	280,000	47,884	24,596	442,875	-	-	-	2,031,329		2,031,329	31
32	Research Administration	2,126,687	-	-	-	-	-	-	-	2,126,687		2,126,687	32
33	Provost	580,778	-	-	-	-	-	-	-	580,778		580,778	33
34	Provost - Pass-through	720,642	2,795,000	-	-	-	-	-	-	3,515,642	450,000	3,965,642	34
35	Academic Affairs	3,458,600	611,000	-	56,848	2,000	-	-	-	4,128,448		4,128,448	35
36	Student Affairs	6,081,664	46,471	143,651	-	3,326,661	-	-	-	9,598,447	717,500	10,315,947	36
37	Information Services	6,929,911	2,893,863	143,651	-	55,000	-	-	-	10,022,425	80,000	10,102,425	37
38	Service, Support, and Management Total	**54,874,564**	**7,390,794**	**335,186**	**81,444**	**4,833,877**	**-**	**-**	**(255,000)**	**67,260,865**	**5,080,200**	**72,341,065**	38
39	Total Educational and General Budget	**$ 167,671,941**	**$ 46,561,833**	**$ 11,517,376**	**$ 4,542,632**	**$ 26,819,353**	**$ 8,850,000**	**$ 13,227,000**	**$ -**	**$ 279,190,135**	**$ -**	**$ 279,190,135**	39

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Oregon State University
Base Budget Final
Fiscal Year 2009

	FY08			FY09	FY09			
Instruction & Research	Total Base	Budget Adj	Rebasing Adj	Beginning	Salary Funding	Utilities Cut	Adjustments	Total Base
Agricultural Sciences	5,576,603	270,406		5,847,009	273,208	(117,973)	100,000	6,102,244
Business	5,785,055	189,664	50,000	6,024,719	242,593	(121,559)		6,145,753
Engineering	11,864,570	381,332		12,245,902	428,848	(247,081)		12,427,669
Forestry	1,735,100	80,241		1,815,341	89,074	(36,627)	100,000	1,967,788
HHS	8,012,744	300,880	500,000	8,813,624	337,625	(177,829)	(303,000)	8,670,420
Education	1,497,777	456,230		1,954,007	110,355	(39,425)		2,024,937
Liberal Arts	17,561,190	657,423	300,000	18,518,613	723,290	(373,643)		18,868,260
Oceanic & Atmos. Sci.	3,190,351	149,800		3,340,151	162,622	(67,393)		3,435,380
Pharmacy	4,459,792	722,560		5,182,352	205,287	(104,562)	254,825	5,537,902
Science	20,780,087	678,915	400,000	21,859,002	781,406	(441,040)		22,199,368
Veterinary Medicine	6,318,057	1,999,946		8,318,003	280,175	(167,829)	(70,395)	8,359,954
Summer Session	-	-		-				-
University Honors College	(57,496)	1,012,552		955,056	24,482	(19,270)		960,268
Extended Campus	(235,408)	-		(235,408)		(10,262)		(245,670)
Extended Campus - Allocation to Depts			(681,103)	(681,103)				(681,103)
Extended Campus - Productivity Distribution	1,425,112	-		1,425,112				1,425,112
International Programs - OSU	1,068,748	190,163		1,258,911	68,790	(25,401)		1,302,300
University Libraries	8,892,429	502,530		9,394,959	235,879	(189,559)		9,441,279
Research (Centers / Institutes / Programs)	4,593,647	183,167		4,776,814	175,082	(96,380)		4,855,516
Instruction & Research Total	**102,468,358**	**7,775,809**	**568,897**	**110,813,064**	**4,138,716**	**(2,235,833)**	**81,430**	**112,797,377**
Service, Support, and Management:								
Facilities Services	17,687,385	1,336,660		19,024,045	420,457	(383,841)	260,000	19,320,661
Office of the President	1,975,638	285,596		2,261,234	89,612	(45,624)	150,000	2,455,222
University Advancement	2,380,254	114,969		2,495,223	82,270	(50,345)	(73,512)	2,453,636
University Business Centers							930,000	930,000
Finance and Administration	7,994,160	861,176	(330,000)	8,525,336	467,466	(172,013)	(240,000)	8,580,789
Graduate School	1,180,671	34,334		1,215,005	45,484	(24,515)		1,235,974
Research	1,279,602	790,992		2,070,594	97,871	(41,778)		2,126,687
Provost	550,657	18,894		569,551	22,719	(11,492)		580,778
Provost Pass-through	615,804	30,468		646,272	858		73,512	720,642
Academic Affairs	2,257,396	1,139,826		3,397,222	129,922	(68,544)		3,458,600
Student Affairs	7,011,860	(694,364)		6,317,496	231,634	(127,466)	(340,000)	6,081,664
Information Services	6,576,557	290,247		6,866,804	201,656	(138,549)		6,929,911
Service, Support, and Management Total	49,509,984	4,208,798	(330,000)	53,388,782	1,789,949	(1,064,167)	760,000	54,874,564
Total	**151,978,342**	**11,984,607**	**238,897**	**164,201,846**	**5,928,665**	**(3,300,000)**	**841,430**	**167,671,941**

Oregon State University

OSU - Targeted Programs

Fiscal Year 2009

Centrally Administered Funds	
Pools and Reserves	
Strategic Planning Reserve	$ 1,800,000
Contingency Fund	768,000
Graduate Costs Reserve	2,065,000
PEBB Reserve	600,000
Strategic IT Initiatives	500,000
Enrollment Reserve	232,000
Bad Debt Expense	600,000
INTO Investment Reserve	400,000
Ecampus - One time transfer to central pool	(800,000)
Budget Reserve	981,617
Rebasing support	901,176
Research Centers and Institutes	698,975
Forestry	120,000
Health and Human Sciences	318,000
Liberal Arts	60,000
Science	75,000
Oceanic and Atmospheric Sciences	350,000
Business	70,000
Facilities	3,300,000
Office of the President	140,000
University Advancement	80,000
Provost	100,000
Stdnt Affairs	717,500
Finance and Administration	208,000
Athletics	350,000
	14,635,268
Transfers to units & agencies outside OSU E&G Budget	
Assessments, Debt Service, Leases	4,221,553
Foundation Obligation	2,535,000
Transit System Funding - City of Corvallis	184,700
	6,941,253

Other	Endowment Match	Legislatively Targeted	OSU Targeted	Total
Agricultural Sciences	279,237	-	-	279,237
Business	152,097	95,365	-	247,462
Engineering	77,012	9,993,631	-	10,070,643
Forestry	435,081	-	-	435,081
Health & Human Sciences	112,879	-	-	112,879
Liberal Arts	332,709	-	-	332,709
Oceanic & Atmosph Sciences	19,657	180,000	600,000	799,657
Pharmacy	-	-	653,100	653,100
Science	226,197	-	-	226,197
Veterinary Medicine	-	3,114,036	326,200	3,440,236
University Libraries	110,727	40,535	-	151,262
Research Centers & Institutes	156,767	289,288	400,000	846,055
Office of the President	-	-	744,460	744,460
University Advancement	-	-	20,000	20,000
Graduate School	-	-	280,000	280,000
Provost Pass-Thru	-	-	2,795,000	2,795,000
Academic Affairs	-	-	611,000	611,000
Student Affairs	-	46,471	-	46,471
Information Services	-	2,893,863	-	2,893,863
	1,902,363	16,653,189	6,429,760	24,985,312

Total OSU Targeted Programs $46,561,833

Legislative Authorized Education and General Budget
Statewide Public Services and Cascades Campus

	State General Fund*	Other Funds	Total
Current Biennium - 2007-2009			
OSU - Cascades	$ 9,091,318	$ 2,398,289	$ 11,489,607
Agricultural Experiment Station	62,415,272	14,373,247	76,788,519
OSU Extension Service	45,158,836	25,573,409	70,732,245
Forest Research Laboratory	6,979,652	9,739,643	16,719,295
Total Legislative Authorized Budget (LAB)	$ 123,645,078	$ 52,084,588	$ 175,729,666
Prior Biennium - 2005-2007			
OSU - Cascades	$ 6,712,992	$ 2,181,868	$ 8,894,860
Agricultural Experiment Station	51,860,395	16,399,999	68,260,394
OSU Extension Service	37,194,367	22,838,785	60,033,152
Forest Research Laboratory	5,258,370	9,760,398	15,018,768
Total Legislative Authorized Budget (LAB)	$ 101,026,124	$ 51,181,050	$ 152,207,174

* Excludes Compensation funding delivered mid-biennium

Oregon State University
Budgeted Operations by Unit
Fiscal Year 2009 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-FXxxxx		
Executive Office	$ 3,201,182	-	-	-	-	-	-	-	843,922	-	$ 4,045,104
University Advancement	2,473,636	-	-	-	-	700,000	-	-	231,872	-	3,405,508
Provost & Executive VP	1,596,420	-	-	-	-	-	-	-	40,060	-	1,636,480
Academic Affairs	4,128,448	-	-	-	-	-	-	6,640	89,718	144,672	4,369,478
University Libraries	10,453,192	-	-	-	-	268,240	-	190,000	1,203,868	231,522	12,346,822
Information Services	10,022,425	-	-	-	-	124,939	10,866,810	306,912	1,134,326	3,639	22,459,051
Graduate School	2,031,329	-	-	-	-	-	-	-	91,813	338,455	2,461,597
Extended Campus	11,453,054	-	-	-	-	227,465	-	-	278	14,365	11,695,162
Summer Session	751,104	-	-	-	-	-	-	-	-	-	751,104
OSU Extension Service	-	-	-	18,704,991	-	184,148	-	5,400	432,861	415,261	19,742,661
VP Research & Research Centers	9,999,354	-	-	750,868	-	2,659,363	1,405,814	261,000	2,032,025	17,422,344	34,530,768
Student Affairs	9,598,447	-	-	-	-	125,435	-	50,611,592	7,568,969	462,115	68,366,558
International Programs	3,863,487	-	-	-	-	3,571,469	-	-	23,519	593,942	8,052,417
University Honors College	1,322,113	-	-	-	-	-	-	-	14,405	-	1,336,518
Cascades Campus	-	6,056,383	-	-	-	-	-	168,358	2,559	95,880	6,323,180
Agricultural Sciences	8,393,812	-	32,401,639	10,626,120	-	5,457,151	-	540,325	1,459,929	35,525,382	94,404,358
Veterinary Medicine	16,938,396	-	798,699	-	-	-	479,182	-	625,550	2,221,654	21,063,481
Forestry	3,251,980	-	48,615	2,160,998	6,921,300	247,564	924,100	20,000	7,390,144	11,854,299	32,819,000
Liberal Arts	22,050,523	-	-	-	-	70,001	-	-	753,060	665,121	23,538,705
Science	27,839,658	-	-	-	-	112,502	208,500	-	1,571,303	18,688,300	48,420,263
Oceanic and Atmospheric Science	6,767,334	-	-	-	-	489,586	-	1,441	258,846	26,803,594	34,320,801
Business	7,934,568	-	-	-	-	1,427,317	-	-	933,851	66,535	10,362,271
Engineering	28,772,862	-	-	-	-	408,211	-	-	3,368,169	19,304,309	51,853,551
Education	2,694,490	-	-	4,252,798	-	-	-	-	103,683	1,408,995	8,459,966
Health and Human Sciences	12,146,147	-	322,557	2,749,702	-	1,686,952	-	164,100	567,689	11,919,967	29,557,114
Pharmacy	6,532,624	-	-	-	-	72,417	-	963,266	349,880	2,214,104	10,132,291
University Business Centers	930,000	-	-	-	-	-	-	-	-	-	930,000
Finance and Administration	9,211,630	-	-	-	-	-	7,460,154	1,634,187	5,891,804	-	24,197,775
Facilities	19,440,661	-	-	-	-	-	-	2,767,038	82,584	73,462	22,363,745
Athletics	2,500,000	-	-	-	-	-	-	26,560,880	16,574,730	-	45,635,610
Institutional Management	32,891,259	359,830	4,633,072	(3,641,852)	381,851	-	-	12,532,681	-	-	47,156,841
TOTAL	**$279,190,135**	**$6,416,213**	**$38,204,582**	**$35,603,625**	**$7,303,151**	**$17,832,760**	**$21,344,560**	**$96,733,820**	**$53,641,417**	**$150,467,918**	**$706,738,181**

Capital Budget - see p. 53

Oregon University System
Distribution of State General Fund
2007-2009

The allocation of the 2007-2009 General Fund budgets to the seven campuses and the Chancellor's Office have been made in accordance with Legislative directives, Board policies, and agreed upon principles and processes as expressed in the following guiding principles:

1. Compliance with the OUS Board's expectations, budget request justifications and progress toward Board's priorities;
2. Compliance with Legislative expectations and representations;
3. Equitable basis of distributing General Fund support among campuses;
4. Creation of incentives to serve added Oregon students;
5. Creation of incentives to improve retention, increase graduates, and improve student success;
6. Begin to renormalize the Resource Allocation Model (RAM) to comport with the following budget note by 2009-2011:

   > "The Subcommittee understands that beginning in the 2009-2011 biennium, the Department will distribute General Fund appropriated for Undergraduate and Graduate Cell funding in the Resource Allocation Model on the basis of actual fundable student FTE (full time equivalent) counts for the fiscal year of the distribution. This may include adjustments designed to settle up fiscal year allocations once final fundable student FTE counts are known" (Senate Bill 5515 OUS Legislative Operating Budget); and

7. Phase all campuses to a funding level as determined by the RAM over the next four years. Note: this will depend upon adequate funding from the Legislature in 2009-2011.

The recommended annual distributions of state General Fund through the OUS Resource Allocation Model (RAM) are developed to comply with Senate Bill 5515, the primary operating budget bill for OUS passed by the 2007 Legislative Assembly. Due to past fiscal pressures, the fundable student FTE used in the RAM was frozen at 2002-03 levels for undergraduate funding and 2001-02 for most graduate programs. As noted above, the 2007 Legislative Assembly instructed OUS to "renormalize" the RAM by distributing General Fund through the RAM based on actual fundable student FTE counts by the 2009-2011 biennium. The impacts of this directive are twofold: 1) campuses that have experienced enrollment growth and/or enrollment shifts from "low" to "high" cost programs since the freeze was implemented will receive larger allocations and 2) campuses that have experienced enrollment declines and/or enrollment shifts from "high" cost to "low" cost programs since the freeze was implemented will receive lesser allocations. Thus, as this transition begins it is important to recognize the differential impacts that this directive will have on respective campuses.

Because of these differential impacts, campuses will need to take compensating action to adapt to new funding levels, and because there is insufficient funding to make this transition to a fully renormalized RAM in one step, this budget begins the process to phase in funding for all fundable FTEs in two steps: the first in 2007-2009 and the second in 2009-2011. Taking the second step will be dependent upon sufficient state General Fund being provided to OUS in the 2009-2011 Legislative Session.

The enrollment growth policy package of $20.6 million received in 2007-2009 was not sufficient to completely renormalize the RAM in one biennium. As a result, OUS committed to allocating at least $10.3 million to past growth / changes and splitting the remainder of the policy package appropriation between increasing the cell values for all students / campuses and funding the projected 2007-2009 fundable enrollment growth. The phase-in calculations will be based on 50 percent of the actual values for both the unfunded growth / changes in fundable students between the year of the freeze and 2006-07 actual enrollment and the projected 2007-2009 fundable enrollments.

Funding for several targeted programs was also based upon enrollments, which were frozen at 2002-03 levels or rates that have not been adjusted in recent years. The algorithms to calculate these adjustments will also be phased in using a two biennia or 50 percent factor in each biennium assuming that there is sufficient funding provided in 2009-2011 to do so. In addition, the Vet Med phase-in subsidy will be phased out as funded enrollments and cell funding for veterinary medicine increases to replace this funding that was provided to assist OSU in implementing a four-year Vet Med program during the years RAM funding was frozen.

