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**Finance and Facilities Committee  
also Sitting as the Audit Committee  
Agenda**

	<u>Page</u>
1. Call to Order/Roll/Declaration of a Quorum (8:00am) <i>Trustee Paul Stewart</i>	
2. Consent Agenda <i>Trustee Paul Stewart</i>	
2.1 <a href="#"><u>Approve Minutes of the March 21, 2019 Meeting</u></a>	1
3. Reports (8:05am)	
3.1 Fiscal Operations Advisory Council (5 min) <i>FOAC Chair Richard Bailey</i>	
3.2 <a href="#"><u>Fiscal Year 2019 Third Quarter Dashboard</u></a> (8:10am) (15 min) <i>VP Brian Fox and AVP Stephanie Pope</i>	4
3.3 <a href="#"><u>Fraud, Waste, Abuse Ethics Hotline Annual Report</u></a> (8:25am) (10 min) <i>Kernutt Stokes, LLP</i>	26
4. Action Items (8:35am)	
4.1 <a href="#"><u>Acceptance of the Internal Audit Risk Assessment and Approval of the FY 2019-20 Work Plan</u></a> (15 min) <i>Kernutt Stokes, LLP</i>	31
4.2 <a href="#"><u>Authorize Staff to Enter into a Contract for Financial Auditing and Federal Single Auditing Services</u></a> (8:50am) (10 min) <i>VP Brian Fox</i>	52
4.3 <a href="#"><u>Authorize Staff to Enter into a Contract for Internal Auditing Services</u></a> (9:00am) (10 min) <i>VP Brian Fox</i>	57
4.4 <a href="#"><u>Recommendation to the Board to Approve the 2019-20 Tuition and Mandatory Fees and Authorize Staff to Forward both to the HECC</u></a> (9:10am) (45 min) <i>VP Brian Fox and ASOIT Presidents Junmin Yee and Johnathan Nguyen</i>	58
4.5 <a href="#"><u>Recommendation to the Board to Adopt the 2019-20 All Funds Budget</u></a> (9:55am) (45 min) <i>VP Brian Fox and AVP Stephanie Pope</i>	113
4.6 <a href="#"><u>Recommendation to the Board to Authorize Staff to Enter into a Partnership Agreement and Purchase Radiological Sciences Equipment in Excess of One Million Dollars</u></a> (10:40am) (15 min) <i>VP Brian Fox and Associate Professor Don McDonnell</i>	124
5. Discussion Items – none	
6. Other Business/New Business (10:55am) (5 min) <i>Trustee Paul Stewart</i>	
7. Adjournment (11:00am)	



**Meeting of the  
Oregon Tech Board of Trustees  
Finance and Facilities Committee  
Sunset Room, Klamath Falls Campus  
March 21, 2019  
8:00am – 10:30am**

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**Finance and Facilities Committee  
also Sitting as the Audit Committee  
DRAFT MINUTES**

**Trustees Present:**

Vince Jones, Chair	Nagi Naganathan, President	Mike Starr (via phone)
Jessica Gomez, Vice Chair	Grace Rusth	Paul Stewart

**University Faculty and Staff Present:**

Thom Darrah, Director of Facilities Services and Capital Planning  
Erin Foley, VP of Student Services/Dean of Student Affairs  
Brian Fox, VP of Finance and Administration  
Brittany Miles, AVP Government Relations  
Stephanie Pope, AVP of Budget and Resource Planning  
Di Saunders, AVP of Communication and Public Affairs  
John VanDyke, Athletic Director  
Erika Veth, AVP of Strategic Enrollment Management

**Others Present:**

Lee Ayers-Preboski, HECC Commissioner/SOU Professor  
Mandy Butler, TVA Architects  
Elisa Rocha, TVA Architects  
Tim Wybenga, TVA Architects  
Junmin Yee, Klamath Falls ASOIT President

**3. Call to Order/Roll/Declaration of a Quorum**

**Chair Jones called the meeting to order at 8:03am. The Secretary called roll and a quorum was declared.**

**4. Consent Agenda**

**2.2 Approval of Minutes of the January 24, 2019 Meeting**

**Trustee Stewart moved to approve the minutes. Trustee Rusth seconded the motion. With all trustees present voting aye, the motion passed unanimously.**

### 3. Reports

#### 3.1 Fiscal Operations Advisory Council - none

#### 3.2 Fiscal Year 2019 Second Quarter Dashboard

**AVP Pope** reviewed the details of the second quarter dashboard. Discussion regarding cash-on hand and the availability of information. **VP Fox** reviewed the status of the capital projects. He stated this year the auditors will look at OMIC and Athletics. He reviewed the fraud, waste, and abuse hotline cases and noted the audit contracts will be up for renewal soon.

#### 3.3 State Budget and Legislative Update

**AVP Brittany Miles** explained the unpredictability and timing of the state budget this biennium and the effect on the Public University Support Fund and the Engineering Technology Support Fund, Sports Lottery, and OREC. Discussion regarding PERS allocation; it is anticipated PERS increases will continue for at least a decade. Because the state budget cannot manage these increases, universities will need to either drive up efficiency, make cuts, or increase tuition. **Commissioner Ayers** stated the HECC has pushed back, questioning what portion of funding the universities is the obligation of the state given there were commitments made by the previous Oregon University System that each university has had to take on. There is hope that the state will value higher education and allow institutions to maintain the things that were put into place without putting the cost on the backs of the students. The imbalance of a broken system will mean that the seven universities and 17 community colleges will not be sustainable.

### 4. Action Items

#### 4.1 Recommendation to the Board to Approve Recreation Center Student Fee

**VP Fox** introduced ASOIT President Yee and Athletic Director VanDyke, and gave an overview of the student recreation center project timeline and participants. **Director Van Dyke** reviewed the project scope and existing conditions. **President Yee** explained the results of the student forum discussions and the ASOIT recommendation. **VP Fox** explained the recreation center is currently open to staff and faculty with a per term fee; it is anticipated to continue in this manner, which could defray the cost for the students. The student fee was calculated using 2,200 students. As enrollment grows the cost can be reduced or services can be added. **Director Van Dyke** stated a full-time employee would be in charge of programming, payroll, and event planning. Discussion regarding hours of operation.

**Trustee Stewart** moved to recommend the board approve a new Recreation Center Student Fee in the amount of \$69.00 for all students enrolled at the Klamath Falls campus, excluding Dual Credit and Advanced Credit Program students or similar such programs, beginning during the Fall Term of 2019 and approve expenditures as requested by the President and determined by ASOIT. **Trustee Rusth** seconded the motion. With all trustees present voting aye, the motion passed unanimously.

### 8. Discussion Items

#### 5.1 Tuition Development Process Update

**VP Fox** outlined the Tuition Recommendation Committee charter, guiding principles, membership, and the legislative requirements. He estimated the impact of reduced federal funding and the impact on students, and the need to look at our remissions plan. **Chair Jones** requested the committee look at how this might impact minority and low-income students, scholarships and remissions; how this might impact the education of the students in terms of them completing their degrees. **VP Foley** stated housing and dining fees are also estimated to increase and these fees are considered when reviewing tuition rates.

## 5.2 Operating Expense Analysis

**AVP Pope** explained the intent of the analysis is to review the comparisons on both the revenue and expense sides and to assist the decision making processes and strategic planning. She reviewed the data sources used, gave an institutional overview, noted the state and national comparators, and identified the university's revenue sources. Discussion regarding specific comparisons.

## 5.3 CEET Project Update

**Mandy Butler, Tim Wybenga and Elisa Rocha** gave a PowerPoint presentation reviewing the CEET visioning process and programming effort, site planning process, programmatic elements, plan diagrams, sustainability components, project goals, schematic designs, and the next steps of the process. **Chair Jones** requested another presentation as the project progresses.

*Trustee Gomez joined the meeting at 10:23am.*

## 9. Other Business/New Business - none

## 10. Adjournment

**The meeting was adjourned at 10:33am.**

Respectfully submitted,



Sandra Fox  
Board Secretary

# REPORT

## Agenda Item No. 3.2

### Finance, Facilities and Audit Status: Quarterly Review

#### Background

The following Quarterly Finance, Facilities and Audit Status Report provides information on the major areas of responsibility for the Finance and Administration Division of Oregon Tech. This includes budget, forward looking revenue and enrollment indicators, facilities, equipment and capital projects as well as internal and external audit coordination. This information is used by the Vice President of Finance and Administration to track progress of the institution in meeting its financial and operational goals, and reported to the Finance and Facilities Committee on a quarterly basis.

#### Staff Recommendation

No action required. For discussion purposes only.