<u>Enrollment Driven General Fund Allocation Process:</u>

1. Determine the enrollment funding for each campus by segmenting enrollment into three discrete segments:

   - 2007-2009 enrollment floor based on 2005-2007 allocations, plus 2007-2009 Essential Budget Level (EBL) adjustments;
   - Enrollment changes from 2002-03 to 2006-07; and
   - Projected enrollment changes from 2006-07 to 2007-2009.

   a) To determine the 2007-2009 enrollment floor, we first add the 2005-2007 enrollment funding of $422.1 million to the:

      i. 2005-07 Tuition buydown distribution, $17.25 million;

      ii. 2005-07 Faculty recruitment and retention funding, $0.8 million;

      iii. 2005-2007 compensation increase funding, $25.0 million; and

      iv. 2007-09 EBL adjustments, $18.0 million.

      v. The outcome of this calculation yields $483.2 million as the 2007-2009 enrollment funding floor.

   b) To determine the enrollment changes from 2002-03 to 2006-07, we first derive 2007-2009 cell values using the 2007-2009 enrollment floor (as determined in 1.a. above) plus the savings from the Vet Med phase-in ($3.3 million) and, the additional cell funding to improve retention, reduced time to degree, and improve graduation rates as discussed below ($4.0 million). Then we multiply this derived 2007-2009 cell value by the fundable 2006-07 enrollment to determine the amount of the funding earned by each campus as a result of the change in fundable enrollment from 2002-03 to 2006-07. As this amount is more than we have available for RAM renormalization, we will need to phase this over two biennia; thus we multiply the derived adjustments, both positive and negative, by 50 percent.

   c) In order to improve the success of Oregon and Oregonians, more Oregonians must earn baccalaureate degrees. Universities will receive funding in 2007-2009 to improve retention of freshmen to the sophomore year, to reduce the time required for students to complete baccalaureate degrees, and to increase the

percentage of freshmen who attain such degrees within four to six years. To that end, a portion of the funding provided for enrollment ($4.0 million) and a portion of the funding provided for regional campuses ($3.5 million) must be used for efforts designed by campuses to attain these ends. Our purpose in establishing this funding mechanism for 2007-2009 is to provide the resources and incentives for campuses to develop and begin implementing plans that achieve improved retention and graduation rates. In future biennia, it is our intention to direct this funding to those campuses that show measurable improvement in retention and graduation.

d) Using the same 2007-2009 cell valuations as determined in 1.b. above, distribute $5.3 million to fund projected 2007-2009 enrollment growth.

   i. For campuses, growth in 2007-2009 is funded at 50 percent, subject to the settle-up process as described below.

   ii. For campuses that are projected to have enrollment reductions in 2007-2009, no negative adjustments will be made, however, adjustments will need to be made in 2009-2011, based on actual enrollments, in order to fully renormalize the RAM as directed by the aforementioned budget note.

   iii. These allocations will be subject to a settle-up process at the end of each year, thus we are creating an enrollment reserve of $423.7 thousand in the event that fundable enrollments exceed projections. However, we will not be able to allocate any funding for enrollment above the level of this reserve. The settle-up process is described in the next section titled "Adjustment to General Fund and OFL Allocations" (item 2 below)

e) Total campus enrollment funding is determined by adding the floor amount determined in 1.a. above to the following:

   i. The campuses' share of the 50 percent phased 2002-03 to 2006-07 enrollment adjustments (as discussed in 1.b. above);

   ii. The allocation to improve retention, graduation, and time to degree (1.c. above); and

   iii. The 2007-2009 enrollment growth funding funded at 50 percent, if any (1.d. above).

f) As noted above, enrollment-driven targeted programs also need to be adjusted in accordance with current enrollment distributions. Given that the Legislative funding provided for RAM renormalization in 2007-2009 will only be sufficient to fund 50 percent of the change in fundable enrollments from 2002-03 to 2006-07, all adjustments will be made at this 50 percent rate, with the remaining 50 percent adjustment to occur next biennium subject to adequate Legislative funding to do so.

   i. Small school support – inflate rate per FTE by 10.29 percent (for four years of no change) and multiply this amount by 7,500 FTE less projected 2007-2009 FTE enrollments and subtract 50 percent of this delta due to phasing;

   ii. Engineering technology and engineering graduate supplements – inflate rate by 10.29 percent and multiply times projected 2007-2009 enrollments, less 50 percent due to phasing;

iii. Collaborative Nursing – inflate rate by 10.29 percent and multiply by 2006-07 actual enrollments, less 50 percent for phasing.

g) As noted earlier, OSU received Vet Med program phase-in funding when they expanded this program during the period of the enrollment freeze (2003-2005). Thus, as more of their currently unfunded "fundable" enrollments are funded, this phase-in funding needs to be phased out on a proportional basis. This distribution assumes that Vet Med program phase-in funding is phased out at the same rate that previously unfunded "fundable" enrollments are phased in (funded); or 50 percent - (see 1.b. above);

Adjustment to General Fund and OFL Allocations:

The following are adjustments to the 2007-09 initial budget allocations:

1. Compensation Increase funding – the allocations include the State General fund salary distributions that were approved by the Legislative Emergency Board in June 2008: one-third of funding in 2007-08 and two-third in 2008-09. Funding was distributed based on each institution's share of salary expenses (classified and unclassified) in 2006-07 as modified by each institution's fund split.

2. 2007-08 Settle-up, reflected in the 2008-09 allocation – the adjustments are calculated as follows:

   a. The settle-up process for 2007-08 was based on the actual fundable FTE and the same cell values as were used in the initial budget. This resulted in a -$2,043,448 negative adjustments to the campuses.

   b. The settle-up for the enrollment driven targeted programs (small school subsidy, engineering technology undergraduates at OIT and graduate engineering students at OSU and PSU) was based on actual FTE for 2007-08 and the newly projected FTE for 2008-09. This resulted in a -$632,172 negative budget adjustment to the affected campuses (-$249,912 in 2007-08 and -$382,260 in 2008-09).

   c. The incentive funding was provided to improve retention rates of freshmen to sophomore levels for first-time freshmen and junior to senior levels for transfer students. This resulted in a positive one-time allocation of $1,455,250 to the participating campuses. Note: all incentives are one-time, non-recurring budget allocations.

   d. Additional incentive funds ($1,000 per FTE) were provided to campuses that have served added fundable students above budgeted levels in 2007-08. This resulted in a positive budget allocation of $263,000. Note: all incentives are one-time, non-recurring budget allocations.

3. 2008-09 GF allocation, including the aforementioned settle-up and incentive adjustments – the calculations are as followed:

   a. The 2008-09 fundable enrollments were adjusted based on the latest projected enrollment using the same cell values as were used in the initial allocation. This resulted in a negative adjustment of -$484,517.

   b. The net effect of the retention/enrollment incentives outlined above amounts to a negative adjustment of -$1,441,887. When this amount is combined with the initial enrollment reserve of $423,697, it leaves a combined amount of $1,865,584 available for re-distribution. This amount of funding will be held by the Chancellor's Office until January 2009, when it will be distributed in its

entirely to fund enrollment settle-up amounts and retention incentives based on the Fall 2008 actual enrollments and retention data.

4. OFL Allocations – the budget by campus reflects changes in the OFL allocation. The 2007-08 allocation indicated the actual expenditures and the 2008-09 allocation reflects the expenditure limitations distributed to campuses based on the 2008-09 estimated revenues.

Targeted Program Funding (General Fund)

The OUS Resource Allocation Model (RAM) is used to allocate state General Fund support through two mechanisms: 1) a *per-student FTE basis* that is funded through the cells, and 2) a *targeted program basis*.

Targeted Programs are primarily mission-based rather than enrollment-driven and make up approximately 27% of state funding for Education and General programs. Targeted programs are grouped according to function: Regional Support, Small School Support, Engineering, Research, Institutes/Programs, Statewide Public Services, Central Services and Other.

Distribution Guidelines Related to State General Fund

Targeted program funds are determined and distributed in accordance with a variety of approaches:

- **Legislative Actions or Statutory Changes** - Funds are distributed to targeted programs at the campuses in a manner consistent with the legislative authorization such as the establishment of the Climate Center, funding of policy packages such as the Health Professions Programs, and continued funding of various programs such as the Campus Public Service Programs.
- **Board Direction** – Funds are distributed to supplement or fully support a specific program or entity which supports the campus missions of research and public service and to support other strategic initiatives as well as the operation of the Chancellor's Office.
- **Enrollment Driven** – Four of the programs combine enrollment projections with established rates to determine the distributions to the campuses. These targeted programs include the small school adjustment, engineering technology for undergraduates, engineering for graduates, and the collaborative OUS Nursing programs.
- **Inflation Adjustment** – all previously funded targeted programs were inflated by 3.87 percent in accordance with the increased Essential Budget Level (EBL) funding.
- **Fiscal Year Split** – funding for the targeted programs is split 49 percent for 2007-08 and 51 percent for 2008-09 with the following exceptions:
    - ETIC and DPSST 50% in each year
    - Employee Compensation, Faculty Salary and Student Faculty Ratio 33.3% in
    - 2007-08 and 66.7% in 2008-09
    - Retrenchment (EOU & SOU) 100% in the first year
    - Climate Center 100% in the second year of the biennium

<u>Program Elimination</u>

- **Western Undergraduate Exchange Program Support (WUE)** The WUE program permits nonresident undergraduate students from participating states to enroll in selected OUS programs at tuition rates that are 150 percent of resident undergraduate rates. The enrollment-driven portion of the budget model did not provide state General Fund support for WUE students. This targeted program subsidized campuses for the lower level of nonresident tuition revenue. Support funding for the WUE subsidy was

eliminated in 2005-07 session. The program was phased out with an allocation to the campuses in 2005-06 and fully eliminated in 2006-07.

- **Fee Remission Equity** Funding for the program was eliminated in 2005-07 by the Legislature. The program was phased out with an allocation to the campuses in 2005-2006 and eliminated in 2006-2007.

Fundable FTE Student Enrollments

Previous to 2007-09 biennium, enrollment driven funding has been calculated by multiplying fundable student FTE (as described below) times cell funding by CIP code (described in section IV) Since the 2007-09 funding was not sufficient to completely renormalize the RAM, enrollment funding was determined by segmenting enrollment into three distinct segments.

- 2007-2009 enrollment floor based on 2005-2007 allocations, plus 2007-2009 Essential Budget Level (EBL) adjustments;
- Enrollment changes from 2002-03 to 2006-07; and
- Projected enrollment changes from 2006-07 to 2007-2009.

Fundable Student FTE in the Budget Model

- Oregon residents, as defined by the Board's residency policy. This includes students in the regular (fall, winter, spring) and extended terms (fundable continuing education and summer session).
- Ph.D. students
- All Eastern Oregon University students
- Students enrolled under the part-time fee policy (as per Academic Year Fee Book)
- Students enrolled under specific reciprocity agreements
    - Oregon / Northern California community colleges
    - Institutional reciprocity / exchange agreements approved by the Chancellor's Office
    - Oregon / Washington reciprocity–no new agreement has been made since the 1997-1999 biennium; however, one student already in the program will continue to be funded
- Residence classification of armed forces personnel (per OAR 580-010-0035)
- Residence classification of members of federally recognized Oregon tribes (per OAR 580-010-0037)
- Residence classification of non-citizens (per OAR 580-010-0040)
- Staff / qualifying family members / domestic partners in accordance with new staff fee policy
- Graduate teaching assistants
- Cooperating supervising teachers
- National Student Exchange students
- Senior Citizens
- WICHE graduate / professional (Law, Pharmacy, Veterinary Medicine) students

CALCULATION OF ANNUAL FTE FOR USE IN THE BUDGET MODEL

- Credit hours of fundable students as reported at the end of each term (note: FTE calculations are based on techniques used by OUS Institutional Research Services as verified by campuses)
- Course CIP codes (Classification of Instructional Programs) as defined by NCES (National Center for Education Statistics). Annual FTE is determined as follows:
    - Undergraduate = 45 credit hours
    - Master's and professional = 36 credit hours
    - Doctoral = 27 credit hours
- Categorized by level of student
    - Freshman/sophomore and non-admitted undergraduate status equates to lower division undergraduate
    - Junior/senior and post-baccalaureate non-graduate status equates to upper division undergraduate
    - Master's degree students and non-admitted graduates
    - Ph.D. students
    - Separate student counts for Law, Veterinary Medicine, and Pharmacy

Comparison of OUS RAM Distributions
07-08 and 08-09
(Percentage of Total RAM)

	07-08 RAM %	08-09 RAM %	Difference
Oregon State University	25.53%	24.08%	-1.5%
Statewide Public Service	13.69%	13.29%	-0.4%
OSU-Cascades	1.11%	1.05%	-0.1%
Subtotal	40.3%	38.4%	-1.9%
University of Oregon	18.50%	17.87%	-0.6%
Portland State University	18.60%	17.67%	-0.9%
Southern Oregon University	4.69%	4.19%	-0.5%
Oregon Institute of Technology	5.41%	4.78%	-0.6%
Eastern Oregon University	4.25%	3.91%	-0.3%
Western Oregon University	4.76%	4.75%	0.0%
Oregon University System	3.47%	8.42%	4.9%
Total	100.0%	100.0%	0.0%

2008-09 Cell Values

2008-09 cell values for the RAM are discounted at 64.7% for resident FTE to reflect available state funding.

CELL VALUE CALCULATION METHODOLOGY
2008-09 CELL VALUE

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

Fiscal Year	Annual Inflation †	Cell Value	Cell Value Discounted	Discount Rate
			(due to funding shortfalls)	
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%

***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. In 2001-2002 forward, the tuition freeze factor is included prior to the application of inflation and applicable discount rates.**
† - Annual inflation for the years from 1998-2006 were based on factor from Oregon Dept. of Admin. Services (DAS) CPI was used for 2007-08 at a rate of 2.7% (June 2007 CPI annual increase)

2008-09 CELL VALUES AT 100%

	Lower Division Undergraduate	Upper Division Undergraduate	Master's Graduate	PhD Graduate
Level 1	$3,882	$4,998	$6,321	$11,898
Level 2	$4,874	$6,237	$8,552	$14,253
Level 3	$6,981	$9,460	$12,270	$17,971
Pharmacy	$10,575	$10,575	$16,112	$33,463
Law	-	-	$13,509	$11,898
Vet Med	-	-	$47,096	-

2008-09 ESTABLISHED CELL VALUES DISCOUNTED AT 64.7%

(ENROLLMENT DRIVEN REVENUE CALCULATION FOR STATE FUNDS)

	Lower Division Undergraduate	Upper Division Undergraduate	Master's Graduate	PhD Graduate
Level 1	$2,513	$3,235	$4,091	$7,701
Level 2	$3,155	$4,037	$5,535	$9,225
Level 3	$4,518	$6,122	$7,941	$11,631
Pharmacy	$6,844	$6,844	$10,428	$21,658
Law	-	-	$8,743	$7,701
Vet Med	-	-	$30,482	-

Oregon University System Cell Matrix Assignment

Classification of Instructional Programs	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

Oregon State University
Comparison of 07-08 Actual and 08-09 State Appropriations

	07-08 RAM	08-09 RAM	Percent Change
Corvallis Campus			
Cell Funding	$ 74,667,972	$ 76,374,632	2.29%
Targeted Programs	21,943,404	22,658,178	3.26%
Vet Med Program Phase-in	1,614,138	1,680,022	4.08%
Sub-total	98,225,514	100,712,832	2.53%
Faculty Salaries	804,057	1,608,113	100.00%
Student Faculty ration	764,622	1,529,247	100.00%
Utilities	447,395	465,655	4.08%
Midyear Salary Pool Funding	1,697,280	3,355,825	97.72%
RAM total	101,938,868	107,671,672	5.62%
Cascades Campus	4,340,394	4,691,855	8.10%
Statewide Public Services (SWPS)			
Agricultural Experiment Station	29,335,745	32,325,142	10.19%
OSU Extension Service*	21,183,960	23,412,004	10.52%
Forest Research Lab	3,226,729	3,689,151	14.33%
SWPS total	53,746,434	59,426,297	10.57%
Corvallis, Cascades and SWPS totals	$ 160,025,696	$ 171,789,824	7.35%

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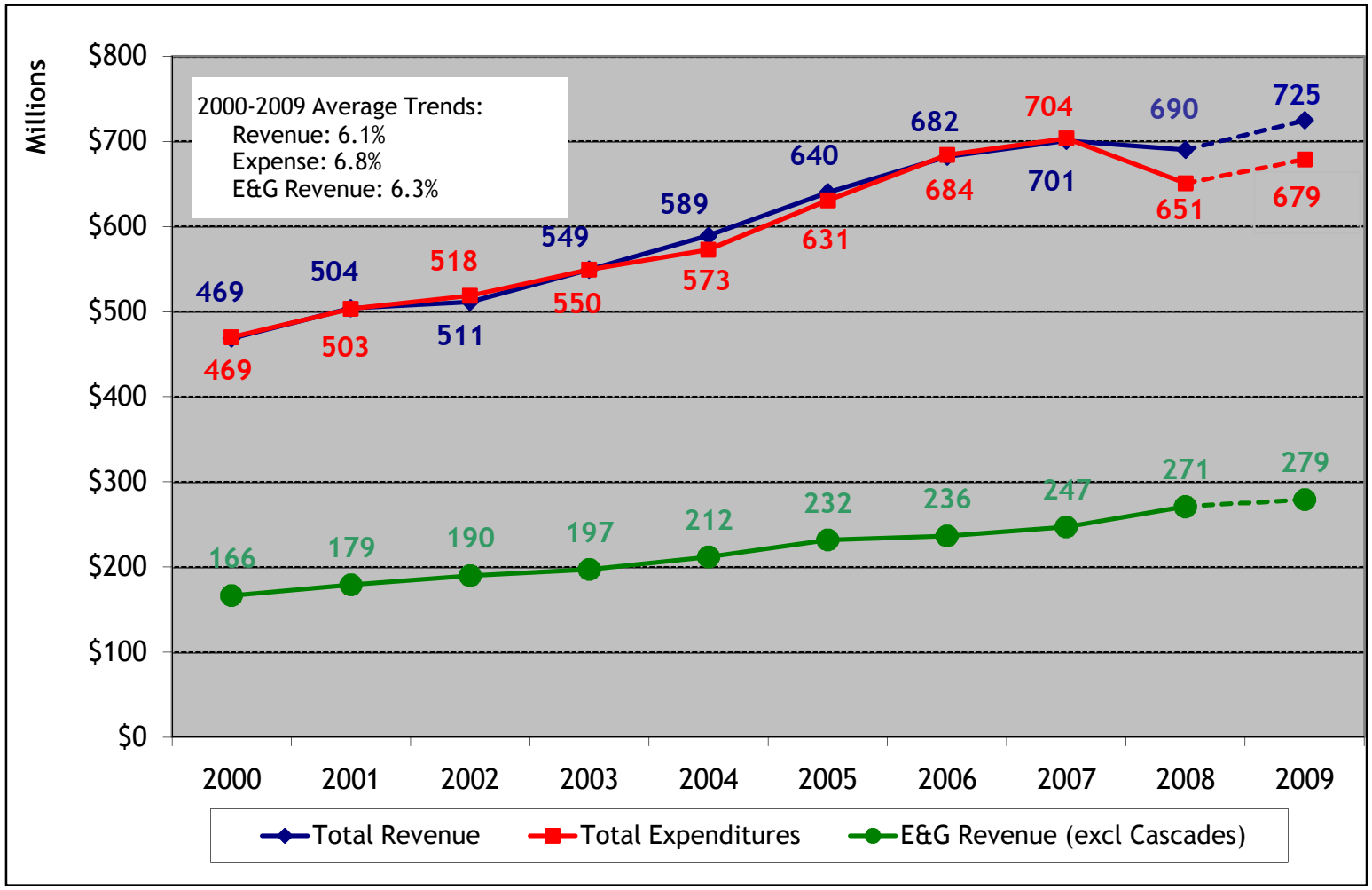
Oregon State University
Growth in Revenues and Expenditures
Fiscal Years 2000 - 2009