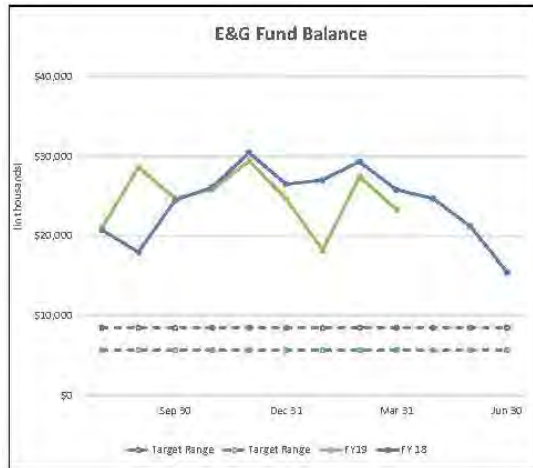
#### Attachments

Q3 FY 2019 Quarterly Finance, Facilities and Audit Status Reports including the following:

- A. [Financial and Enrollment Dashboard](#)
- B. [Quarterly Managerial Report](#)
- C. [Facilities and Capital Projects](#)
  - a. Capital Projects Status Report
  - b. Deferred Maintenance and Capital Renewal
- D. [Audit Status Updates](#)
- E. [Quarterly Investment Report](#)

## ATTACHMENT A

### Financial and Enrollment Dashboard



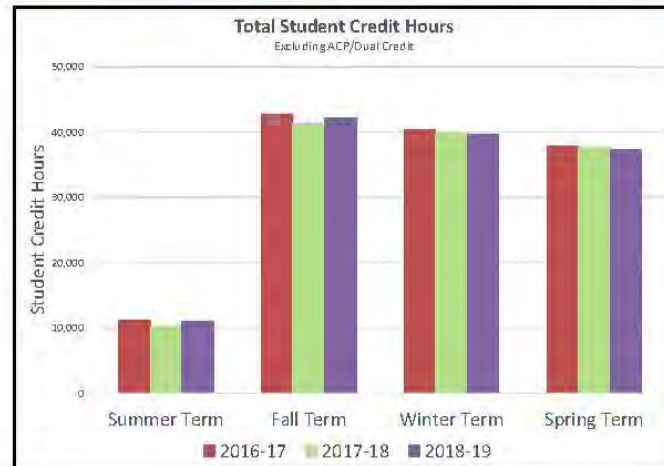
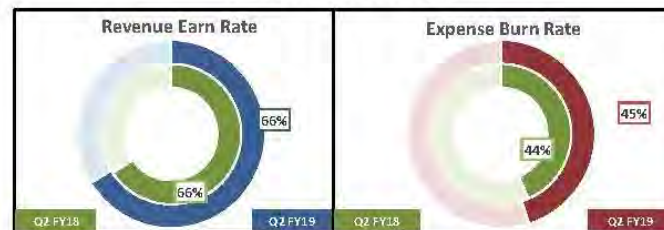
Key Financial Indicators		
E&G Fund Balance:	23,316	As of March 31, 2019
Total Cash on Hand:	24,090	As of March 31, 2019
E&G Cash on Hand:	15,669	As of March 29, 2019
Days Cash on Hand:	115 Days	As of March 31, 2019
Debt Burden Ratio:	3.98%	As of June 30, 2018
Quasi Endowment:	7,375	As of March 31, 2019
Foundation Assets:	\$31,198	As of June 30, 2018
Deferred Maint. Backlog:		

Student Tuition		
Undergraduate Tuition		
	2018-19	2017-18
Resident:	\$8,277	\$7,921
Non-Resident:	\$26,345	\$25,211
WUE:	\$12,416	\$11,882
Online:	\$11,025	\$11,025
Differential:	25% Premium	20% Premium
Graduate Tuition		
	2018-19	2017-18
Resident:	\$3,844	\$14,927
Non-Resident:	\$6,452	\$34,886
Online:	\$11,088	\$11,088
ETM Differential:	25% Premium	20% Premium

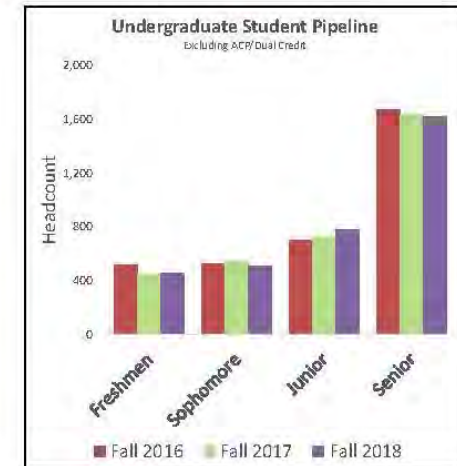
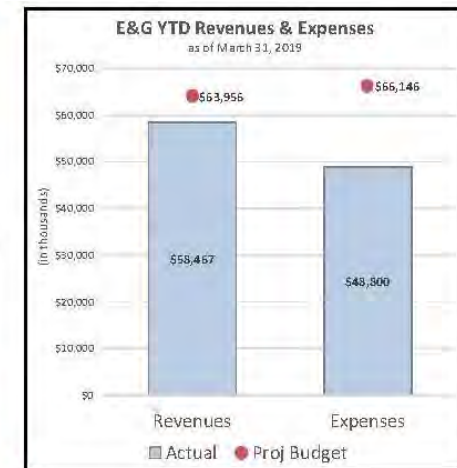
## Oregon TECH

### Quarterly Financial Dashboard

As of March 31, 2019



Degree Completions				
		2017-18	2016-17	2015-16
Undergraduate	Resident:	516	557	558
	Non-Resident:	212	218	194
Graduate	Resident:	7	4	8
	Non-Resident:	11	13	16
				3 Year Δ



**Notes:**

- Undergrad. tuition calculated at 15 credits; Grad. tuition at 9 credits
- Enrollment and completion projection dates as of 02/06/2018

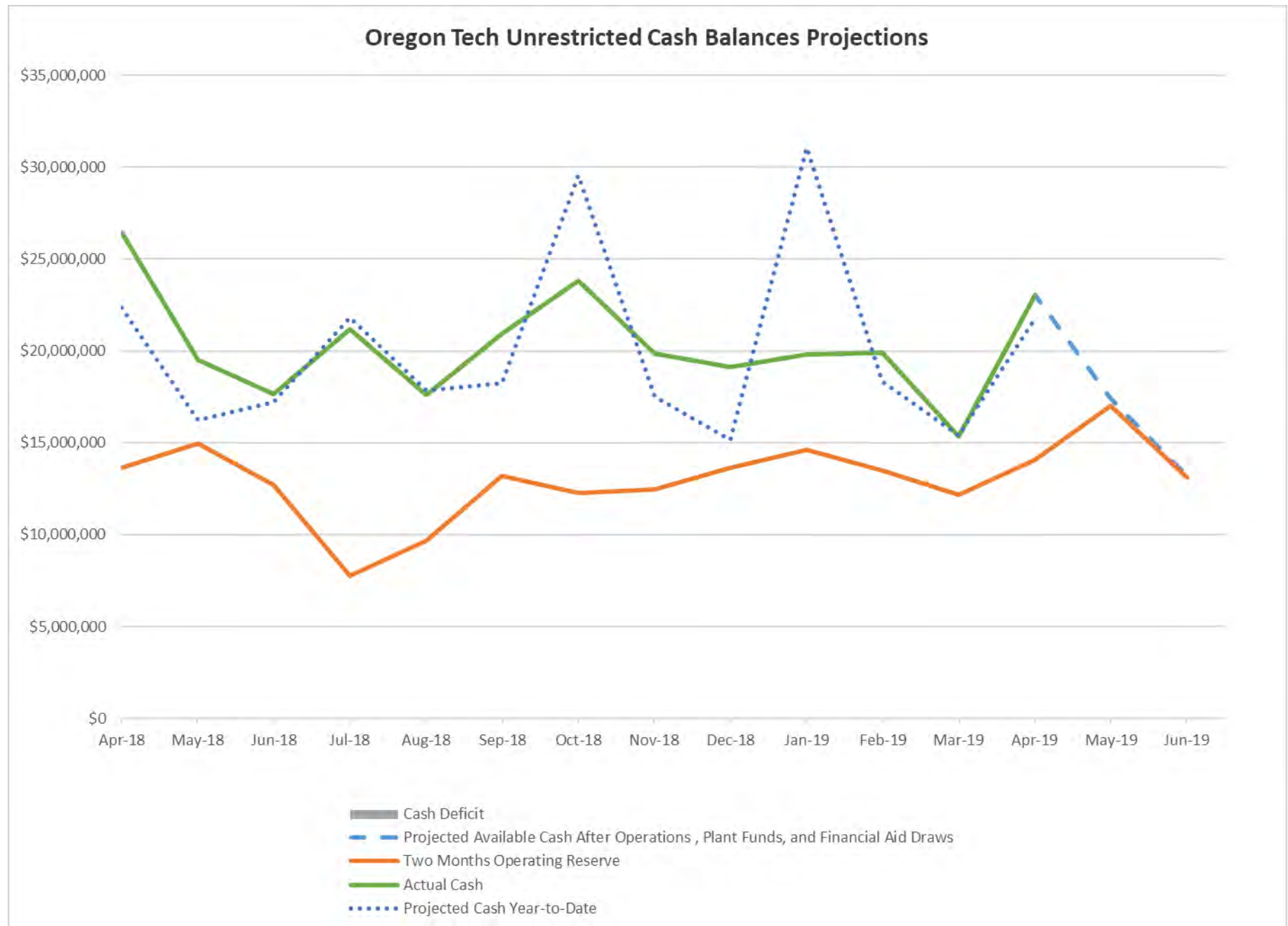


**General Fund Monthly Report**  
March 2019

Acct	YTD Comparison		FY19 Forecast				Notes
	FY18 YTD March Actuals	FY19 YTD March Actuals	FY18 Year End Actuals	Board Adopted Budget	Adjusted Budget	Year-End Forecast	
State Allocations	23,003	24,302	27,657	29,301	28,945	28,945	(1)
Tuition & Fees	32,961	35,060	33,639	35,558	37,953	35,785	(2)
Remissions	(3,504)	(3,658)	(3,843)	(4,111)	(4,558)	(3,934)	(2)
Other	1,197	2,762	1,828	1,557	1,557	3,160	(3)
<b>Total Revenue</b>	<b>53,657</b>	<b>58,467</b>	<b>59,280</b>	<b>62,305</b>	<b>63,897</b>	<b>63,956</b>	
Unclassified	16,561	17,917	23,631	24,594	26,181	25,730	
Classified	4,064	4,202	5,422	6,000	5,862	5,811	
Student	555	639	769	1,034	1,034	1,034	
GTA	18	41	25	152	146	146	
OPE	10,506	12,261	14,633	16,616	16,144	15,223	
Salary Savings					(1,000)		
<b>Total Labor</b>	<b>31,704</b>	<b>35,061</b>	<b>44,481</b>	<b>48,396</b>	<b>48,367</b>	<b>47,944</b>	(4)
Service & Supplies	7,328	9,159	10,654	11,640	12,718	12,479	(5)
Internal Sales	(779)	(693)	(1,154)	(491)	(829)	(870)	
Debt Service	471	1,123	1,034	1,468	1,468	1,468	
Capital	398	338	730	1,179	1,061	692	
Utilities	836	892	1,274	1,103	1,103	1,101	(6)
Transfers Out	1,003	1,266	1,334	1,551	1,551	1,684	(7)
<b>Total Direct Expense</b>	<b>9,257</b>	<b>12,084</b>	<b>13,871</b>	<b>16,450</b>	<b>17,072</b>	<b>16,554</b>	
<b>Total All Expense</b>	<b>40,962</b>	<b>47,145</b>	<b>58,352</b>	<b>64,846</b>	<b>65,439</b>	<b>64,499</b>	
<b>Net From Operations</b>	<b>12,695</b>	<b>11,322</b>	<b>928</b>	<b>(2,541)</b>	<b>(1,543)</b>	<b>(543)</b>	
Extraordinary Transfers In	246	21	291	302	4	29	
Extraordinary Transfers Out	(261)	(1,676)	(366)	-	(350)	(1,676)	(8)
Strategic Investment Fund							
Contingency Fund							
Miscellaneous	-	-		-			
Special Projects	-	-	(205)	-			
Fund Additions/(Deductions)	-	-	(113)	-			
<b>Change in Fund Balance</b>	<b>12,680</b>	<b>9,667</b>	<b>535</b>	<b>(2,239)</b>	<b>(1,889)</b>	<b>(2,189)</b>	
Beginning Fund Balance	13,114	13,649	13,114	13,649	13,649	13,649	
<b>Ending Fund Balance</b>	<b>25,794</b>	<b>23,316</b>	<b>13,649</b>	<b>11,410</b>	<b>11,760</b>	<b>11,459</b>	
Ending Cash Balance	17,843	15,711	12,702				
% Operating Revenues	48.1%	39.9%	23.0%	18.3%	18.4%	17.9%	

**Notes:****Education & General**

- (1) FY19 Adjusted Budget: Reflects the True Up adjustments of the SSCM model.
- (2) FY19 Forecast: Had a drop in enrollment Spring Term --> Lower than expected Winter Term to Spring Term retention, causing loss of total SCH and Tuition Revenue
- (3) FY18 Actuals: An adjustment to OMIC revenue pushed other revenue down in FY18;  
FY19 Actuals: OMIC Revenues = \$1,173M and are offset by \$1.025M in transfers out below  
FY19 Forecast: OMIC Revenues = \$1,326M and will be offset in transfers out below
- (4) FY19 Year End Forecast: Estimated salary savings based on currently available vacancies.  
FY19 Actuals: Increases in faculty compensation due to fewer failed searches and increased health and retirement costs
- (5) FY19 Actuals: S&S includes increased ITS spending on classroom upgrades and equipment allocations made in FY18 and carried forward into FY19
- (6) FY19 Forecast: First phase of Sewer and Storm Water System repairs completed. Anticipated savings of \$100K during FY19.
- (7) FY19 Forecast: Athletics and Shaw Library total adjusted to actual, including additional GF support totals.
- (8) FY19 Actuals: Includes \$277k to support capital projects, \$61k transfer to equipment reserves, \$313k FY18 carryover to reserves, and \$1.025M within OMIC





## ATTACHMENT C

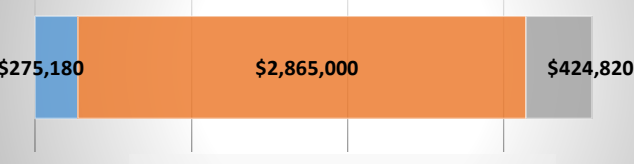
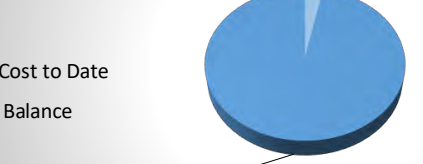
### Facilities and Capital Projects

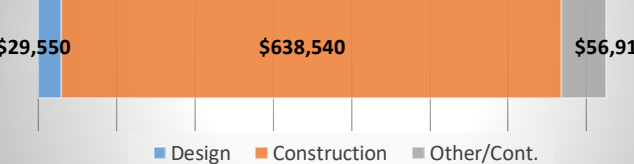

Capital Bond Projects - Status Report										4/30/2019			
Cornett Renovation - Phase 1 / Phase 2													
Project Start: 9.18.17						Project Completion: 9.31.20							
Project		Progress Highlights				Cost Breakdown		Orig. Budget	Rev. Budget	Cost To Date	%	Balance	
UPE777 / UPE785		* NTP: 9.18.2017											
Bond Type: XI-Q / XI-G		** Phase 1a & b complete / Phase 2 underway.											
Total = \$18,725,000		Phase 1 = \$11,670,000.00				Design (6%):		\$ 1,042,020	\$ 1,073,355	\$ 785,295	73%	\$ 288,060	
Design: BBT Architects		Phase 2 = \$7,055,000.00				Construction GMP (64%):		\$ 9,090,000	\$ 15,757,665	\$ 11,729,660	74%	\$ 4,028,005	
CM/GC: Adroit Const.		Project Total = \$18,725,000.00				Other (30%):		\$ 1,537,980	\$ 1,893,980	\$ 423,755	22%	\$ 1,470,225	
		Plan	Design	Bid	Build	Closeout	Project Totals:		\$ 11,670,000	\$ 18,725,000	\$ 12,938,710	69%	\$ 5,786,290
<b>Budget Breakdown</b>  ■ Design ■ Construction ■ Other/Cont.						CO's / Amendments		<b>Percent Complete (%)</b>  ■ Cost To Date ■ Balance					
						Amd. 1-9:	\$ 413,155 (AV)						
						Amd. 13-25:	\$ 257,455 (AV)						
						Amd. 27:	\$ 113,115 (AV)						
						Amd. 28:	\$ 15,535 (AV)						
						Amd. 29:	\$ 24,105 (AV)						
						Amd. 32:							
						Total:	\$ 823,365 4%						
New CEET Building													
Project Start: 6.03.2019						Project Completion: 12.31.2020							
Project		Progress Highlights				Cost Breakdown		Orig. Budget	Rev. Budget	Cost To Date	%	Balance	
UPE785 / FCEET		Visioning: May 2018 - August 2018											
Bond Type: XI-Q / XI-G		Design: November 2018 - September 2019				Replace. Parking Lot (1.5%)		\$ 525,000	\$ 525,000	\$ 236,220	45%	\$ 288,780	
		Construction: October 2019 - March 2021				Visioning/Design (7%):		\$ 2,340,000	\$ 2,464,500	\$ 637,545	26%	\$ 1,826,955	
Design: TVA Architects						Construction (77%):		\$ 27,040,000	\$ 27,040,000	\$ 20,355	0%	\$ 27,019,645	
CM/GC: Adroit Const.						Other (14.5%):		\$ 5,095,000	\$ 4,970,500	\$ 3,040	0%	\$ 4,967,460	
		Plan	Design	Bid	Build	Closeout	Project Totals:		\$ 34,475,000	\$ 34,475,000	\$ 897,160	3%	\$ 33,577,840
<b>Budget Breakdown</b>  ■ Design ■ Construction ■ Other/Cont.						CO's / Amendments		<b>Percent Complete (%)</b>  ■ Cost To Date ■ Balance					
							\$ -						
							\$ -						
							\$ -						
							\$ -						
							\$ -						
							\$ -						
							\$ -						
							\$ -						
							\$ -						
							\$ -						
						Total:	\$ -						

**Capital Bond Projects - Status Report****4/30/2019**

Academic Student Rec Center (ASRC)							
Project Start: 6.04.2018				Project Completion: 9.27.2019			
Project	Progress Highlights	Cost Breakdown	Orig. Budget	Rev. Budget	Cost To Date	%	Balance
UPE789	* Design: January 2018 - June 2018						
Bond Type: XI-F	** Construction: June 2018 - February 2020						
		Design (8%):	\$ 280,000	\$ 275,180	\$ 112,905	41%	\$ 162,275
Design: BBT Architects		Construction (80%):	\$ 2,797,765	\$ 2,865,000	\$ -	0%	\$ 2,865,000
Build: Modoc Contracting		Other (12%):	\$ 422,235	\$ 424,820	\$ 225	0%	\$ 424,595
		Project Totals:	\$ 3,500,000	\$ 3,565,000	\$ 113,130	3%	\$ 3,451,870
	Plan Design Bid Build Closeout						
<b>Budget Breakdown</b> 		CO's / Amendments		<b>Percent Complete (%)</b> 			
		\$ -					
		\$ -					
		\$ -					
		\$ -					
		\$ -					
		\$ -					
		\$ -					
		\$ -					
		Total:	\$ -				