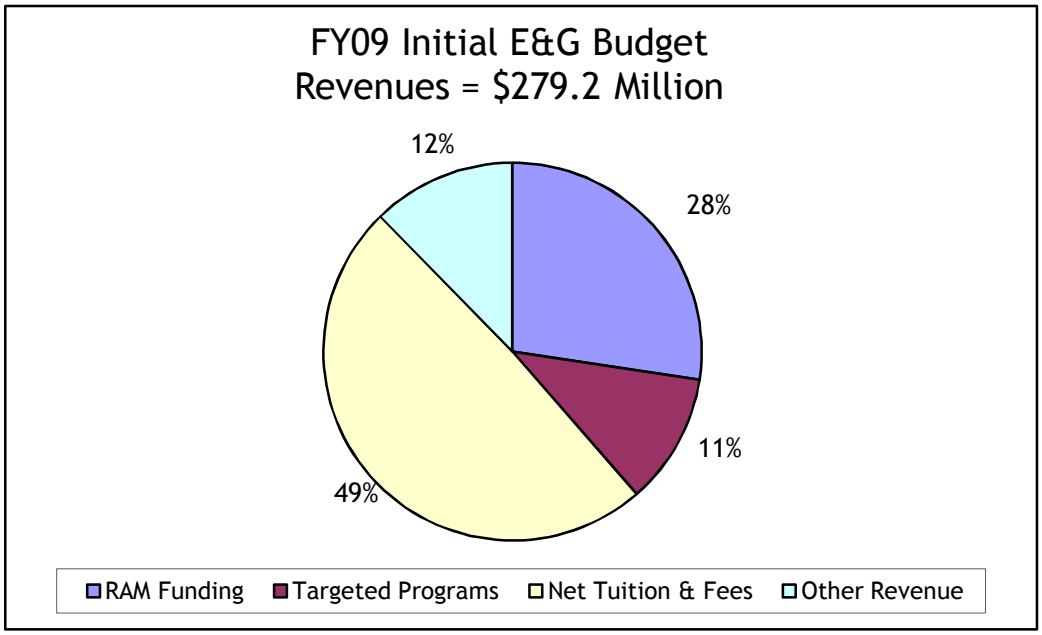


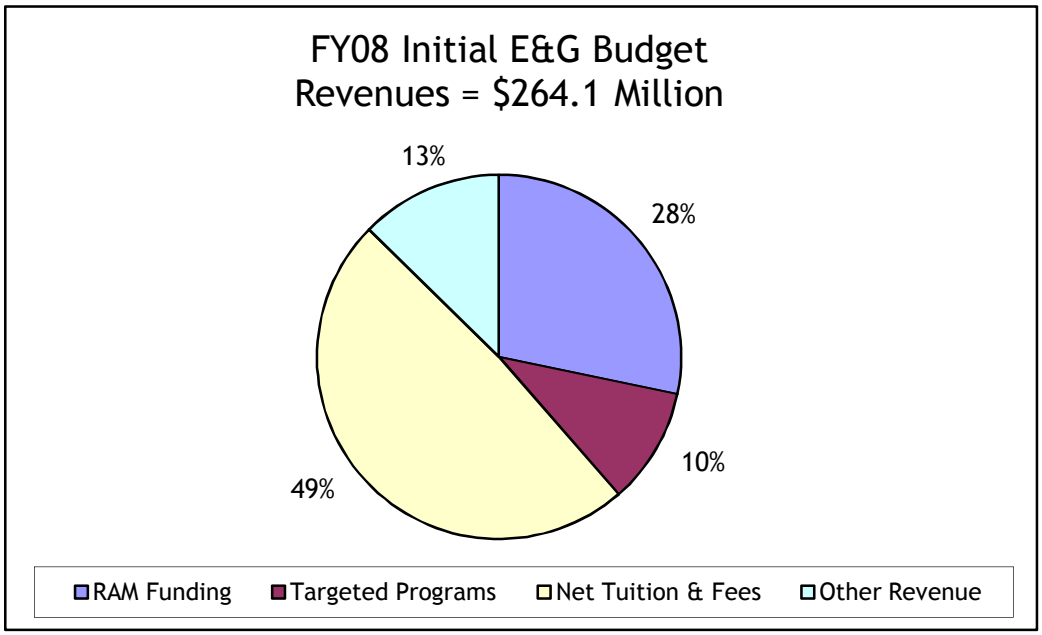
FY2002 - FY2009- Government Appropriations are included in Operating Revenue to be consistent with prior years.

FY2008 Total Revenue and Expense is trended.

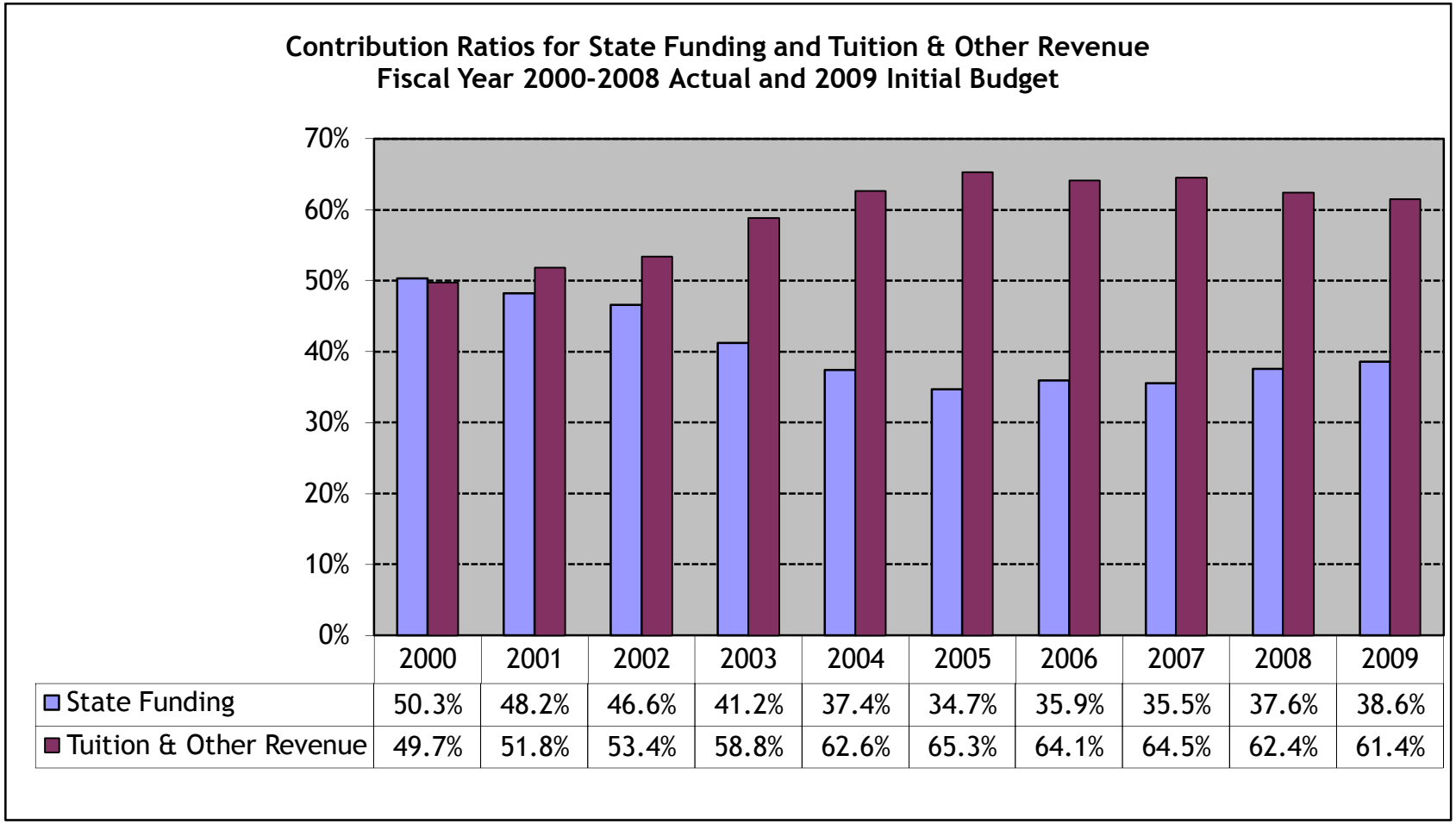
Source: Audited Financial Statements; FY09 E&G Initial Budget; OSU Data Warehouse.

Oregon State University
FY08 and FY09 E&G Revenue Sources





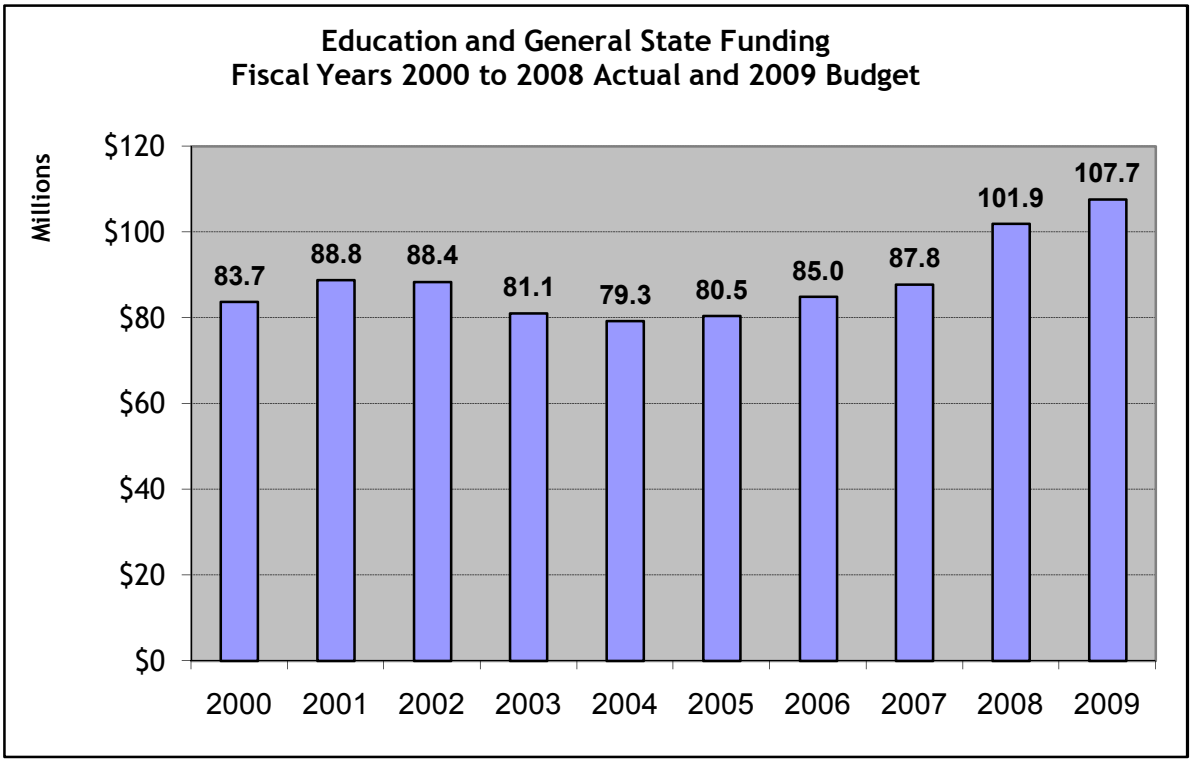
Oregon State University



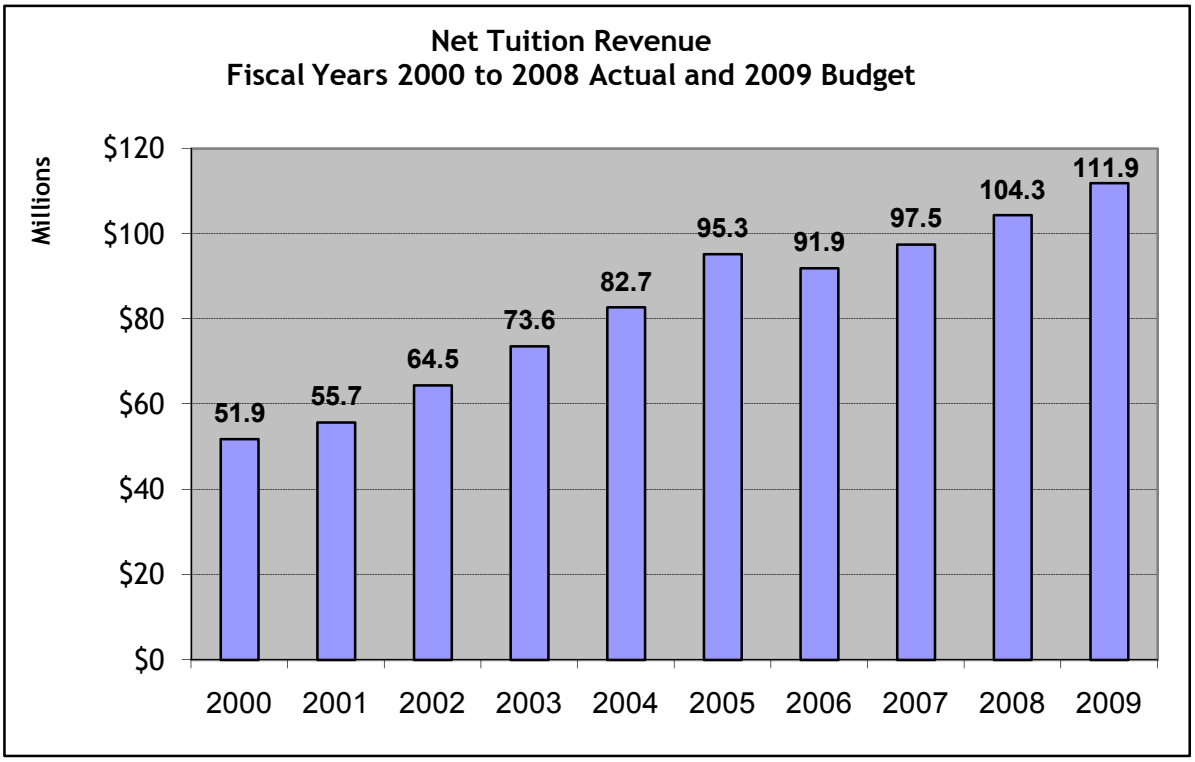
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
State Funding	50.3%	48.2%	46.6%	41.2%	37.4%	34.7%	35.9%	35.5%	37.6%	38.6%
Tuition & Other Revenue	49.7%	51.8%	53.4%	58.8%	62.6%	65.3%	64.1%	64.5%	62.4%	61.4%

Source: OSU Data Warehouse, FY09 E&G Initial Budget. Excludes Statewide Public Service and OSU-Cascades.

Oregon State University



Source: OSU Data Warehouse, FY09 E&G Initial Budget. Excludes Statewide Public Service and OSU-Cascades.