Emerg. Storm - Phase 2b							
Project Start: 8.20.18				Project Completion: 10.26.18			
Project	Progress Highlights	Cost Breakdown	Orig. Budget	Rev. Budget	Cost To Date	%	Balance
UPE769 / FSSTD	* Design: Completed July 2018						
Bond Type: XI-Q	** Construction: August 2018 - June 2019						
		Design (5%):	\$ 29,550	\$ 29,550	\$ 12,205	41%	\$ 17,345
Design: Marquess		Construction (87%):	\$ 508,210	\$ 638,540	\$ 506,000	79%	\$ 132,540
Build: Bob's Excavating		Other (8%):	\$ 187,240	\$ 56,910	\$ 12,205	21%	\$ 44,705
		Project Totals:	\$ 725,000	\$ 725,000	\$ 530,410	73%	\$ 194,590
	Plan Design Bid Build Closeout						
<b>Budget Breakdown</b> 		CO's / Amendments		<b>Percent Complete (%)</b> 			
		CO 7 - CO 10: \$ 14,419 (UC)					
		CO 12: \$ 44,650 (UC)					
		CO 13: \$ 10,530 (AV)					
		CO 14: \$ 6,760 (AV)					
		CO 15: \$ 6,595 (AV)					
		CO 16: \$ 46,650 (AV)					
		CO 17: \$ 725 (AV)					
		\$ -					
		Total:	\$ 130,329				

Capital Bond Projects - Status Report							4/30/2019				
Academic Student Rec Center (ASRC)											
Project Start: 6.04.2018				Project Completion: 9.27.2019							
Project	Progress Highlights					Cost Breakdown	Orig. Budget	Rev. Budget	Cost To Date	%	Balance
UPE789	* Design: January 2018 - June 2018										
Bond Type: XI-F	** Construction: June 2018 - February 2020										
						Design (8%):	\$ 280,000	\$ 275,180	\$ 112,905	41%	\$ 162,275
Design: BBT Architects						Construction (80%):	\$ 2,797,765	\$ 2,865,000	\$ -	0%	\$ 2,865,000
Build: Modoc Contracting						Other (12%):	\$ 422,235	\$ 424,820	\$ 225	0%	\$ 424,595
	Plan	Design	Bid	Build	Closeout	Project Totals:	\$ 3,500,000	\$ 3,565,000	\$ 113,130	3%	\$ 3,451,870
<b>Budget Breakdown</b> 						<b>CO's / Amendments</b>					
						\$ -					
						\$ -					
						\$ -					
						\$ -					
						\$ -					
						\$ -					
						\$ -					
						\$ -					
						Total:					
						<b>Percent Complete (%)</b> 					

Emerg. Storm - Phase 2b											
Project Start: 8.20.18						Project Completion: 10.26.18					
Project	Progress Highlights					Cost Breakdown	Orig. Budget	Rev. Budget	Cost To Date	%	Balance
UPE769 / FSSTD	* Design: Completed July 2018										
Bond Type: XI-Q	** Construction: August 2018 - June 2019										
						Design (5%):	\$ 29,550	\$ 29,550	\$ 12,205	41%	\$ 17,345
Design: Marquess						Construction (87%):	\$ 508,210	\$ 638,540	\$ 506,000	79%	\$ 132,540
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<b>Budget Breakdown</b> 						<b>CO's / Amendments</b>					
						CO 7 - CO 10: \$ 14,419 (UC)					
						CO 12: \$ 44,650 (UC)					
						CO 13: \$ 10,530 (AV)					
						CO 14: \$ 6,760 (AV)					
						CO 15: \$ 6,595 (AV)					
						CO 16: \$ 46,650 (AV)					
						CO 17: \$ 725 (AV)					
						\$ -					
						\$ -					
Total:						\$ 130,329					
						<b>Percent Complete (%)</b> 					

Capital Bond Projects - Status Report										4/30/2019		
LRC/Athletics Transformer Upgrade												
Project Start: 8.20.18						Project Completion: 10.26.18						
Project		Progress Highlights				Cost Breakdown		Orig. Budget	Rev. Budget	Cost To Date	%	Balance
UPE769 / FSSTD		* Design: Completed January 2019										
Bond Type: XI-Q		** Construction: June 2019 - Sept. 2019										
Design: Fluent Engineering						Design (5%):		\$ 28,650	\$ 28,650	\$ 23,505	82%	\$ 5,145
Build: Bob's Excavating						Construction (87%):		\$ 179,750	\$ 179,750	\$ -	0%	\$ 179,750
						Other (8%):		\$ 36,600	\$ 36,600	\$ -	0%	\$ 36,600
						Project Totals:		\$ 245,000	\$ 245,000	\$ 23,505	10%	\$ 221,495
						CO's / Amendments						
						\$ -						
						\$ -						
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## Notes:

- 1) Added Value: (AV)
- 2) Errors and Omissions: (EO)
- 3) Unforeseen Conditions: (UC)
- 4) Value Engineering: (VE)

Cornett - Phase 1 (UPE777)			Cornett - Phase 2 (UPE785)		
CO's / Amendments			CO's / Amendments		
Amd. 1-9:	\$ 413,155	(AV)	Amd. 10:	\$ 6,000,000	GMP
Amd. 13:	\$ 17,725	(AV)	Amd. 11:	\$ (270,895)	(AV)
Amd. 14:	\$ 51,260	(AV)	Amd. 12:	\$ (789,250)	(AV)
Amd. 17:	\$ 15,455	(AV)	Amd. 15:	\$ (610,320)	(AV)
Amd. 18:	\$ 47,140	(AV)	Amd. 16:	\$ (167,950)	(AV)
Amd. 19:	\$ 27,700	(AV)	Amd. 22:	\$ (71,020)	(AV)
Amd. 20:	\$ 27,205	(AV))	Amd. 23:	\$ (73,760)	(AV)
Amd. 21:	\$ 38,770	(AV)	Amd. 26:	\$ (8,210)	(AV)
Amd. 24:	\$ 11,525	(AV)	Amd. 30:	\$ (35,390)	(AV)
Amd. 25:	\$ 20,675	(AV)	Amd. 31:	\$ (3,817,505)	(AV)
Amd. 27:	\$ 113,115	(AV)		\$ -	
Amd. 28:	\$ 15,535	(AV)		\$ -	
Amd. 29:	\$ 24,105	(AV)		\$ -	
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	\$ -		P2 Total:	\$ (5,844,300)	
P1 Total:	\$ 823,365	4%	P2 Balance	\$ 155,700	

## Deferred Maintenance and Capital Renewal Report

4/30/2019

CCR - UPE 773 , FY 17/18						
#	Project Description	Est. Cost	Final Cost	Bond Balance	Status	Date Complete
	UPE 773			\$ 2,760,605		
1	FACP Upgrades-PE/SN	\$ 5,745	\$ 5,745	\$ 2,754,860	Completed	30-Aug-17
2	PE Waterline N Upgrade	\$ 23,350	\$ 23,350	\$ 2,731,510	Completed	30-Aug-17
3	Chiller CH-1 and CH-2 Overhaul	\$ 125,480	\$ 101,650	\$ 2,629,860	Completed	30-Nov-17
4	LRC/Snell/PE Elev. Upgrades	\$ 231,315	\$ 231,315	\$ 2,398,545	Completed	29-Jun-18
5	CU Sidewalk Replacement	\$ 5,490	\$ 5,490	\$ 2,393,055	Completed	22-Sep-17
6	Well 1-4 Chlorine Syst. Upgrade	\$ 40,000	\$ 35,365	\$ 2,357,690	Completed	14-Dec-17
7	Purvine Chiller Compressor	\$ 25,000	\$ 26,597	\$ 2,331,093	Completed	9-May-18
8	Facilities Rollup Door (#3)	\$ 5,749	\$ 5,550	\$ 2,325,543	Completed	28-Mar-18
9	LRC Ventilator Heaters	\$ 7,350	\$ 7,135	\$ 2,318,408	Underway	15-Jan-19
10	Boivin Static Pressure	\$ 6,000	\$ 5,000	\$ 2,313,408	Completed	9-Apr-18
11	Athletics Exterior Upgrades	\$ 1,050,000	\$ 906,245	\$ 1,407,163	Completed	31-Dec-18
12	Purvine VFD's	\$ 10,000	\$ 9,655	\$ 1,397,508	Completed	27-Dec-18
13	Chiller Refrig. Monitor/Alarm	\$ 5,968	\$ 5,968	\$ 1,391,540	Completed	21-May-18
14	Athletics Hot Water Syst. Upgrade	\$ 134,020	\$ 136,370	\$ 1,255,170	Completed	31-Sept-18
15	Well 1 - Pump Replacement	\$ 35,000	\$ 24,570	\$ 1,230,600	Completed	21-Dec-18
16	Athletics West Side HC Entry	\$ 10,000	\$ 9,505	\$ 1,221,095	Completed	1-Mar-19
17	Powerplant Fall Protection	\$ 25,000	\$ -	\$ 1,196,095	Design	TBD
18	Purvine Geo Pump Replacement	\$ 25,000	\$ 18,765	\$ 1,177,330	Completed	23-Apr-19
19	Well 5 Rehabilitation	\$ 455,000	\$ -	\$ 722,330	Design	TBD
20	HX Geo Upgrades	\$ 345,500	\$ -	\$ 376,830	Design	TBD
21	Bottle Fill Upgrades	\$ 45,000	\$ -	\$ 331,830	Underway	TBD
22	Facilities Reroof	\$ 225,000	\$ -	\$ 106,830	Underway	TBD
23	Boivin HC Entry Door Upgrade	\$ 8,500	\$ -	\$ 98,330	Underway	TBD
24	Backflow Replacement (4)	\$ 15,000	\$ -	\$ 83,330	Pending	TBD
25	Chiller Plant - Bearing Replacement	\$ 8,500		\$ 74,830	Underway	TBD
26	Facilities HVAC Upgrade	\$ 75,000		\$ (170)	Pending	TBD
	Balance			\$ (170)		TBD

CCR - UPE , FY 19/20						
#	Project Description	Est. Cost	Project Cost	Bond Balance	Status	Date Complete
	UPE			\$ 2,591,025		
	Balance forward - UPE 773	\$ (170)	\$ -	\$ 2,590,855		
1	LRC Exterior Repairs	\$ 10,000	\$ -	\$ 2,580,855	Pending	TBD
2	Snowmelt Connections	\$ 45,000	\$ -	\$ 2,535,855	Design	TBD
3	Replace GEO Isolation Valves	\$ 140,000	\$ -	\$ 2,395,855	Pending	TBD
4	Athletics Entry Lobby DM (73%)	\$ 145,000	\$ -	\$ 2,250,855	Pending	TBD
5	Connection Power Plant Effluent/Geo HX	\$ 100,000	\$ -	\$ 2,150,855	Pending	TBD
6	Replace 4 FRP Pipe Elbows	\$ 45,000	\$ -	\$ 2,105,855	Pending	TBD
7	Replace Facilities MDP, Feeder, Secoundaries	\$ 137,500	\$ -	\$ 1,968,355	Pending	TBD
8	Boivin/Semon Vault, MDP, Feeders and Seco	\$ 440,000	\$ -	\$ 1,528,355	Pending	TBD
9	Athletics Roof	\$ 345,000	\$ -	\$ 1,183,355	Pending	TBD
10	Bldg. HX Replacement (5)	\$ 175,000	\$ -	\$ 1,008,355	Pending	TBD
11	Replace ME Bldg. 12KV Switch Gear	\$ 625,000	\$ -	\$ 383,355	Pending	TBD
12	Replace ME Bldg. Substations	\$ 225,000	\$ -	\$ 158,355		
13		\$ -	\$ -	\$ 158,355		
	Balance			\$ 158,355		



Note: Facilities Management is actively managing the DM list based on a recent comprehensive facilities system assessment completed by a third party engineering consulting firm and unexpected failures. Systems identified for immediate replacement, except those in Cornett Hall (currently under renovation) and Boivin Hall (currently in front of the legislature for a major renovation) will be prioritized first. At least \$1.0M will be held for FY 2020 projects. Systems eligible for replacement using the \$5.0M infrastructure bond approved by the legislature will first be funded through that project and then DM funds applied as necessary.

Identified Deferred Maintenance - Education & General						
#	Building	Other	MEP Systems	Exterior	Interior	Bldg. Total
1	Boivin	\$ 850,000	\$ 892,000	\$ 1,454,250	\$ 1,853,250	\$ 5,049,500
2	Dow Center	\$ 55,000	\$ 758,000	\$ 10,000	\$ 35,000	\$ 858,000
3	Facilities	\$ 825,000	\$ 425,000	\$ 770,000	\$ 245,000	\$ 2,265,000
4	LRC	\$ 1,100,000	\$ 930,000	\$ 185,000	\$ 300,000	\$ 2,515,000
5	Owens Hall	\$ 350,000	\$ 854,000	\$ 400,000	\$ 178,550	\$ 1,782,550
6	Power Plant C	\$ 905,000	\$ 85,000	\$ 80,000	\$ -	\$ 1,070,000
7	Purvine Hall	\$ 725,000	\$ 679,000	\$ 798,850	\$ 500,000	\$ 2,702,850
8	Semon Hall	\$ 850,000	\$ 404,000	\$ 500,000	\$ 325,000	\$ 2,079,000
9	Snell Hall	\$ 75,000	\$ 304,000	\$ 561,730	\$ 214,000	\$ 1,154,730
10	Portland-Metro	\$ 341,500	\$ 618,780	\$ 540,770	\$ 493,500	\$ 1,994,550
11	Campus	\$ 5,565,000	\$ 16,150,000	\$ 220,000		\$ 21,935,000
Total						\$ 43,406,180

Identified Deferred Maintenance - Auxiliary Services						
#	Building	Other	MEP Systems	Exterior	Interior	Bldg. Total
1	Athletics	\$ 675,000	\$ 854,000	\$ 285,000	\$ 1,000,000	\$ 2,814,000
2	Stadium/Track	\$ 1,075,000	\$ 235,000	\$ 600,000	\$ 424,000	\$ 2,334,000
3	Residence Hall	\$ 800,000	\$ 354,000	\$ 2,905,650	\$ 4,370,000	\$ 8,429,650
4	College Union	\$ -	\$ 404,000	\$ -	\$ 575,000	\$ 979,000
5	Village	\$ -	\$ 104,000	\$ 600,000	\$ -	\$ 704,000
6	Student Health	\$ 77,350	\$ 143,000	\$ 275,000	\$ 270,550	\$ 765,900
7		\$ -	\$ -	\$ -	\$ -	\$ -
Subtotals		\$ 2,627,350	\$ 2,094,000	\$ 4,665,650	\$ 6,639,550	\$ 16,026,550
Total		\$ 16,026,550				

Notes:

- 1) The Deferred Maintenance plan reflects known needs and will be updated as project pricing is finalized to meet institutional priorities or to support unforeseen emergencies.
- 2) Deferred Maintenance for OMIC campus is not included in analysis.
- 3) Costs do not include Furniture, Fixtures, Class equipment or IT Hardware.

## ATTACHMENT D

### Audit Status

#### **Internal Audit**

*(Prepared by Kernutt Stokes, LLP)*

Oregon Tech has contracted Kernutt Stokes LLP (KS) for internal audit services. KS reports directly to the Audit Committee of the Board of Trustees.

The FY 2019 Audit Plan was approved by the Audit Committee at its November 15, 2018 meeting and included several engagements for this fiscal year and potential engagements for the upcoming two to three years. The approved audits for the current fiscal year, and their status are as follows:

Internal Audit Projects Update	
Engagement	Status
Multi-year (2019-2022) Proposed Internal Audit Plan	Ready for Board approval
Monitor Fraud, Waste, and Abuse Ethics Hotline	Report included for Board review
Oregon Manufacturing Innovation Center (OMIC)	Estimated completion: early-June 2019
Athletics Fiscal Review	Estimated completion: June 2019
Prior Audit Follow-up	Report: Summer 2019

The Annual Risk Assessment and Audit Plan can be found on the Oregon Tech Internal Audit webpage <http://www.oit.edu/faculty-staff/internal-audit> or through the Finance and Administration homepage.

Internal Audit has prepared and included a multi-year audit plan for the Board's consideration and approval. This plan encompasses the proposed audits for the next three years, from July 2019 through June 2022. Internal Audit has worked with Management and the Board Liaison to identify the proposed audit engagements. Annually, the plan will be reevaluated by Internal Audit and Management for potential adjustment or change based on new priorities or risks.

Ongoing Internal Audit work includes the OMIC engagement, which is focused on procurement activities, expenditure review, research project oversight and walkthrough and tests of various policies and processes. Fieldwork was completed in February and detail test work was completed in April 2019. A report is expected to be issued for the Board in early June 2019. The Athletics Fiscal Review engagement began in April 2019 and is still in process. A report is estimated to be completed by end of June 2019. The audit encompasses testing of policies and procedures around fiscal controls, revenue producing contracts, handling of donor endowed funds for athletic purposes, travel expenses and reimbursements, and cash handling activities at athletic events.

Internal Audit is working with various departments to follow-up on implementation of prior audit issues and intended action plans. Internal Audit is currently working with the Financial Aid office, Business Affairs, and the Integrated Student Health Center on several prior audits and will report on the status or completion of specific recommendations for each project on a report to the board estimated to be completed during the summer of 2019. Internal Audit is also still engaged with Management regarding the Academic Affairs Workload Management audit which was previously referred to the Academic Quality and Student Success Committee for review. Once the Academic

Affairs Leadership has responded with an action plan to be implemented by Management, Internal Audit will report back to the Board.

Internal Audit monitors and performs case management for Oregon Tech's Fraud, Waste, and Abuse Ethics Line, engaging the university's General Council and other appropriate offices at Oregon Tech. The most current report log is available below; with dates representing fiscal years. Currently there is one open report which is being investigated by appropriate parties within the university. There have been a total of six reports made through the hotline since the start of fiscal year 2018/2019. The annual fiscal audit identified consistent knowledge of the Fraud, Waste and Abuse Ethics Hotline as an area for improvement. Management has worked with Internal Audit to develop processes for better communication and understanding of the purpose and role of the hotline within the university's control structure. Twice a year an email will be sent to all Oregon Tech staff communicating the purpose and process of the hotline. This information will also be communicated to students annually during orientation. Additionally, Internal Audit has issued a report, included in the Board materials, detailing some of the data collected in the last three years through the hotline. This annual report should aid and strengthen the Board's ability to understand and monitor the issues being communicated to the university.