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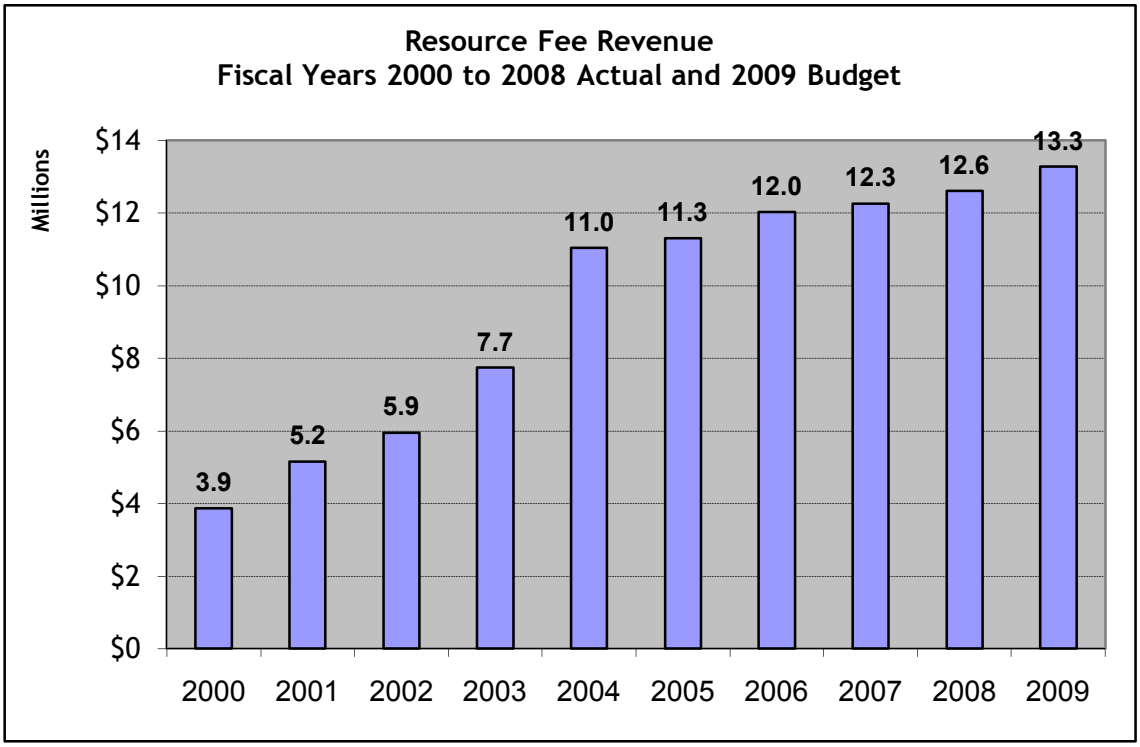
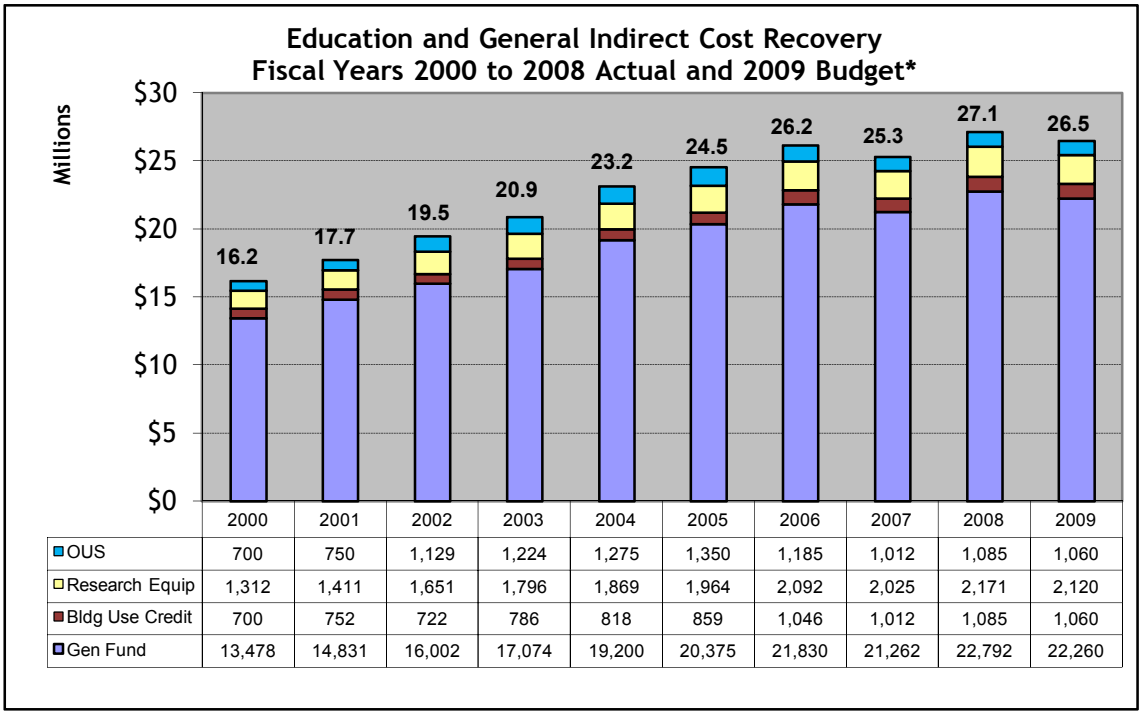
Oregon State University



Source: OSU Data Warehouse, FY09 E&G Initial Budget. Excludes Statewide Public Service and OSU-Cascades.



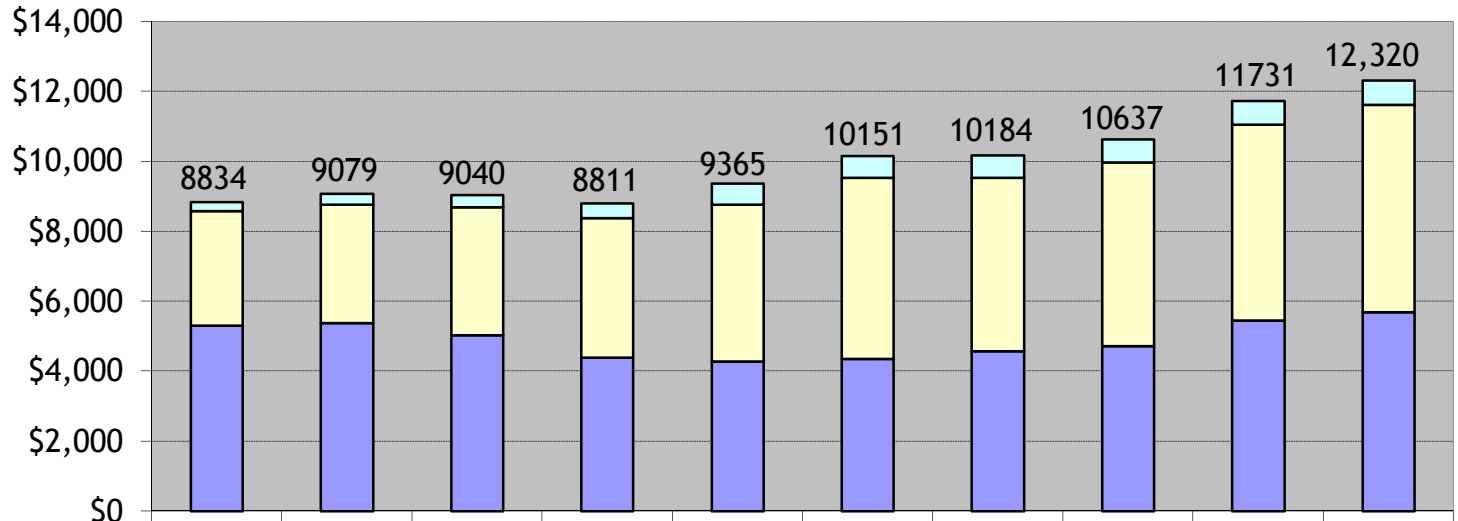
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
OUS	700	750	1,129	1,224	1,275	1,350	1,185	1,012	1,085	1,060
Research Equip	1,312	1,411	1,651	1,796	1,869	1,964	2,092	2,025	2,171	2,120
Bldg Use Credit	700	752	722	786	818	859	1,046	1,012	1,085	1,060
Gen Fund	13,478	14,831	16,002	17,074	19,200	20,375	21,830	21,262	22,792	22,260

*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, FY09 E&G Initial Budget. Excludes Statewide Public Service and OSU-Cascades.

Oregon State University

Revenues Per Student FTE
Education & General Fund (excluding ICR)
Fiscal Years 2000 to 2008 Actual and 2009 Initial Budget

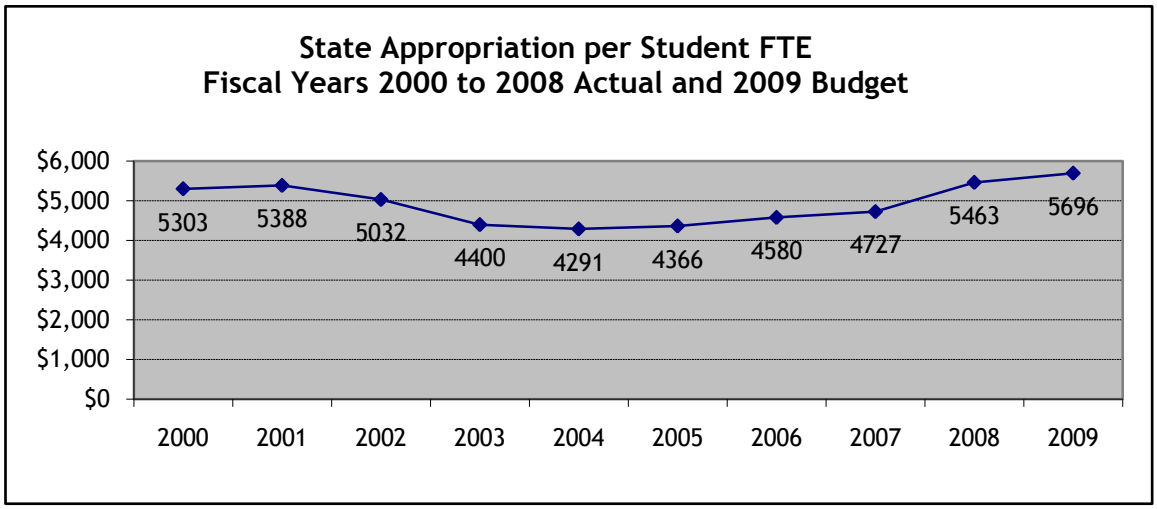


	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Resource Fees	245	313	338	420	597	614	648	660	676	702
Net Tuition*	3,286	3,378	3,670	3,991	4,477	5,171	4,956	5,250	5,592	5,921
State Funding	5,303	5,388	5,032	4,400	4,291	4,366	4,580	4,727	5,463	5,696

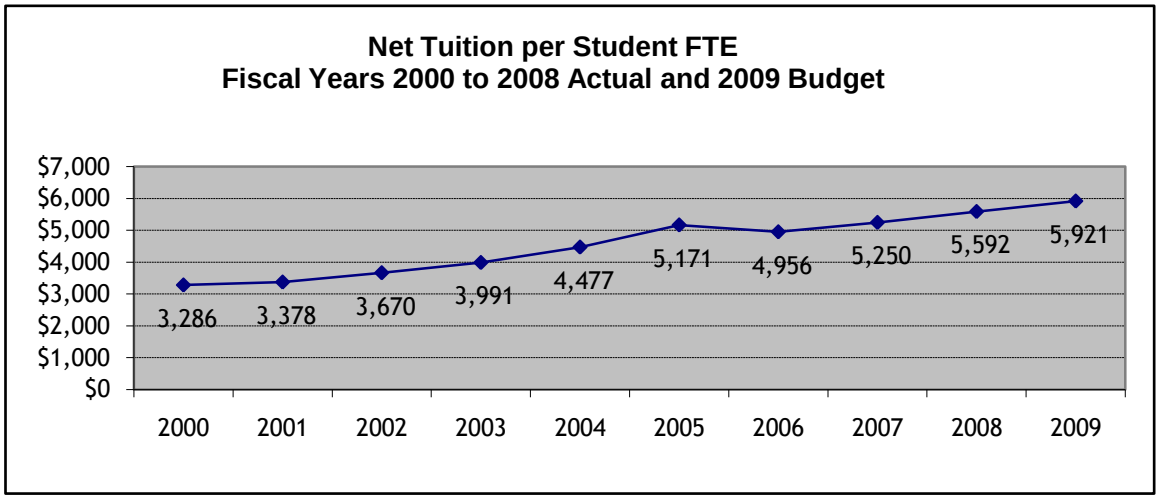
* Gross tuition revenue less remissions and increased scholarship in lieu of remissions budgeted in FY05

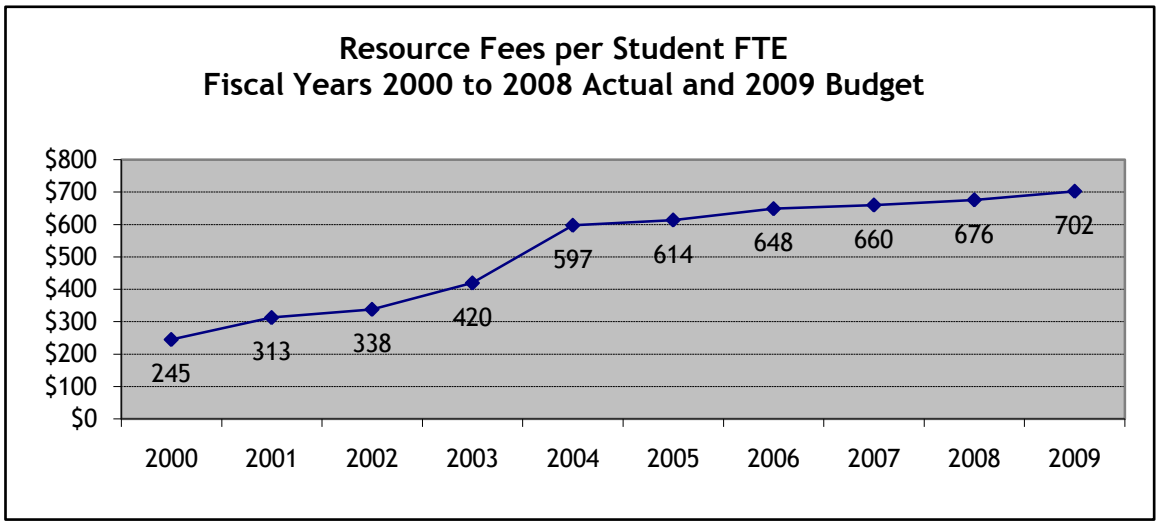
Source: OSU Data Warehouse, FY09 E&G Initial Budget. Excludes Statewide Public Service and OSU-Cascades.

Oregon State University



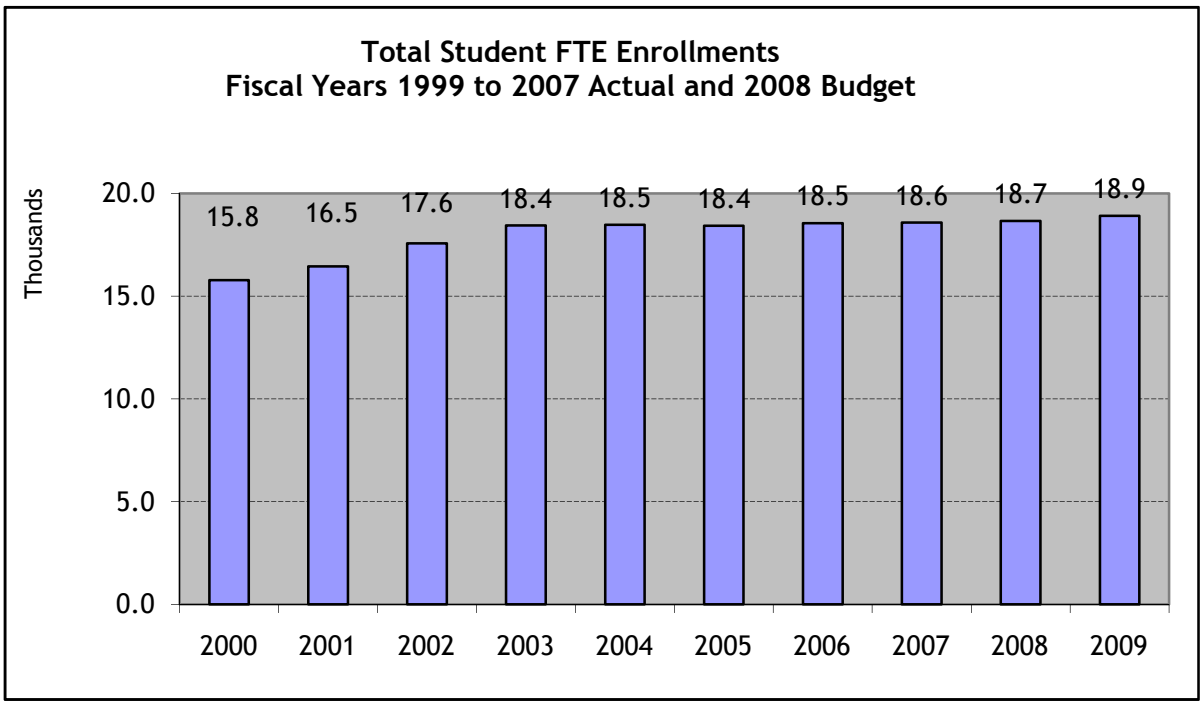
Includes state appropriations for Oregeon University System technology operations of $131, $133, and $131 per student in 2005, 2006, and 2007 respectively.





Source: OSU Data Warehouse, FY09 E&G Initial Budget. Excludes Statewide Public Service and OSU-Cascades.