Fraud, Waste, and Abuse Ethics Line Report Log			
Complaint Source	2017	2018	2019
Hotline	10	5	6
Direct to IA	0	0	0
Total	10	5	6
Issues Resolved			
Resolved	10	5	5
Open	0	0	1

The Finance and Facilities Committee, acting as the Audit Committee has an action item on its May 30, 2019 meeting agenda to approve a contract extension for Kernutt Stokes LLP through June 30, 2020. This extension is necessary to ensure internal audit services continue next fiscal year and allow for a deeper discussion by the Audit Committee on the scope and scale of internal audit services at the Committee's Fall 2019 meeting.

## **Annual Financial and Compliance Audit**

Internal year-end planning and year-end work have commenced. The financial and compliance audits are scheduled to be issued in December 2019.

Staff have in communication with CliftonLarsonAllen LLP (CLA) and have received the preliminary information requests. CLA is scheduled to perform on-site interim fieldwork the week of June 17, 2019. The Finance and Facilities Committee, acting as the Audit Committee has an action item on its May 30, 2019 meeting agenda to approve a contract extension for CLA continuing through FY 2021. This extension is necessary to ensure audit services for the current fiscal year and is in line with industry standard partner rotation and competitive bid processes.

The audit opinions, Annual Financial Report, Single Audit Report and results of the fiscal year will be presented as part of the Audit Committee's regularly scheduled first meeting of 2020.

The annual financial and compliance audit function tentative timeline for the fiscal and compliance audits for the year ending June 30, 2019:

- April – May 2019: Internal planning including all audit areas: financial reporting, federal financial aid, and Information Technology Services (ITS) portions of the audit; coordination and planning meetings with various campus departments
- May – June 2019: Auditors on-site conducting interim fieldwork for the financial and financial aid compliance audits;
- May – August 2019: Auditors conduct remote testing over ITS portion of audit (IT-related internal controls); year-end preparation
- June - July 2019: Fiscal year-end close, audit related schedules, financial statement drafting
- August – September 2019: Auditors conduct on-site final fieldwork; financial statement compilation and draft review
- September – November 2019: Auditors conclude testing off-site and audit wrap-up; finalize Annual Financial Report and Single Audit Report
- Audited financial information submitted to the State of Oregon on or before November 15, 2019

Timeline through report issuance includes:

- December 2019: Submission of audit report issuance to State for discretely presented component unit reporting
- First meeting in 2020: Presentation to Audit Committee (regularly scheduled Board meeting)

The VPFA Office oversees the progression and completion of the annual financial and compliance audits with work performed by the Business Affairs Office, Financial Aid Office, Human Resources Office, Information Technology Services, and Office of Sponsored Projects and Grants.

## ATTACHMENT E

### Quarterly Investment Report

### December 31, 2018

#### **Public University Fund**

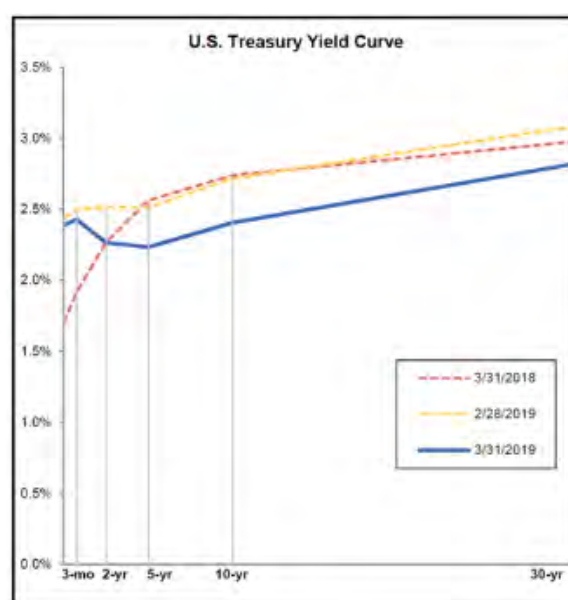
*(Prepared by the Public University Fund Administrator)*

Oregon Tech's operating assets are invested in the Public University Fund (PUF).

The PUF gained 1.7% for the quarter and 3.4% fiscal year-to-date through March 31, 2019. The PUF's three-year average return was 2.1%.

The Oregon Short-Term Fund (OSTF) returned 0.7% for the quarter, outperforming its benchmark by 10 basis points. The Core Bond Fund returned 2.2% for the quarter, underperforming its benchmark by 10 basis points. The investment yield on the PUF portfolio was 0.7% for the quarter.

In April, Oregon State Treasury fixed income portfolio manager, Tom Lofton, conducted a quarterly performance review with university staff. The fixed income markets posted strong returns during the quarter as short-term interest rates declined following the Federal Reserve's dovish comments. Segments of the yield curve remain inverted for a second consecutive quarter, particularly the six month to 5 year maturities. As depicted by the blue line in the graph right, the yield on the 3-month Treasury bill (2.39%) was higher than the 5 year Treasury note (2.23%).



The Core Bond Fund ended the quarter with a large underweight to agency mortgage-backed securities, compared to its benchmark, as Mr. Lofton concluded the risk/reward relationship was no longer compelling given the strong sector rally during the quarter. Mr. Lofton will seek opportunities to reposition assets into the agency mortgage-backed sector when valuations improve.

A factsheet detailing each investment pool's portfolio characteristics and market exposures is included with this report.

#### **Oregon Tech Quasi-Endowment Fund**

The Oregon Tech Quasi-Endowment assets gained 2.2% for the quarter and 3.8% fiscal year-to-date through March 31, 2019. The Oregon Intermediate-Term Pool outperformed its benchmark by 10 basis points over the quarter, and has underperformed its benchmark by 40 basis points fiscal year-to-date. The Endowment assets were valued at \$7,375,489 at the end of the quarter.



**Oregon Tech**  
**Investment Summary**  
**as of March 31, 2019**  
(Net of Fees)

	Quarter Ended 3/31/2019	Current Fiscal YTD	Prior Fiscal YTD	3 Yr Avg	5 Yr Avg	10 Yr Avg	Market Value	Actual Asset Allocation	Policy Allocation Range
<b>OIT Operating Assets Invested in Public University Fund</b>									
Oregon Short - Term Fund	0.7%	1.9%	1.2%	1.6%	1.2%	0.9%	\$ 9,405,206	36.7%	1
Benchmark - 91 day T-Bill	0.6%	1.7%	0.9%	1.2%	0.7%	0.4%			
PUF Core Bond Fund	2.2%	4.1%	-0.5%	N/A	N/A	N/A	16,211,216	63.3%	1
Blended Benchmark <sup>2</sup>	2.3%	4.3%	-0.6%	1.6%	2.7%	N/A			
<b>Public University Fund Total Return</b>	1.7%	3.4%	0.5%	2.1%			<u>\$ 25,616,422</u>	<u>100.0%</u>	
Public University Fund Investment Yield	0.7%	2.0%	1.5%	2.1%					
<b>OIT Endowment Assets</b>									
Oregon Intermediate-Term Pool	2.2%	3.8%	-0.3%	N/A	N/A	N/A	\$ 7,375,489	100.0%	
Benchmark - Bloomberg Barclays 3-5 Year Index	2.1%	4.2%	-0.6%	1.6%	1.9%	N/A			
<b>Total Endowment Assets</b>	2.2%	3.8%	-0.3%				<u>\$ 7,375,489</u>	<u>100.0%</u>	

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

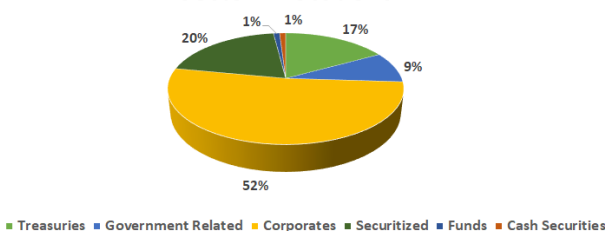
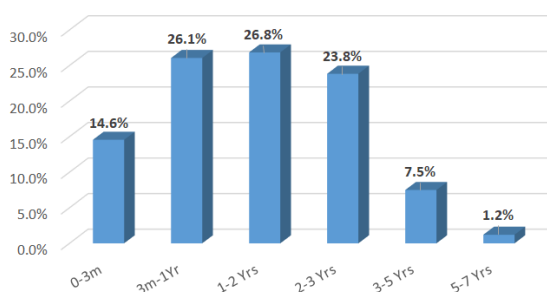
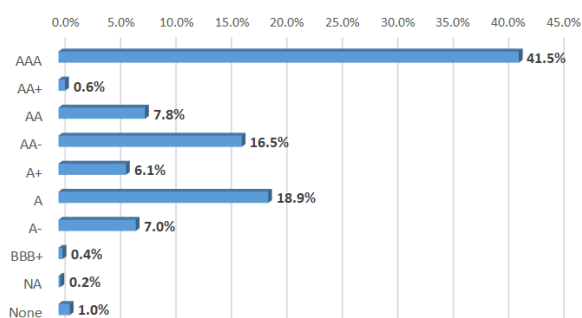
<sup>2</sup> Blended Benchmark Composition: 75% Bloomberg Barclay's Aggregate 3-5 Years Index, 25% Bloomberg Barclay's Aggregate 5-7 Years Index.

**Portfolio Characteristics**

Market Value 3/31/19	\$ 222,226,990
Weighted Average Credit Quality	AA
Book Yield (%)	2.79
Weighted Average Maturity (years)	1.15
Duration (years)	0.58
Spread Duration (rate)	0.92

**Top 10 Issuers**

United States Treasury	17.3%
JP Morgan Chase & Co	3.3%
Wells Fargo & Company	3.0%
Citigroup Incorporated	2.7%
Caterpillar Incorporated	2.3%
Barclays Plc	2.2%
Goldman Sachs Group Incorporated (The)	2.2%
American Express Credit Account Master Trust	2.1%
Chase Issuance Trust	2.0%
Bank Of Montreal	1.8%
<b>Total</b>	<b>38.9%</b>

**Sector Allocations****Maturity Breakdown****Credit Quality Distribution**

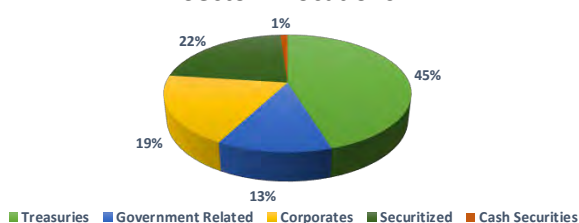
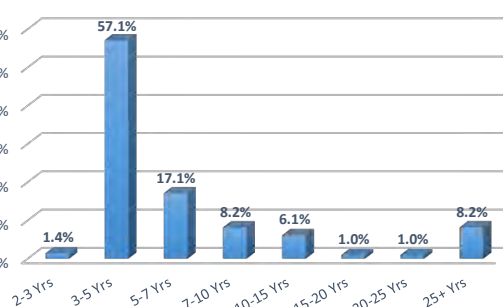
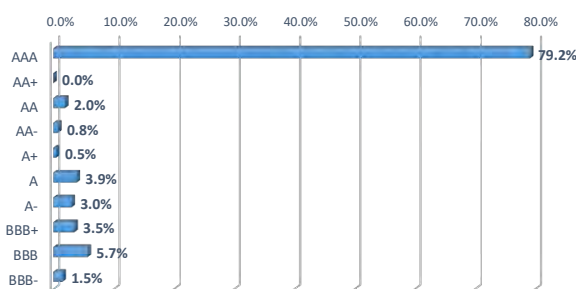
Source: Oregon State Treasury

**Portfolio Characteristics**

Market Value 3/31/19	\$ 383,039,971
Weighted Average Credit Quality	AA+
Book Yield (%)	2.71
Weighted Average Maturity (years)	4.54
Duration (years)	3.69
Spread Duration (rate)	2.31

**Top 10 Issuers**

United States Treasury	55.0%
Federal National Mortgage Association	5.7%
Federal Home Loan Mortgage Corporation	4.2%
Federal Farm Credit Banks Funding Corporation	2.2%
European Investment Bank	2.0%
FHLMC Multifamily Structured Pass Through K040	1.3%
FHLMC Multifamily Structured Pass Through K058	1.3%
Capital One Multi-Asset Execution Trust	1.2%
Oregon State Treasury (Oregon Short-Term Fund)	1.1%
Sherwin-Williams Company (The)	1.0%
<b>Total</b>	<b>75.0%</b>

**Sector Allocations****Maturity Breakdown****Credit Quality Distribution**

Source: Oregon State Treasury

**FY2019 Q3 MARKET COMMENTARY***(Prepared by Callan Associates, consultants to the Oregon Investment Council)***Macroeconomic Environment**

With the equity market falling by nearly 20% at one point during the month of December, the worst for the S&P 500 since 1931, suffice it to say that calendar year 2018 ended with a thud rather than a bang. However, just as we saw a snap-back from the drawdown in early calendar year 2018 (for different reasons), the market once again exhibited a far more “risk-on” mood in January 2019, paving the way for double-digit equity gains as well as robust returns across high yield, bank loans, and a variety of other “plus” sectors within fixed income.

So what changed? Not a whole lot. In hindsight, poor liquidity late in the fourth calendar quarter exacerbated the sentiment-driven sell-off in risk markets (high yield and leveraged loans in particular) while unexpectedly dovish comments from the Federal Reserve (Fed) in the early part of the calendar year acted as a catalyst for a swift reversal. While there is some evidence of softening conditions in the U.S., data do not suggest that a recession is imminent. Corporate fundamentals remain solid, and while after-tax profits moderated in the fourth calendar quarter, earnings per share was up 14% on a year-over-year (y-o-y) basis. Likewise, unemployment remains low at 3.8%, and wages are rising as average hourly earnings surprised on the upside with a 3.4% increase over the past 12 months (February), the fastest in a decade. Fourth calendar quarter gross domestic product (GDP) was revised down to 2.2%, but while “sluggish” may be an apt term, this pace is not of recessionary ilk (full calendar year GDP was 2.9%). Manufacturing showed signs of slowing, with the most recent Purchasing Managers’ Index (as of March) indicating that the US remains in expansionary territory (above 50) with the latest reading at 54.2. Consumer spending softened during the fourth calendar quarter and the first two months of the calendar year, but the consumer remains in good shape with household debt service as a percentage of disposable income at the lowest level in decades. And inflation remains benign, with the Consumer Price Index (CPI) up 1.5% in February (y-o-y), notably lower than the 2.5% read from just a few months ago as falling energy prices (Energy CPI: -5.1% y-o-y) weighed heavily on the headline number. The Core CPI measure (excluding food and energy) was up 2.1% while the Fed’s preferred inflation gauge, the Personal Consumption Expenditures Deflator, rose 1.8% over the trailing year.

In March, the Fed’s pause was expected, but its dovish language was not, leading to a dizzying plummet in U.S. Treasury yields. The Fed voted unanimously to leave rates unchanged at 2.25%-2.50% and further indicated that no hikes were likely for the remainder of the calendar year, while lowering expectations for calendar year 2019 GDP from 2.3% to 2.1%. Finally, balance sheet “normalization” (maintaining the size of the balance sheet by reinvesting proceeds from maturities) was escalated to September 2019, sooner than expected. The yield curve is flirting with inverted status, but as of calendar quarter-end the widely watched spread between the 2-year and 10-year Treasury was +14 basis points. An inversion has been an accurate harbinger of recession, albeit up to 20 months out. In a stark reversal from the fourth calendar quarter, Fed fund futures revealed a 65% probability of a Fed cut in 2019.

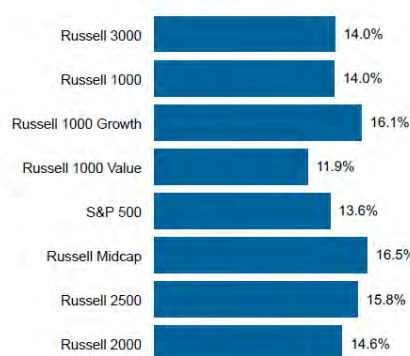
The picture is more worrisome overseas. With ambiguities regarding British Exit (Brexit), recession in Italy, and surprisingly weak manufacturing numbers out of Germany (Purchasing Manager’s Index 44.7), the European Central Bank (ECB) lowered its projections for euro zone GDP growth from 1.7% to 1.1%. It also indicated it would leave rates on hold at least through the end of the calendar year. Further, in early March the ECB announced a new bank lending program to support growth. Euro zone GDP grew 1.1% in the fourth calendar quarter (+1.6% y-o-y), and the Organization for Economic Co-operation and Development estimates growth of just 1% for calendar year 2019, down from 1.8%. In Germany, the yield on the 10-year government bond turned negative for the first time since late calendar year 2016 and closed the quarter at -

0.07%. China was also a worry—it lowered its growth target to 6.0%-6.5%, and the profits of industrial companies fell 14% in the first two months of calendar year 2019 versus one year ago, the worst since the Global Financial Crisis. (Spoiler: On April 1, 2019 China released its version of the Purchasing Manager's Index, beating expectations and hitting the highest level in eight months, thus tempering worries over a dramatic slowdown.)

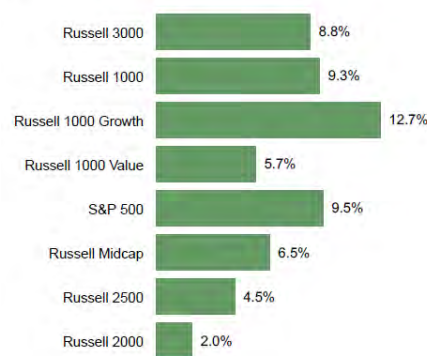
## Equity Markets Results

U.S. equity markets had no problem erasing the pain of the fourth calendar quarter as the S&P 500 rose 13.7% with double-digit gains across cap and style spectrums. On a relative basis, Growth outperformed Value (Russell 1000 Growth: +16.1% vs. Russell 1000 Value: +11.9%), Small Cap outperformed Large Cap (Russell 2000: +14.6% vs. Russell 1000: +14.0%), and virtually all sectors delivered double-digit results with the exceptions being Financials (+8.6%) and Health Care (+6.6%). Volatility returned to more normalized levels, with just a few trading days seeing market movement of more than 2% in either direction (versus nearly 20% in the fourth calendar quarter.)

U.S. Equity: Quarterly Returns



U.S. Equity: One-Year Returns



Non-U.S. developed (Morgan Stanley Capital Indices (MSCI) – Europe Australasia and Far East: 10.0%) and emerging market equities (MSCI Emerging Markets: +9.9%) also rebounded strongly in the first calendar quarter, but trailed their U.S. counterparts (and failed to make up for the pain felt in the fourth calendar quarter). The U.K. (+11.9%), Canada (+15.4%), and Italy (+14.6%) were among the standout performers, while Japan (+6.7%) was a laggard but positive nonetheless. Similarly, emerging market performance was robust across the board as China (+17.7%), India (+7.2%), Russia (+12.2%), and Brazil (+8.1%) recorded strong returns. Turkey's GDP dropped 3% y-o-y in the fourth calendar quarter amid economic and political woes and was the worst-performing country (-3.2%).