Oregon State University



Source: Oregon University System Institutional Research

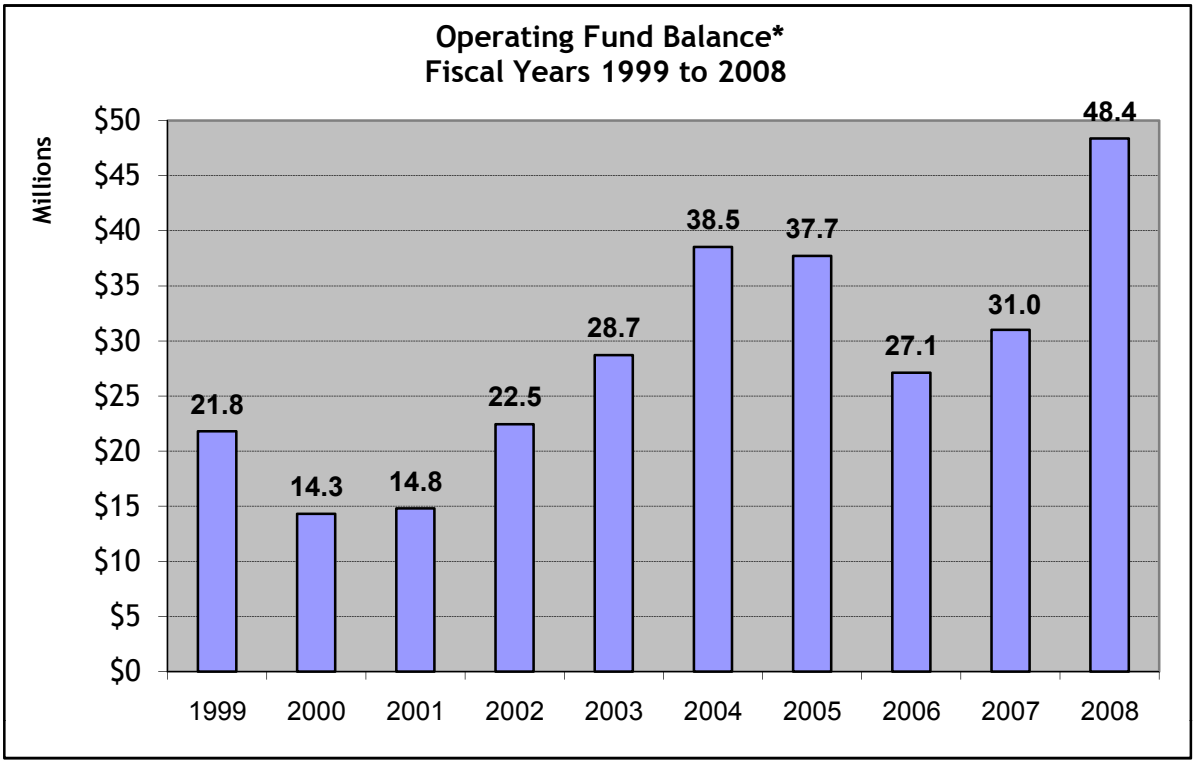
Oregon State University - Corvallis Campus
Student Head Count / FTE

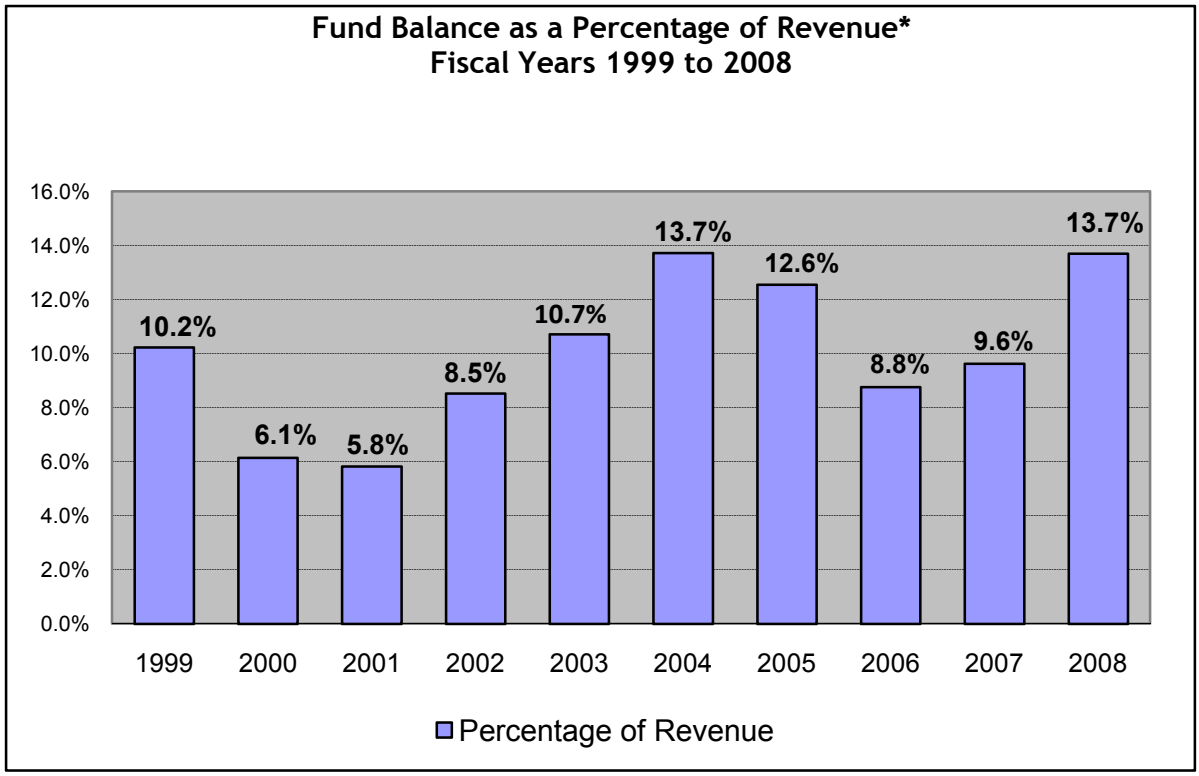
	HC[1]	FTE[2]
Undergraduate - Resident	13,926	12,772
Undergraduate - Non-resident	2,302	2,270
Graduate - Resident	1,834	2,336
Graduate - Non-resident	1,691	1,524
Total	19,753	18,902

[1] OSU Institutional Research Enrollment Summary Fall Term 2007 Data

[2] OUS budgeted number for Fiscal Year 2009

Oregon State University

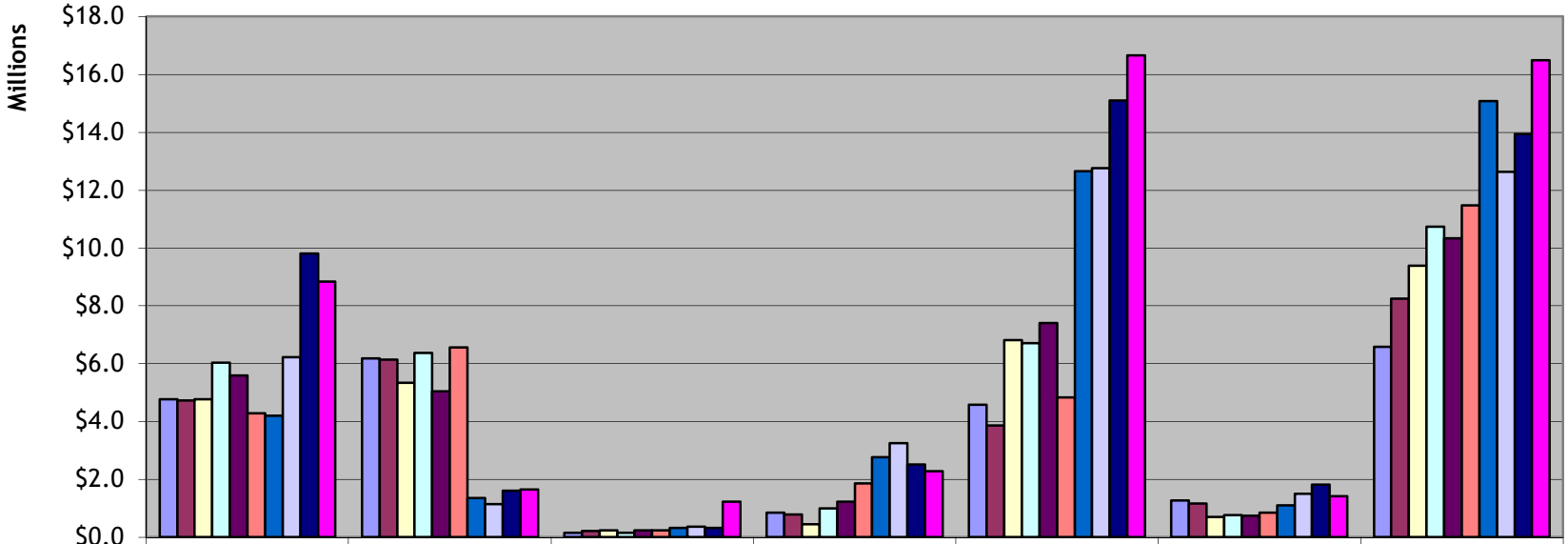




*Education and General Funds, Statewide Public Service and OSU-Cascades

OREGON STATE UNIVERSITY

Selected Gift Fund Expenditures 1999 - 2008

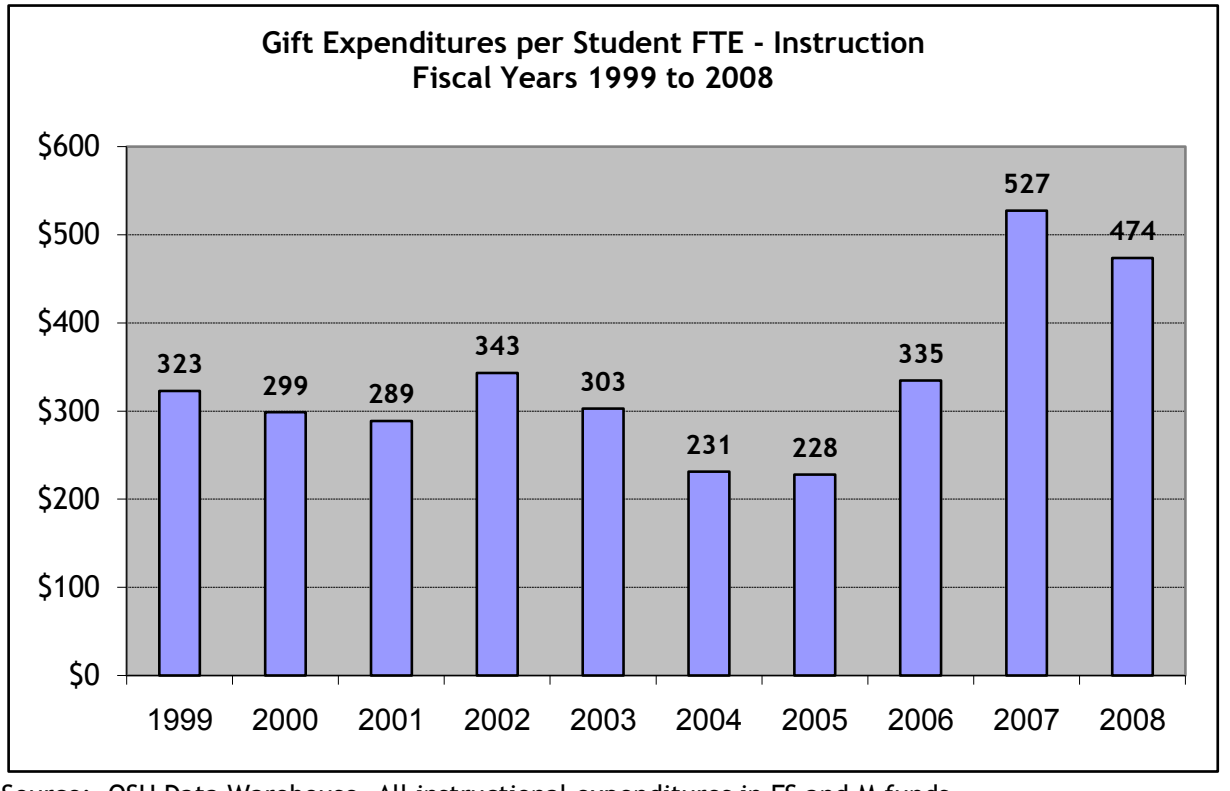


	Instruction	Research	Public Service	Academic Support	Student Services*	Institutional Management	Scholarships
1999	4.764	6.180	0.139	0.851	4.575	1.256	6.573
2000	4.712	6.142	0.211	0.785	3.847	1.163	8.236
2001	4.758	5.336	0.231	0.444	6.812	0.702	9.376
2002	6.029	6.363	0.157	0.995	6.706	0.763	10.720
2003	5.582	5.035	0.236	1.228	7.400	0.740	10.331
2004	4.274	6.545	0.227	1.859	4.819	0.841	11.476
2005	4.199	1.358	0.312	2.770	12.650	1.096	15.071
2006	6.211	1.129	0.365	3.250	12.750	1.489	12.633
2007	9.796	1.609	0.312	2.507	15.082	1.806	13.935
2008	8.838	1.651	1.216	2.277	16.642	1.411	16.479

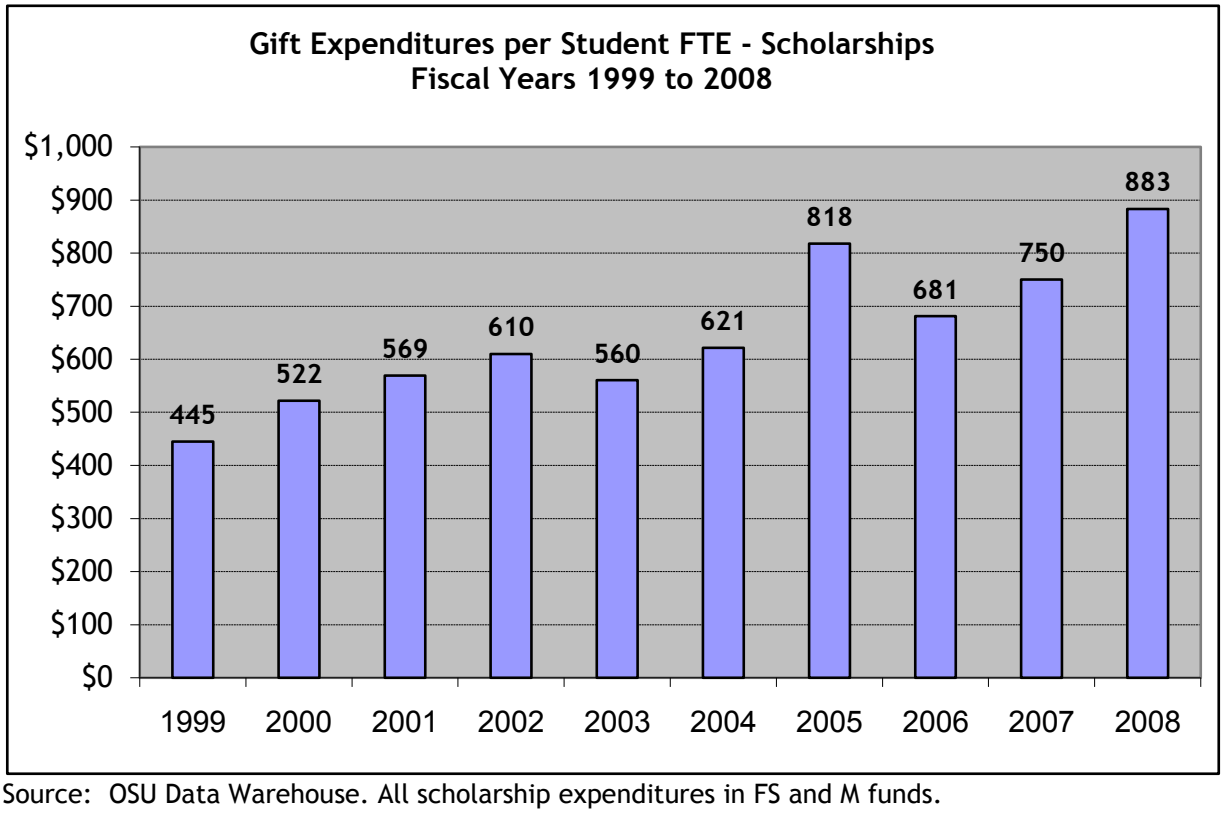
* 2005 and forward - Approximately $5 million is being transferred each year for debt service on Reser Stadium.

SOURCE: OSU Data Warehouse; excludes physical plant.

Oregon State University

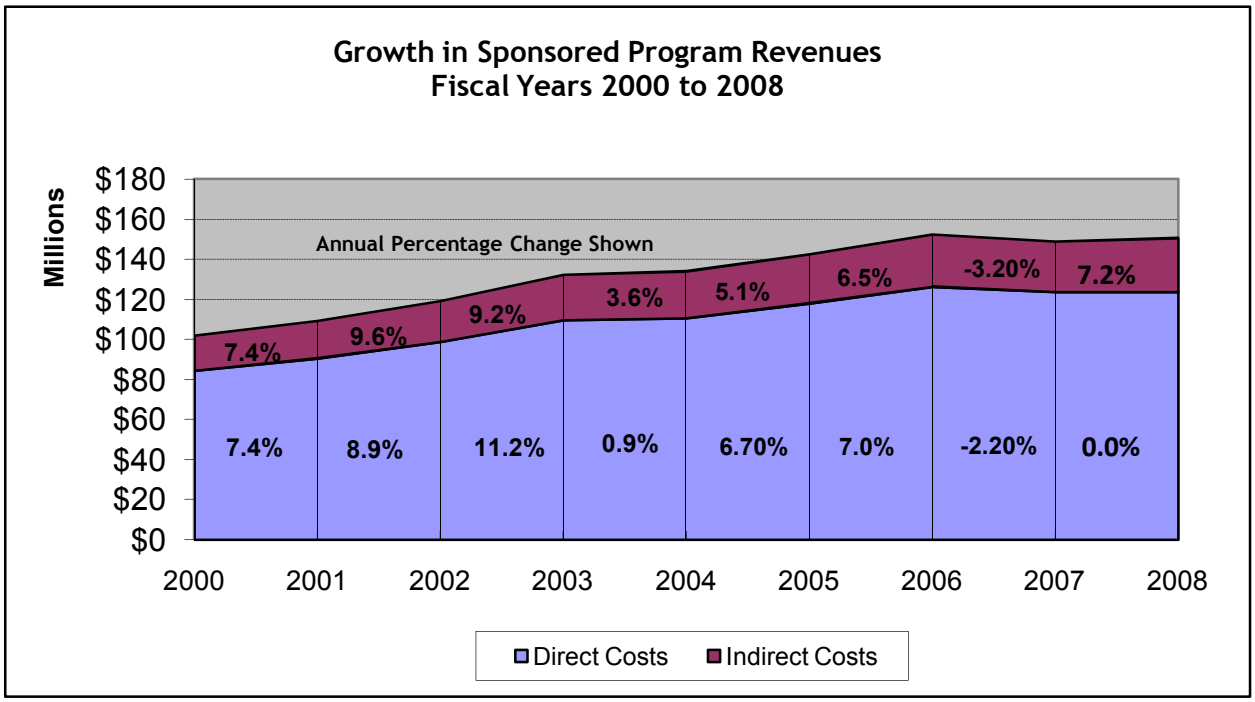


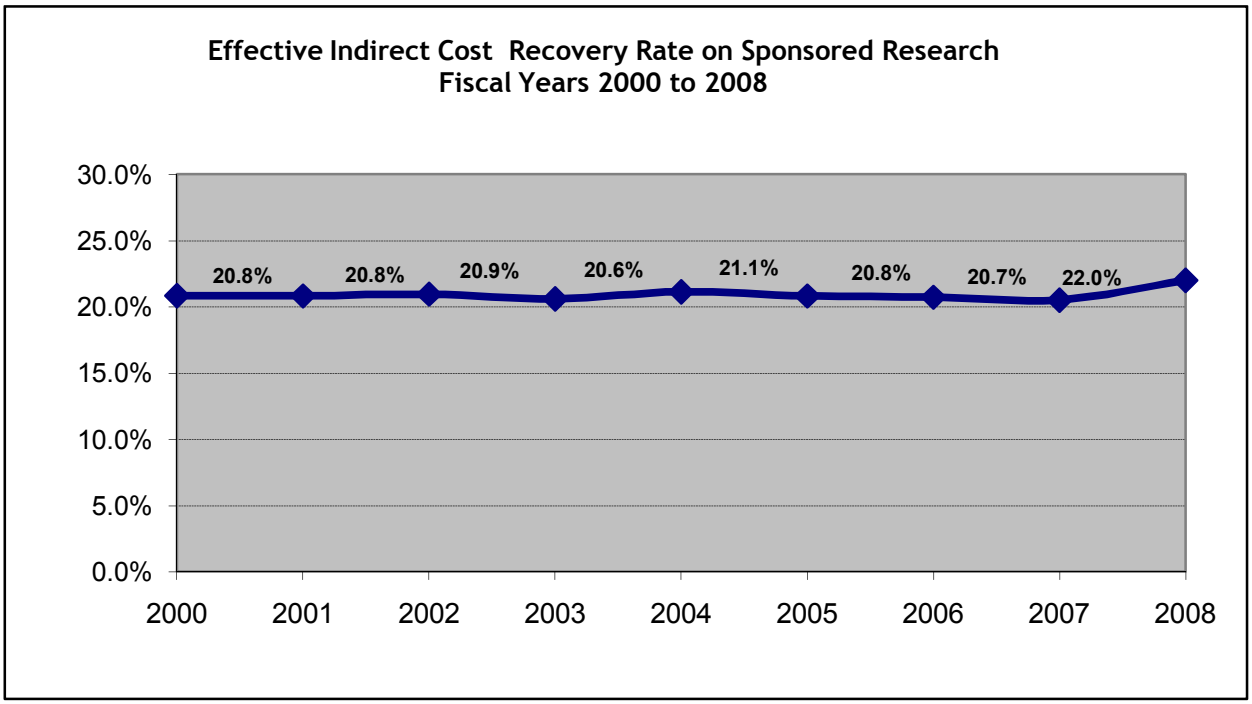
Source: OSU Data Warehouse. All instructional expenditures in FS and M funds.



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

Oregon State University





Source: OSU Data Warehouse

Research Awards Received (dollars in millions)						
FY2001-02	FY2002-03	FY2003-04	FY2004-05	FY2005-06	FY2006-07	FY2007-08
$127.3	$124.6	$146.7	$178.0	$151.4	$145.0	$164.2

Source: OSU Research Office

Oregon Colleges and Universities Cost of Attendance
Tuition & Fee/Room & Board Increases, FY2008-FY2009
Resident Undergraduates – Based Upon 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 $857, a 6.7% increase. For Oregon State University, there is a $918 increase, which is a 6.8% increase in the cost of attendance.

School	Total FY2008	Total FY2009	$ Change FY08-FY09	% Change FY08-FY09
EOU	13,242	14,343	1,101	8.3%
OIT	11,495	12,623	1,128	9.8%
OSU	13,477	14,395	918	6.8%
PSU	14,186	14,706	520	3.7%
SOU	13,095	14,043	948	7.2%
UO	14,058	14,547	489	3.5%
WOU	11,741	12,633	892	7.6%
Averages	**13,042**	**13,899**	**857**	**6.7%**

Oregon State University
Cost of Attendance Increase
Based Upon Tuition & Fees/Room & Board
FY2008-FY2009

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 FY08 to FY09 is $917.82 (6.8% increase). For out-of-state undergraduates, the increase in cost of attendance is $1,277.08 (5.0% increase).

In-State Undergraduate	Total 2007-08	Total 2008-09	$ Change FY08-FY09	% Change FY08-FY09
Tuition	4,464.00	4,608.00	144.00	3.2%
Fees	1,447.08	1,578.90	131.82	9.1%
Room & Board	7,566.00	8,208.00	642.00	8.5%
Total	13,477.08	14,394.90	917.82	6.8%
Out-of-State Undergraduate	**Total 2007-08**	**Total 2008-09**	**$ Change FY08-FY09**	**% Change FY08-FY09**
Tuition	16,740.00	17,244.00	504.00	3.0%
Fees	1,447.08	1,578.90	131.82	9.1%
Room & Board	7,566.00	8,208.00	642.00	8.5%
Total	25,753.08	27,030.90	1,277.08	5.0%

Comparison of Undergraduate Tuition, Room, and Board Rates
OSU Competitor Universities with Undergraduate Admissions Overlap
Fiscal Years 2008-2009

Total Tuition, Fees, Room & Board

Resident Undergraduate	2007-08	2008-09	% Change
Colorado State University	13,338	**13,942**	4.5%
Cornell University	30,300	**32,208**	6.3%
Iowa State University	12,877	**13,316**	3.4%
Michigan State University	14,642	**15,774**	7.7%
N. Carolina State University	12,487	**13,268**	6.3%
Ohio State University	15,933	**16,257**	2.0%
Pennsylvania State University	20,024	**21,220**	6.0%
Purdue University	14,946	**15,406**	3.1%
Oregon State University	13,477	**14,395**	6.8%
Texas A&M University	14,995	**16,324**	8.9%
University of Arizona	12,616	**13,354**	5.8%
UC Davis	19,642	**20,613**	4.9%
University of Illinois	18,699	**21,004**	12.3%
University of Wisconsin	16,382	**18,230**	11.3%

Nonresident Undergraduate	2007-08	2008-09	% Change
Colorado State University	26,778	**29,658**	10.8%
Cornell University	44,690	**47,048**	5.3%
Iowa State University	23,635	**24,306**	2.8%
Michigan State University	25,670	**28,140**	9.6%
N. Carolina State University	24,685	**25,566**	3.6%
Ohio State University	28,542	**28,866**	1.1%
Pennsylvania State University	30,892	**32,408**	4.9%
Purdue University	29,754	**30,880**	3.8%
Oregon State University	25,754	**27,031**	5.0%
Texas A&M University	23,335	**23,188**	-0.6%
University of Arizona	22,822	**26,488**	16%
UC Davis	38,710	**42,070**	8.7%
University of Illinois	32,092	**34,788**	8.4%
University of Wisconsin	29,012	**33,500**	15.5%

Tuition and Fees

Resident Undergraduate	2007-08	2008-09	% Change
Colorado State University	5,418	**5,814**	7.3%
Cornell University	19,110	**20,568**	7.6%
Iowa State University	6,161	**6,360**	3.2%
Michigan State University	8,070	**8,398**	4.1%
N. Carolina State University	5,117	**5,286**	3.3%
Ohio State University	8,568	**8,676**	1.3%
Pennsylvania State University	12,844	**13,520**	5.3%
Purdue University	7,416	**7,476**	0.8%
Oregon State University	5,911	**6,187**	4.7%
Texas A&M University	7,335	**8,324**	13.5%
University of Arizona	4,766	**5,542**	16.3%
UC Davis	8,109	**8,635**	6.5%
University of Illinois	10,503	**12,240**	16.5%
University of Wisconsin	8,808	**9,980**	13.3%

Nonresident Undergraduate	2007-08	2008-09	% Change
Colorado State University	18,858	**21,530**	14.2%
Cornell University	33,500	**35,408**	5.7%
Iowa State University	16,919	**17,350**	2.5%
Michigan State University	19,098	**20,764**	8.7%
N. Carolina State University	17,315	**17,584**	1.6%
Ohio State University	21,177	**21,285**	0.5%
Pennsylvania State University	23,712	**24,708**	4.2%
Purdue University	22,224	**22,950**	3.3%
Oregon State University	18,187	**18,823**	3.5%
Texas A&M University	15,675	**15,188**	-3.1%
University of Arizona	14,972	**18,676**	24.7%
UC Davis	27,177	**30,092**	10.7%
University of Illinois	23,896	**26,024**	8.9%
University of Wisconsin	21,438	**25,250**	17.8%

Room & Board Rates

	2007-08	2008-09	% Change
Colorado State University	7,920	**8,128**	2.6%
Cornell University	11,190	**11,640**	4.0%
Iowa State University	6,716	**6,956**	3.6%
Michigan State University	6,572	**7,376**	12.2%
N. Carolina State University	7,370	**7,982**	8.3%
Ohio State University	7,365	**7,581**	2.9%
Pennsylvania State University	7,180	**7,700**	7.2%
Purdue University	7,530	**7,930**	5.3%
Oregon State University	7,566	**8,208**	8.5%
Texas A&M University	7,660	**8,000**	4.4%
University of Arizona	7,850	**7,812**	-0.5%
UC Davis	11,533	**11,978**	3.9%
University of Illinois	8,196	**8,764**	6.9%
University of Wisconsin	7,574	**8,250**	8.9%

Source: Institutional websites

SURVEY OF PEER UNIVERSITIES – UO, OSU, and PSU

2008-2009 Annual Tuition and Fees Comparison

Selected Western States Peers

Western States Institutions	Resident Undergraduate	Nonres Undergrad	Resident Graduate	Nonres Graduate
University of Oregon	6,435	18,117	12,144	19,992
Oregon State University	**6,187**	**18,823**	**10,975**	**16,807**
Portland State University	6,147	15,318	11,262	18,837
University of Utah	4,453	13,909	5,287	16,798
University of Hawaii Manoa	6,258	16,914	8,222	19,262
University of New Mexico	4,834	15,708	5,256	16,096
University of Alaska Fairbanks	4,812	12,348	8,616	16,152
University of Idaho	4,632	14,712	5,212	15,292
University of Alaska Southeast	3,420	10,956	7,224	14,760
Utah State University	4,022	11,892	4,746	15,080
University of Nevada Reno	3,304	14,114	4,642	15,452
University of Wyoming	2,846	8,774	4,766	12,542
Average of Western States Comparators without Oregon	**4,286**	**13,258**	**5,997**	**15,714**
UO % of Average	132.7%	136.7%	202.5%	109.2%
OSU % of Average	**144.4%**	**141.9%**	**183.0%**	**107.0%**
PSU % of Average	120.5%	115.5%	187.8%	107.5%

Sources: Oregon State Board of Higher Education OUS 2008-2009 Academic Fee Book, Institutional websites

Oregon State University – Corvallis Campus
2008-09 Academic Year Tuition and Required Fees – Per Term

Credit Hours	Undergraduate Tuition Residents	Undergraduate Tuition Non-Residents	FEES Tech-nology	FEES Building	FEES Incidental	FEES Health Service	FEES Registra-tion	Total Fees	Total Fees + Tuition Residents	Total Fees + Tuition Non-Residents
1	128.00	479.00	17.00	23.00	185.11	125.19	11.00	361.30	489.30	840.30
2	256.00	958.00	25.00	25.00	190.11	125.19	11.00	376.30	632.30	1,334.30
3	384.00	1,437.00	33.00	27.00	195.11	125.19	11.00	391.30	775.30	1,828.30
4	512.00	1,916.00	41.00	29.00	200.11	125.19	11.00	406.30	918.30	2,322.30
5	640.00	2,395.00	49.00	31.00	205.11	125.19	11.00	421.30	1,061.30	2,816.30
6	768.00	2,874.00	57.00	33.00	210.11	125.19	11.00	436.30	1,204.30	3,310.30
7	896.00	3,353.00	65.00	35.00	215.11	125.19	11.00	451.30	1,347.30	3,804.30
8	1,024.00	3,832.00	73.00	37.00	220.11	125.19	11.00	466.30	1,490.30	4,298.30
9	1,152.00	4,311.00	81.00	39.00	225.11	125.19	11.00	481.30	1,633.30	4,792.30
10	1,280.00	4,790.00	89.00	41.00	230.11	125.19	11.00	496.30	1,776.30	5,286.30
11	1,408.00	5,269.00	97.00	43.00	235.11	125.19	11.00	511.30	1,919.30	5,780.30
12	1,536.00	5,748.00	105.00	45.00	240.11	125.19	11.00	526.30	2,062.30	6,274.30
13	1,536.00	5,748.00	105.00	45.00	240.11	125.19	11.00	526.30	2,062.30	6,274.30
14	1,536.00	5,748.00	105.00	45.00	240.11	125.19	11.00	526.30	2,062.30	6,274.30
15	1,536.00	5,748.00	105.00	45.00	240.11	125.19	11.00	526.30	2,062.30	6,274.30
16	1,536.00	5,748.00	105.00	45.00	240.11	125.19	11.00	526.30	2,062.30	6,274.30
17	1,664.00	6,227.00	105.00	45.00	240.11	125.19	11.00	526.30	2,190.30	6,753.30
18	1,792.00	6,706.00	105.00	45.00	240.11	125.19	11.00	526.30	2,318.30	7,232.30
19	1,920.00	7,185.00	105.00	45.00	240.11	125.19	11.00	526.30	2,446.30	7,711.30
20	2,048.00	7,664.00	105.00	45.00	240.11	125.19	11.00	526.30	2,574.30	8,190.30
21	2,176.00	8,143.00	105.00	45.00	240.11	125.19	11.00	526.30	2,702.30	8,669.30
22	2,304.00	8,622.00	105.00	45.00	240.11	125.19	11.00	526.30	2,830.30	9,148.30
23	2,432.00	9,101.00	105.00	45.00	240.11	125.19	11.00	526.30	2,958.30	9,627.30
24	2,560.00	9,580.00	105.00	45.00	240.11	125.19	11.00	526.30	3,086.30	10,106.30
25	2,688.00	10,059.00	105.00	45.00	240.11	125.19	11.00	526.30	3,214.30	10,585.30
Each Add'l Credit Hour	**128.00**	**479.00**								

Endnotes:

Oregon State University – Corvallis Campus
2008-09 Academic Year Tuition and Required Fees – Per Term

Credit Hours	Graduate Tuition Residents	Graduate Tuition Non-Residents	FEES Tech-nology	FEES Building	FEES Incidental	FEES Health Service	FEES Registra-tion	Total Fees	Total Fees + Tuition Residents	Total Fees + Tuition Non-Residents
1	348.00	564.00	17.00	23.00	192.11	125.19	11.00	368.30	716.30	932.30
2	696.00	1,128.00	28.00	26.00	198.11	125.19	11.00	388.30	1,084.30	1,516.30
3	1,044.00	1,692.00	39.00	29.00	204.11	125.19	11.00	408.30	1,452.30	2,100.30
4	1,392.00	2,256.00	50.00	32.00	210.11	125.19	11.00	428.30	1,820.30	2,684.30
5	1,740.00	2,820.00	61.00	35.00	216.11	125.19	11.00	448.30	2,188.30	3,268.30
6	2,088.00	3,384.00	72.00	38.00	222.11	125.19	11.00	468.30	2,556.30	3,852.30
7	2,436.00	3,948.00	83.00	41.00	228.11	125.19	11.00	488.30	2,924.30	4,436.30
8	2,784.00	4,512.00	94.00	43.00	234.11	125.19	11.00	507.30	3,291.30	5,019.30
9	3,132.00	5,076.00	105.00	45.00	240.11	125.19	11.00	526.30	3,658.30	5,602.30
10	3,132.00	5,076.00	105.00	45.00	240.11	125.19	11.00	526.30	3,658.30	5,602.30
11	3,132.00	5,076.00	105.00	45.00	240.11	125.19	11.00	526.30	3,658.30	5,602.30
12	3,132.00	5,076.00	105.00	45.00	240.11	125.19	11.00	526.30	3,658.30	5,602.30
13	3,132.00	5,076.00	105.00	45.00	240.11	125.19	11.00	526.30	3,658.30	5,602.30
14	3,132.00	5,076.00	105.00	45.00	240.11	125.19	11.00	526.30	3,658.30	5,602.30
15	3,132.00	5,076.00	105.00	45.00	240.11	125.19	11.00	526.30	3,658.30	5,602.30
16	3,132.00	5,076.00	105.00	45.00	240.11	125.19	11.00	526.30	3,658.30	5,602.30
Each Add'l Credit Hour	**348.00**	**564.00**								

Endnotes:

Oregon State University – Pharmacy Program
2008-09 Academic Year Tuition and Required Fees – Per Term

Students Admitted Fall 2005	Pharmacy		FEES						Total	Total
Credit Hours	Tuition Residents	Tuition Non-Residents	Tech-nology	Building	Incidental	Health Service	Registra-tion	Total Fees	Fees + Tuition Residents	Fees + Tuition Non-Residents
Full-Time										
12 or more Credit Hours	4,668.00	7,992.00	105.00	45.00	240.11	125.19	11.00	526.30	5,194.30	8,518.30
Part-Time (Degree Students)										
1	389.00	666.00	17.00	23.00	185.11	125.19	11.00	361.30	750.30	1,027.30
2	778.00	1,332.00	28.00	25.00	190.11	125.19	11.00	379.30	1,157.30	1,711.30
3	1,167.00	1,998.00	39.00	27.00	195.11	125.19	11.00	397.30	1,564.30	2,395.30
4	1,556.00	2,664.00	50.00	29.00	200.11	125.19	11.00	415.30	1,971.30	3,079.30
5	1,945.00	3,330.00	61.00	31.00	205.11	125.19	11.00	433.30	2,378.30	3,763.30
6	2,334.00	3,996.00	72.00	33.00	210.11	125.19	11.00	451.30	2,785.30	4,447.30
7	2,723.00	4,662.00	83.00	35.00	215.11	125.19	11.00	469.30	3,192.30	5,131.30
8	3,112.00	5,328.00	94.00	37.00	220.11	125.19	11.00	487.30	3,599.30	5,815.30
9	3,501.00	5,994.00	105.00	39.00	225.11	125.19	11.00	505.30	4,006.30	6,499.30
10	3,890.00	6,660.00	105.00	41.00	230.11	125.19	11.00	512.30	4,402.30	7,172.30
11	4,279.00	7,326.00	105.00	43.00	235.11	125.19	11.00	519.30	4,798.30	7,845.30

Students Admitted Fall 2006 or 2007	Pharmacy		FEES						Total	Total
Credit Hours	Tuition Residents	Tuition Non-Residents	Tech-nology	Building	Incidental	Health Service	Registra-tion	Total Fees	Fees + Tuition Residents	Fees + Tuition Non-Residents
Full-Time										
12 or more Credit Hours	5,064.00	8,400.00	105.00	45.00	240.11	125.19	11.00	526.30	5,590.30	8,926.30
Part-Time (Degree Students)										
1	422.00	700.00	17.00	23.00	185.11	125.19	11.00	361.30	783.30	1,061.30
2	844.00	1,400.00	28.00	25.00	190.11	125.19	11.00	379.30	1,223.30	1,779.30
3	1,266.00	2,100.00	39.00	27.00	195.11	125.19	11.00	397.30	1,663.30	2,497.30
4	1,688.00	2,800.00	50.00	29.00	200.11	125.19	11.00	415.30	2,103.30	3,215.30
5	2,110.00	3,500.00	61.00	31.00	205.11	125.19	11.00	433.30	2,543.30	3,933.30
6	2,532.00	4,200.00	72.00	33.00	210.11	125.19	11.00	451.30	2,983.30	4,651.30
7	2,954.00	4,900.00	83.00	35.00	215.11	125.19	11.00	469.30	3,423.30	5,369.30
8	3,376.00	5,600.00	94.00	37.00	220.11	125.19	11.00	487.30	3,863.30	6,087.30
9	3,798.00	6,300.00	105.00	39.00	225.11	125.19	11.00	505.30	4,303.30	6,805.30
10	4,220.00	7,000.00	105.00	41.00	230.11	125.19	11.00	512.30	4,732.30	7,512.30
11	4,642.00	7,700.00	105.00	43.00	235.11	125.19	11.00	519.30	5,161.30	8,219.30

Oregon State University – Pharmacy Program
2008-09 Academic Year Tuition and Required Fees – Per Term

Students Admitted Fall 2008	Pharmacy		FEES						Total	Total
Credit	Tuition		Tech-			Health	Registra-	Total	Fees + Tuition	Fees + Tuition
Hours	Residents	Non-Residents	nology	Building	Incidental	Service	tion	Fees	Residents	Non-Residents
Full-Time										
12 or more Credit Hours	5,496.00	8,664.00	105.00	45.00	240.11	125.19	11.00	526.30	6,022.30	9,190.30
Part-Time (Degree Students)										
1	458.00	722.00	17.00	23.00	185.11	125.19	11.00	361.30	819.30	1,083.30
2	916.00	1,444.00	28.00	25.00	190.11	125.19	11.00	379.30	1,295.30	1,823.30
3	1,374.00	2,166.00	39.00	27.00	195.11	125.19	11.00	397.30	1,771.30	2,563.30
4	1,832.00	2,888.00	50.00	29.00	200.11	125.19	11.00	415.30	2,247.30	3,303.30
5	2,290.00	3,610.00	61.00	31.00	205.11	125.19	11.00	433.30	2,723.30	4,043.30
6	2,748.00	4,332.00	72.00	33.00	210.11	125.19	11.00	451.30	3,199.30	4,783.30
7	3,206.00	5,054.00	83.00	35.00	215.11	125.19	11.00	469.30	3,675.30	5,523.30
8	3,664.00	5,776.00	94.00	37.00	220.11	125.19	11.00	487.30	4,151.30	6,263.30
9	4,122.00	6,498.00	105.00	39.00	225.11	125.19	11.00	505.30	4,627.30	7,003.30
10	4,580.00	7,220.00	105.00	41.00	230.11	125.19	11.00	512.30	5,092.30	7,732.30
11	5,038.00	7,942.00	105.00	43.00	235.11	125.19	11.00	519.30	5,557.30	8,461.30

Oregon State University – Veterinary Medicine
2008-09 Academic Year Tuition and Required Fees – Per Term

Credit Hours	Graduate Tuition Residents	Graduate Tuition Non-Residents	FEES Tech-nology	FEES Building	FEES Incidental	FEES Health Service	FEES Registra-tion	Total Fees	Total Fees + Tuition Residents	Total Fees + Tuition Non-Residents
First - Third Year Students										
Full - Time	5,342.00	10,791.00	105.00	45.00	240.11	125.19	11.00	526.30	5,868.30	11,317.30
Fourth Year Students										
Full - Time	4,007.00	8,093.00	105.00	45.00	240.11	125.19	11.00	526.30	4,533.30	8,619.30

Endnotes:

Veterinary Medicine students will not be assessed the over-time fee. 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.

Third Year veterinary students registering at Oregon State University for a session scheduled early May to mid-July will be assessed a one-term fee as above.

Fourth Year students taking a series of study, externship, and vocation blocks from mid-July through early June will be assessed four term fees during that period of time. Fee payment dates will correspond to normal Fall, Winter, Spring and Summer term schedule.

Qualified tuition and fees do not include student health insurance fees for Tax Relief Act reporting.

Oregon State University – Cascades Campus
2008-09 Academic Year Tuition and Required Fees – Per Term

Credit Hours	Undergraduate Tuition Residents	Undergraduate Tuition Non-Residents	FEES Tech-nology	FEES Building	FEES Incidental	FEES Health Service	FEES Registra-tion	Total Fees	Total Fees + Tuition Residents	Total Fees + Tuition Non-Residents
1	128.00	479.00	17.00	23.00	88.00	0.00	11.00	139.00	267.00	618.00
2	256.00	958.00	25.00	25.00	92.00	0.00	11.00	153.00	409.00	1,111.00
3	384.00	1,437.00	33.00	27.00	96.00	0.00	11.00	167.00	551.00	1,604.00
4	512.00	1,916.00	41.00	29.00	100.00	0.00	11.00	181.00	693.00	2,097.00
5	640.00	2,395.00	49.00	31.00	104.00	0.00	11.00	195.00	835.00	2,590.00
6	768.00	2,874.00	57.00	33.00	108.00	0.00	11.00	209.00	977.00	3,083.00
7	896.00	3,353.00	65.00	35.00	112.00	0.00	11.00	223.00	1,119.00	3,576.00
8	1,024.00	3,832.00	73.00	37.00	116.00	0.00	11.00	237.00	1,261.00	4,069.00
9	1,152.00	4,311.00	81.00	39.00	120.00	0.00	11.00	251.00	1,403.00	4,562.00
10	1,280.00	4,790.00	89.00	41.00	125.00	0.00	11.00	266.00	1,546.00	5,056.00
11	1,408.00	5,269.00	97.00	43.00	130.00	0.00	11.00	281.00	1,689.00	5,550.00
12	1,536.00	5,748.00	105.00	45.00	135.00	0.00	11.00	296.00	1,832.00	6,044.00
13	1,536.00	5,748.00	105.00	45.00	135.00	0.00	11.00	296.00	1,832.00	6,044.00
14	1,536.00	5,748.00	105.00	45.00	135.00	0.00	11.00	296.00	1,832.00	6,044.00
15	1,536.00	5,748.00	105.00	45.00	135.00	0.00	11.00	296.00	1,832.00	6,044.00
16	1,536.00	5,748.00	105.00	45.00	135.00	0.00	11.00	296.00	1,832.00	6,044.00
17	1,664.00	6,227.00	105.00	45.00	135.00	0.00	11.00	296.00	1,960.00	6,523.00
18	1,792.00	6,706.00	105.00	45.00	135.00	0.00	11.00	296.00	2,088.00	7,002.00
19	1,920.00	7,185.00	105.00	45.00	135.00	0.00	11.00	296.00	2,216.00	7,481.00
20	2,048.00	7,664.00	105.00	45.00	135.00	0.00	11.00	296.00	2,344.00	7,960.00
21	2,176.00	8,143.00	105.00	45.00	135.00	0.00	11.00	296.00	2,472.00	8,439.00
22	2,304.00	8,622.00	105.00	45.00	135.00	0.00	11.00	296.00	2,600.00	8,918.00
23	2,432.00	9,101.00	105.00	45.00	135.00	0.00	11.00	296.00	2,728.00	9,397.00
24	2,560.00	9,580.00	105.00	45.00	135.00	0.00	11.00	296.00	2,856.00	9,876.00
25	2,688.00	10,059.00	105.00	45.00	135.00	0.00	11.00	296.00	2,984.00	10,355.00
Each Add'l Credit Hour	**128.00**	**479.00**								

Endnotes:

Oregon State University – Cascades Campus
2008-09 Academic Year Tuition and Required Fees – Per Term

Credit Hours	Graduate Tuition Residents	Graduate Tuition Non-Residents	FEES Tech-nology	FEES Building	FEES Incidental	FEES Health Service	FEES Registra-tion	Total Fees	Total Fees + Tuition Residents	Total Fees + Tuition Non-Residents
1	348.00	564.00	17.00	23.00	95.00	0.00	11.00	146.00	494.00	710.00
2	696.00	1,128.00	28.00	26.00	100.00	0.00	11.00	165.00	861.00	1,293.00
3	1,044.00	1,692.00	39.00	29.00	105.00	0.00	11.00	184.00	1,228.00	1,876.00
4	1,392.00	2,256.00	50.00	32.00	110.00	0.00	11.00	203.00	1,595.00	2,459.00
5	1,740.00	2,820.00	61.00	35.00	115.00	0.00	11.00	222.00	1,962.00	3,042.00
6	2,088.00	3,384.00	72.00	38.00	120.00	0.00	11.00	241.00	2,329.00	3,625.00
7	2,436.00	3,948.00	83.00	41.00	125.00	0.00	11.00	260.00	2,696.00	4,208.00
8	2,784.00	4,512.00	94.00	43.00	130.00	0.00	11.00	278.00	3,062.00	4,790.00
9	3,132.00	5,076.00	105.00	45.00	135.00	0.00	11.00	296.00	3,428.00	5,372.00
10	3,132.00	5,076.00	105.00	45.00	135.00	0.00	11.00	296.00	3,428.00	5,372.00
11	3,132.00	5,076.00	105.00	45.00	135.00	0.00	11.00	296.00	3,428.00	5,372.00
12	3,132.00	5,076.00	105.00	45.00	135.00	0.00	11.00	296.00	3,428.00	5,372.00
13	3,132.00	5,076.00	105.00	45.00	135.00	0.00	11.00	296.00	3,428.00	5,372.00
14	3,132.00	5,076.00	105.00	45.00	135.00	0.00	11.00	296.00	3,428.00	5,372.00
15	3,132.00	5,076.00	105.00	45.00	135.00	0.00	11.00	296.00	3,428.00	5,372.00
16	3,132.00	5,076.00	105.00	45.00	135.00	0.00	11.00	296.00	3,428.00	5,372.00
Each Add'l Credit Hour	**348.00**	**564.00**								

Endnotes:

Oregon State University – Master of Public Health
2008-09 Academic Year Tuition and Required Fees – Per Term

Students Admitted Prior to Fall 2008

Credit Hours	Master of Public Health Graduate Tuition Residents	Non-Residents	FEES Tech-nology	Building	Incidental	Health Service	Registra-tion	Total Fees	Total Fees + Tuition Residents	Total Fees + Tuition Non-Residents
1	372.00	603.00	17.00	23.00	192.11	125.19	11.00	368.30	740.30	971.30
2	744.00	1,206.00	28.00	26.00	198.11	125.19	11.00	388.30	1,132.30	1,594.30
3	1,116.00	1,809.00	39.00	29.00	204.11	125.19	11.00	408.30	1,524.30	2,217.30
4	1,488.00	2,412.00	50.00	32.00	210.11	125.19	11.00	428.30	1,916.30	2,840.30
5	1,860.00	3,015.00	61.00	35.00	216.11	125.19	11.00	448.30	2,308.30	3,463.30
6	2,232.00	3,618.00	72.00	38.00	222.11	125.19	11.00	468.30	2,700.30	4,086.30
7	2,604.00	4,221.00	83.00	41.00	228.11	125.19	11.00	488.30	3,092.30	4,709.30
8	2,976.00	4,824.00	94.00	43.00	234.11	125.19	11.00	507.30	3,483.30	5,331.30
9	3,348.00	5,427.00	105.00	45.00	240.11	125.19	11.00	526.30	3,874.30	5,953.30
10	3,348.00	5,427.00	105.00	45.00	240.11	125.19	11.00	526.30	3,874.30	5,953.30
11	3,348.00	5,427.00	105.00	45.00	240.11	125.19	11.00	526.30	3,874.30	5,953.30
12	3,348.00	5,427.00	105.00	45.00	240.11	125.19	11.00	526.30	3,874.30	5,953.30
13	3,348.00	5,427.00	105.00	45.00	240.11	125.19	11.00	526.30	3,874.30	5,953.30
14	3,348.00	5,427.00	105.00	45.00	240.11	125.19	11.00	526.30	3,874.30	5,953.30
15	3,348.00	5,427.00	105.00	45.00	240.11	125.19	11.00	526.30	3,874.30	5,953.30
16	3,348.00	5,427.00	105.00	45.00	240.11	125.19	11.00	526.30	3,874.30	5,953.30
Each Add'l Credit Hour	**372.00**	**603.00**								

Oregon State University – Master of Public Health
2008-09 Academic Year Tuition and Required Fees – Per Term

Students Admitted Fall 2008

Credit Hours	Master of Public Health Graduate Tuition Residents	Master of Public Health Graduate Tuition Non-Residents	FEES Tech-nology	FEES Building	FEES Incidental	FEES Health Service	FEES Registra-tion	Total Fees	Total Fees + Tuition Residents	Total Fees + Tuition Non-Residents
1	406.00	658.00	17.00	23.00	192.11	125.19	11.00	368.30	774.30	1,026.30
2	812.00	1,316.00	28.00	26.00	198.11	125.19	11.00	388.30	1,200.30	1,704.30
3	1,218.00	1,974.00	39.00	29.00	204.11	125.19	11.00	408.30	1,626.30	2,382.30
4	1,624.00	2,632.00	50.00	32.00	210.11	125.19	11.00	428.30	2,052.30	3,060.30
5	2,030.00	3,290.00	61.00	35.00	216.11	125.19	11.00	448.30	2,478.30	3,738.30
6	2,436.00	3,948.00	72.00	38.00	222.11	125.19	11.00	468.30	2,904.30	4,416.30
7	2,842.00	4,606.00	83.00	41.00	228.11	125.19	11.00	488.30	3,330.30	5,094.30
8	3,248.00	5,264.00	94.00	43.00	234.11	125.19	11.00	507.30	3,755.30	5,771.30
9	3,654.00	5,922.00	105.00	45.00	240.11	125.19	11.00	526.30	4,180.30	6,448.30
10	3,654.00	5,922.00	105.00	45.00	240.11	125.19	11.00	526.30	4,180.30	6,448.30
11	3,654.00	5,922.00	105.00	45.00	240.11	125.19	11.00	526.30	4,180.30	6,448.30
12	3,654.00	5,922.00	105.00	45.00	240.11	125.19	11.00	526.30	4,180.30	6,448.30
13	3,654.00	5,922.00	105.00	45.00	240.11	125.19	11.00	526.30	4,180.30	6,448.30
14	3,654.00	5,922.00	105.00	45.00	240.11	125.19	11.00	526.30	4,180.30	6,448.30
15	3,654.00	5,922.00	105.00	45.00	240.11	125.19	11.00	526.30	4,180.30	6,448.30
16	3,654.00	5,922.00	105.00	45.00	240.11	125.19	11.00	526.30	4,180.30	6,448.30
Each Add'l Credit Hour	**406.00**	**658.00**								

Oregon State University – Masters of Business Administration
2008-09 Academic Year Tuition and Required Fees – Per Term

Credit Hours	MBA Program Graduate Tuition Residents	Non-Residents	FEES Tech-nology	Building	Incidental	Health Service	Registra-tion	Total Fees	Total Fees + Tuition Residents	Total Fees + Tuition Non-Residents
1	372.00	603.00	17.00	23.00	192.11	125.19	11.00	368.30	740.30	971.30
2	744.00	1,206.00	28.00	26.00	198.11	125.19	11.00	388.30	1,132.30	1,594.30
3	1,116.00	1,809.00	39.00	29.00	204.11	125.19	11.00	408.30	1,524.30	2,217.30
4	1,488.00	2,412.00	50.00	32.00	210.11	125.19	11.00	428.30	1,916.30	2,840.30
5	1,860.00	3,015.00	61.00	35.00	216.11	125.19	11.00	448.30	2,308.30	3,463.30
6	2,232.00	3,618.00	72.00	38.00	222.11	125.19	11.00	468.30	2,700.30	4,086.30
7	2,604.00	4,221.00	83.00	41.00	228.11	125.19	11.00	488.30	3,092.30	4,709.30
8	2,976.00	4,824.00	94.00	43.00	234.11	125.19	11.00	507.30	3,483.30	5,331.30
9	3,348.00	5,427.00	105.00	45.00	240.11	125.19	11.00	526.30	3,874.30	5,953.30
10	3,348.00	5,427.00	105.00	45.00	240.11	125.19	11.00	526.30	3,874.30	5,953.30
11	3,348.00	5,427.00	105.00	45.00	240.11	125.19	11.00	526.30	3,874.30	5,953.30
12	3,348.00	5,427.00	105.00	45.00	240.11	125.19	11.00	526.30	3,874.30	5,953.30
13	3,348.00	5,427.00	105.00	45.00	240.11	125.19	11.00	526.30	3,874.30	5,953.30
14	3,348.00	5,427.00	105.00	45.00	240.11	125.19	11.00	526.30	3,874.30	5,953.30
15	3,348.00	5,427.00	105.00	45.00	240.11	125.19	11.00	526.30	3,874.30	5,953.30
16	3,348.00	5,427.00	105.00	45.00	240.11	125.19	11.00	526.30	3,874.30	5,953.30
Each Add'l Credit Hour	**372.00**	**603.00**								

Endnote:
Additional resource fees of $35.00 per credit hour up to $350.00 per term apply.
Please see the Programatic Resource Fee Schedule on Page 56.

OREGON STATE UNIVERSITY - CORVALLIS CAMPUS

2008-09 Academic Year - Per Term

Programmatic Resource Fees - colleges, schools and majors Fees are per term unless otherwise specified	Undergraduate	Graduate
Preengineering ($20.00 per credit hour up to $205.00 per term)	205.00	
Engineering ($44.00 per credit hour up to $443.00 per term)	443.00	430.00
School of Business	130.00	
MBA Students ($35.00 per credit hour up to $350.00 per term)		350.00
Weatherford Residential College	250.00	250.00
College of Liberal Arts upper division courses	40.00	
Department of Art	100.00	100.00
College of Science upper division courses	40.00	
Department of Human Development & Family Sciences majors	75.00	
Department of Design and Human Environment		
Apparel Design	100.00	
Interior Design	100.00	
Housing Studies	100.00	
Merchandising Management	75.00	
Interdisciplinary Studies		35.00
Educational Resources	50.00	50.00
Honors College	250.00	250.00
Matriculation Fee (one time on all new and transfer students)	300.00	205.00

OREGON STATE UNIVERSITY - CASCADES CAMPUS

Universal and Programmatic Resource Fees - colleges, schools and majors Fees are per term unless otherwise specified	Undergraduate	Graduate
Department of Art	100.00	100.00
School of Business	130.00	
Educational Resourses	50.00	50.00
Matriculation Fee (one time on all new and transfer students)	300.00	205.00

Student Fees

Mandatory enrollment fees include the Building, Health Service, and Incidental Fees. Students enrolled under the part-time student fee policy are subject to these fees at a rate appropriate to the specific number of credit hours taken each term.

SUMMARY OF STUDENT FEE INCOME

	FY2007 Actual	FY2008 Actual	Dollar Change	Percent Change
INSTRUCTIONAL FEES				
Tuition	120,754,209	127,163,583	6,409,374	5.31%
OTHER FEES				
Building Fees	2,448,299	2,518,657	70,358	2.87%
Study Resources Fees	12,408,570	12,768,110	359,540	2.90%
Student Health Fee	5,788,512	6,648,208	859,696	14.85%
Incidental Fees	10,539,049	11,591,715	1,052,666	9.99%
Other Student Fees	6,328,669	7,036,536	707,866	11.19%
TOTAL STUDENT FEE INCOME	**158,267,309**	**167,726,809**	**8,751,633**	**5.53%**

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

Resource Fees:
Programmatic resource fees were established to provide funds to assist with faculty, resource materials, equipment and specialized services. Programmatic resource fees vary by institution and are assessed to students admitted to or enrolled in a school, college or department, or degree program.

Health Services Fee:
This fee is used to support student health services, which are operated as an auxiliary enterprise on a self-sustaining basis. Optional health insurance policies are covered by this fee. During summer sessions, student health services operations function at reduced levels or are not provided at all. The recommended summer session rates reflect these lower levels of activity.

Incidental Fee:
Incidental fee recommendations are made by student committees in accordance with a Board-approved incidental fee policy (OAR 580-010-0090). In some instances, the student committee recommendations are supported by general campus student referenda. Funds generated by incidental fees are used to fund student union operations, educational, cultural and student government activities and athletics.

Other Student Fees:
The Laboratory or Course Fees must be published in the schedule of classes. Laboratory or Course Fees are limited to institutional sale to students of equipment, materials, or instruction where the equipment or material is not readily available for purchase through the bookstore or other external source.

Annual Tuition and Fee Rates for Full-Time Students[1]
1999-00 thru 2008-09

Historical data on annual tuition and fee rates have been tracked for various OSU programs. Below is a table showing annual rates for full-time students (12 credit hours) from FY00-FY09. Historical rates for tuition and fees are presented for undergraduate students, graduate students, veterinary medicine program students, and pharmacy program students.

FY	1999-00	2000-01	2001-02	2002-03[2]	2003-04[3]	2004-05[4]	2005-06[5]	2006-07[6]	2007-08	2008-09
Undergraduate										
Resident	3,561	3,654	3,987	4,371	4,944	5,319	5,442	5,643	5,911	6,187
Nonresident	12,405	13,104	13,935	15,255	17,700	17,667	17,502	17,559	18,186	18,823
Graduate										
Resident	6,501	6,891	4,713	8,211	9,366	9,345	9,405	10,179	10,572	10,975
Nonresident	11,073	11,703	12,456	13,668	15,603	15,582	15,642	15,699	16,243	16,807
Vet Med										
Resident	10,275	10,860	11,580	12,825	14,811	14,790	14,850	15,585	16,567	17,605
Nonresident	20,058	21,159	22,395	24,528	28,284	28,263	28,323	29,733	31,987	33,952
Pharmacy										
Resident	7,677	8,127	8,709	9,726	11,061	11,040	11,100	14,406	15,414	18,067
Nonresident	15,567	16,431	17,430	19,143	21,927	21,906	21,966	24,372	25,423	27,571

[1]Tuition and fees include instruction, building, incidental, and health service fees
[2]Tuition and fees for 2002-03 reflect tuition surcharges in winter and spring trems
[3]Tuition and fees for 2003-04 reflect spring term rates
[4]Undergraduate resident rates reflect the tuition mitigation cap of 15% increase over 2003-04 undergraduate resident tuition rate
[5]Undergraduate resident rates capped at 3% increase over spring 2005 tuition rates
[6]Undergraduate resident tuition rates capped at 3% increase over 2005-06 academic year rates

Source: OUS Budget Operations Division, Academic Year Fee Book

Oregon State University
Capital Projects

The following schedule is a list of capital projects authorized by the Oregon University System Board and the Legislature for OSU as of June 30, 2008. 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. Limitation is provided by six years and then expires if it has not been used within that timeframe. The OUS may also seek authorization for expenditure limitation from the Legislative Emergency Board for projects that were not anticipated during the capital budgeting process.

The OSU Capital Projects that follow are listed 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 issued 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. Revenues 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 repaid 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.

Capital spending planned for FY 2009 includes construction of the Pauling Research & Education Building, an addition to Goss Stadium, improvements to Arnold Dining Hall, Phase II of the Apperson Hall renovations and Gill Coliseum Renovation.

Oregon State University
Authorized Capital Projects
As of June 30, 2008

Project Title	Biennium	General Funds	XI-G Bonds	XI-F Bonds	Other	Lottery Bonds	Loans & COP's	TOTAL
Memorial Union Remodel, Phase 3	03-05	-	-	5,500,000	-	-	-	5,500,000
College InnRenov/Replacement	03-05	-	-	1,000,000	11,000,000	-	-	12,000,000
Arnold Dining Center Remodel	03-05	-	-	7,000,000	-	-	-	7,000,000
Poling Hall Remodel	03-05	-	-	9,000,000	-	-	-	9,000,000
New Single Student Suites/Apartments	03-05	-	-	1,000,000	11,000,000	-	-	12,000,000
Instrumentation/Flow Imaging Lab Add	03-05	-	-	-	650,000	-	-	650,000
Graf Hall Remodel	03-05	-	4,750,000	-	9,500,000	4,750,000	-	19,000,000
Finley Hall remodel	05-07	-	-	12,500,000	-	-	-	12,500,000
Memorial Union Phase 3 Renovation	05-07	-	-	-	7,500,000	-	-	7,500,000
New Steam Plant	05-07	-	12,000,000	17,000,000	12,000,000	-	8,000,000	41,000,000
Research Park Multi-tenant #1 and #2	05-07	-	-	-	1	-	-	1
Our Little Village Child Care Center	05-07	-	-	2,200,000	-	-	-	2,200,000
Education Hall Remodel	05-07	-	-	-	-	7,152,000	1,355,000	7,152,000
Apperson Hall Remodel	05-07	-	-	-	10,000,000	-	-	10,000,000
Large Animal Hospital Addition	05-07	-	-	-	12,000,000	-	-	12,000,000
Nash Hall Seismic Improvements	05-07	-	-	-	2,000,000	-	-	2,000,000
Animal Sciences Education and Research Pavilion	05-07	-	4,000,000	-	4,000,000	-	-	8,000,000
Capital Repair/Code Compliance	05-07	3,682,700	4,029,600	-	1,590,399	-	-	9,302,699
Intramural Field Synthetic Turf Project	07-09	-	-	-	3,250,000	-	-	3,250,000
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
Total		$ 8,958,700	$ 56,561,635	$ 48,700,001	$ 90,294,435	$ 7,152,000	$ 21,179,000	$ 223,490,771

Oregon State University
Capital Budget - Major Projects
Fiscal Year 2009

	Total Authorization	Spent as of 2008	FY09 Budget
Pauling Research & Education Bldg	$ 62,512,070	$ 383,355	$ 9,000,000
Apperson Hall Renovation	14,000,000	4,049,393	8,000,000
Gill Coliseum Renovation	20,000,000	-	5,000,000
HP Building 11 Renovation	9,500,000	83,724	4,000,000
Nash Hall DM/Seismic Upgrade	17,574,000	1,091,287	4,000,000
Deferred Maintenance	17,000,000	6,702,239	12,000,000
New Steam Plant	41,000,000	12,627,647	18,000,000
Large Animal Hospital	12,000,000	7,985,903	100,000
Education Hall Remodel	7,152,000	453,302	10,000
Total	$ 200,738,070	$ 33,376,850	$ 60,110,000

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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 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 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 the 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 over the 5-7 year period following its implementation.

Revenue Distribution Model

The ERAM model is framed around a revenue distribution formula designed to complement the FY 2003 Budget Allocation Model (BAM). The 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 formula consisted of four basic components:

1. Graduate and undergraduate tuition rates that are bench-marked to the published tuition rates for a single three-credit course on the Corvallis campus.
2. A distribution formula for tuition revenues using a ratio of 80% to the academic unit, and 20% to program inventory development.
3. 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.
4. 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 Division of Administration and Budget in tracking the student credit hour (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 programs and inventory development, and 10% for central reallocations. This 10% was reallocated to support rebasing. In fiscal year 2009 an additional $800 thousand was set aside from Ecampus's fund balance which will to go toward the central pools and reserves. This is a one-time transfer.

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 Administration and Budget, 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 FY09 Revenues [1]

	Productivity Reallocation			Net Tuition		Fee
				$ 7,749,271	100.00%	$75 per SCH
		$ 1,425,112	100.00%	Academic Units	80.00%	
	Unit	Academic Units	66.40%	Ecampus	10.00%	
	Distribution %	Admin Units	33.60%	Administration	10.00%	
Academic Units:						
Ag Sci	12.32%	$ 116,614				
Business	2.00%	18,960		See Note 3 below for explanation		
Forestry	1.75%	16,523		of tuition distribution to academic		
Education	7.93%	75,078		units		
Science	22.42%	212,136				
CLA	45.61%	431,563				
COAS	1.95%	18,484				
Engineering	0.96%	9,061				
Academic Affairs	0.39%	3,731				
HHS	4.66%	44,125				
Academic Units Total	100.00%	**946,275**	**66.40%**	**6,199,417**	**80.00%**	**0**
E-Campus				**774,927**	**10.00%**	**3,773,682**
Administration		**478,837** [2]	**33.60%**	**774,927** [4]	**10.00%**	
Total		***$ 1,425,112***	***100.00%***	***$ 7,749,271***	***100.00%***	***$ 3,773,682***

[1] Rounded to whole dollars based on estimated percentage distributions.

[2] Distributed to initial budget of service units supporting Ecampus - 30% each to Library, Student Affairs and Information Services; 10% to Graduate School.

[3] The academic units receive 80% of the tuition revenue generated by each course at the end of the term.
The distribution amounts are calculated based on student enrollments and whether the student credit hours are generated by an undergraduate course or graduate course.

[4] Supports rebasing distribution

Note: In addition Ecampus students pay a $5 per credit technology fee.

REVENUE DEFINITION SECTION

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 described below.

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.

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 dollars available for allocation.

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.

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.

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.

Additional Research Support
Provides additional research support 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.

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

OUS System-wide Expenses and Programs
Provides for 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 the, funding has been reduced.

- ORBIS – Funds are provided to pay for access to online library services.

- Oregon Join Schools of Professional Business – Funds 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.

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.

Engineering Technology Undergraduates
Provides targeted funding supplemental to undergraduate cell funding per student FTE for this specialty high demand discipline.

Engineering Graduates
Provides targeted funding supplemental to graduate cell funding per student FTE for this specialty high demand discipline.

Signature Research Centers
The 2003 Legislature allocated funding for the administration of the Signature Research Centers.

The Oregon National 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 the Endangered Invertebrate Program and the Oregon Natural Heritage databank.

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.

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

Faculty Salaries
Additional funding provided by the Legislature to support improvements in faculty salary levels.

Student Faculty Ratio
Additional funding provided by the Legislature in 2007-2009 to support improvements in student faculty ratios.

Utilities
Legislative funding to recognize increases in utility costs.

Midyear Salary Pool Funding
The Legislature appropriated $22.4 million to the Oregon University System for the 2007-2009 biennial salary and health benefit cost increase, approximately $6 million less than originally anticipated.

Faculty Salaries
Allocation of funding for faculty recruitment and retention is based on proportionate RAM funding at each institution and as specified in the Legislative budget for statewide public service programs.

Tuition Structure and Assessment
Tuition is established to provide support for instructional programs and instructional support expenditures. Tuition rates vary in general based on student level and residency. In some cases, tuition rates are based on course level or the cost of providing a course. Tuition rates for students admitted to regular academic programs are based on student classification and residency:

Tuition

- Academic Year – Charges assessed to students during the academic year are comprised of the following fee structure that includes: Tuition, Resource, 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 E Campus 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.

Resource Fees
Resource fees have three forms: universal fees, asses to all students; program fees, assessed to students admitted to particular academic programs; and, one-time fees for first-term students. Students enrolled under the part-time student fee policy are subject to the resource fees appropriate to specific courses taken. Institutions may propose new resource fees for approval by the Board. Institutions have the option of assessing resource fees during the summer session at rates comparable to those assessed in the preceding academic year.

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.

Indirect 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.

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