Global Equity: Quarterly Returns



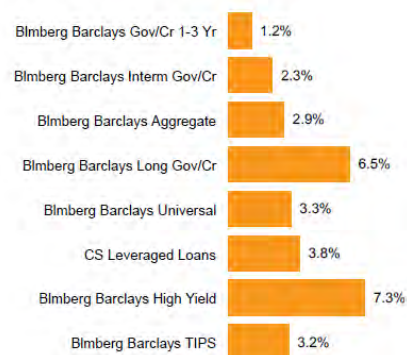
Global Equity: One-Year Returns



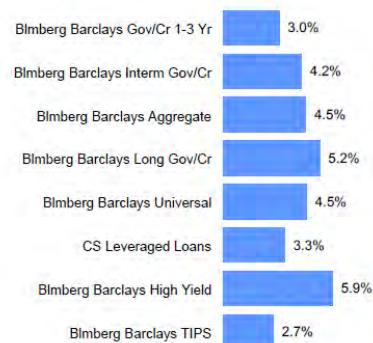
## Fixed Income Markets Results

In the U.S., the Bloomberg Barclays U.S. Aggregate Bond Index rose 2.9% for the quarter, with investment grade corporates (Bloomberg Barclays Corporate: +5.1%) up the most. Yields fell sharply in March as the market digested unexpectedly dovish comments from the Fed. The 10-year U.S. Treasury returned 2.8% and its yield closed the quarter at 2.41%, down nearly 30 basis points (bps) from calendar year-end and significantly from the multi-year high of 3.24% hit in early November. Portions of the yield curve inverted, but the widely watched spread between the 2- and 10-year Treasury note remained positive at 14 bps. The high yield corporate bond market (Bloomberg Barclays High Yield: +7.3%) soared and the sector's yield-to-worst ended the quarter at 6.4% after surging to nearly 8% in the fourth calendar quarter. Similarly, leveraged loans were up 4.0% after falling 3.5% (S&P Loan Syndications & Trading Association) in the fourth calendar quarter. While the fundamental picture for corporations remains intact, these returns were driven primarily by a strong technical tailwind on the back of a very weak December. Municipal bonds (Bloomberg Barclays Municipal Bond: +2.9%) outperformed U.S. Treasuries and were also helped by a favorable supply/demand backdrop. Municipal mutual funds absorbed roughly \$24 billion in inflows—the best first calendar quarter since data collection began in 1992.

U.S. Fixed Income: Quarterly Returns



U.S. Fixed Income: One-Year Returns



Overseas, yields across developed markets fell. The Global Aggregate Index rose 2.2% for the quarter on an unhedged basis. On a hedged basis, the Index gained 3.0%. The dollar appreciated modestly vs. the euro and yen, but lost ground vs. the U.K. pound and Canadian dollar. In Germany, the yield on the 10-year bond turned negative for the first time since late 2016 and closed the quarter at -0.07%. Emerging market debt also benefited from the reversal in risk appetite. The U.S. dollar-denominated JP Morgan Emerging Markets Bond Global Diversified Index gained 7.0% with none of the index's 60+ countries delivering a negative result. Local currency emerging market debt, as measured by the JP Morgan Global Bond Emerging Markets Diversified Index, was up a more modest 2.9%, with notable underperformers being Turkey (-10.2%) and Argentina (-10.5%).

## Other Assets Results

Real assets of all varieties enjoyed a strong first calendar quarter, perhaps none more than crude oil as the price of West Texas Intermediate extended over +30% through the end of March. Energy as a whole (measured by the Bloomberg Commodity Energy sub-index) was up nearly 16%, while commodities broadly produced a more modest positive return in calendar Q1 (Bloomberg Commodity Total Return Index: +6.3%) as gains in energy and metals were offset by negative returns for natural gas and the agriculture complex as a whole (Bloomberg Commodity Agriculture sub-index down -3.2%). Other yield-oriented real asset categories also saw healthy gains. Somewhat influenced by the buoyant price of oil (and equity markets as well), Master

Limited Partnerships (Alerian MLP Index: +16.8%) also enjoyed a strong start to the calendar year with the yield spread between the Alerian Index and the 10-year Treasury remaining fairly wide at +500 basis points. Both U.S. and Non-U.S. listed real estate saw double digit gains in calendar Q1 (Financial Times Stock Exchange (FTSE) National Association of Real Estate Investment Trusts (NAREIT) Equity: +16.3%; FTSE European Public Real Estate Association/NAREIT Global: +15.0%) as did listed infrastructure assets (DJ Brookfield Global Infrastructure: +15.7%).

### **Closing Thoughts**

With such a torrid start to the calendar year for broad asset classes following an almost equally disappointing end to calendar 2018, it will be very interesting to observe how investors react to the next series of potential market events. More periodic bouts of volatility seem almost inevitable, global growth concerns (particularly in Europe) are not going away, and of course there's the plodding and still undetermined outcome on a final Brexit deal. Thus, just as we have stated in the past, adherence to an appropriate and well-defined asset allocation remains the best course of action to manage the path to successful attainment of long term investment goals.



## **REPORT ITEM**

### **Agenda Item No. 3.3**

### **Fraud, Waste, Abuse, Ethics Hotline Annual Report**

#### **Summary**

Oregon Tech's internal audit firm, Kernutt Stokes, LLP, manages the university's Fraud, Waste and Abuse Hotline. On an annual basis this Internal Audit will provide to the Board of Trustees a report outlining the number and disposition of all reports to the Fraud, Waste and Abuse Hotline. These are also reported quarterly to the Board in the Internal Audit portion of the Finance and Administration Quarterly Dashboard's.

#### **Staff Recommendation**

This is a report item only, no action necessary.

#### **Attachment**

Fraud, Waste, Abuse, Ethics Hotline Annual Report



Fraud, Waste, Abuse, Ethics Hotline  
Annual Report  
May 6, 2019



**To:** Board of Trustees and Management of Oregon Tech

**From:** Internal Audit

**Date:** May 6, 2019

**Subject:** Fraud, Waste, Abuse, Ethics Hotline (Ethics Hotline) Annual Report

### ETHICS HOTLINE ANNUAL REPORT

#### BACKGROUND

Oregon Tech has a third-party anonymous hotline service, provided by EthicsPoint. An individual may contact the hotline service either by the toll-free phone or via the internet, 24 hours a day, 7 days a week. EthicsPoint immediately prepares a report for each contact and sends the report to Internal Audit where they are reviewed and directed to the appropriate Oregon Tech official for follow up. The Oregon Tech official receiving the report is required to provide resolution of each report to Internal Audit. Internal Audit tracks each report to ensure the assigned Oregon Tech official properly completes follow up actions. This report summarizes the activity of the Ethics Hotline for the fiscal years ending June 30, 2017, through June 30, 2019 (as reported through May 6, 2019).

#### OBJECTIVE AND SCOPE

The objectives of this review were to summarize the data related to the Ethics Hotline for the years ending June 30, 2017-2019.

#### SUMMARY

There have been 21 reports filed with Oregon Tech's third party hotline vender between the years ending June 30, 2017 and June 30, 2019. An investigation has been completed on 20 hotline reports with one recent case still pending (submission received April 18, 2019).

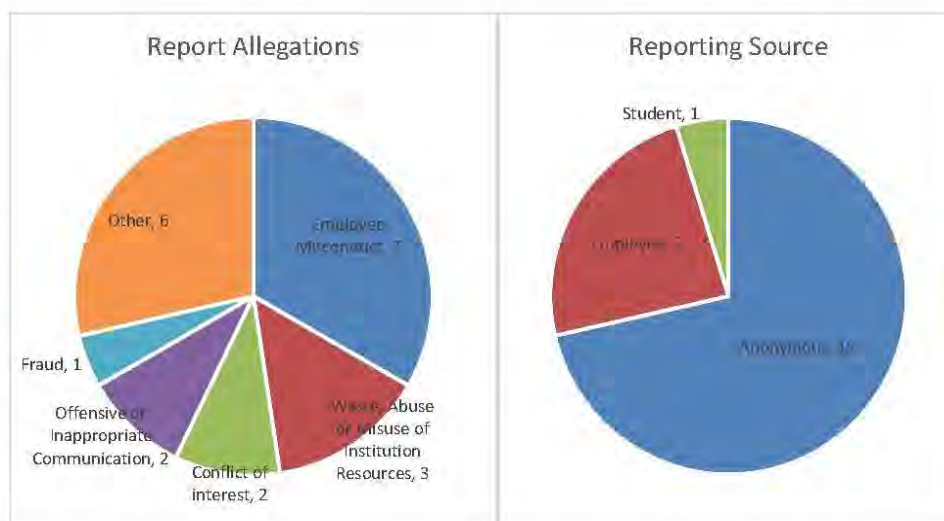
Complaint Source	6/30/2017	6/30/2018	6/30/2019
Hotline	10	5	6
Direct to IA	0	0	0
<b>Total</b>	<b>10</b>	<b>5</b>	<b>6</b>
Issue Status			
Resolved	10	5	5
Open	0	0	1

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### ETHICS HOTLINE DATA

As part of the University's collective efforts to achieve its strategic objectives, the University has a confidential reporting tool to assist students, faculty, staff and the general public in working to address concerns related to fraud, workplace misconduct, waste of University resources, and ethics violations all while cultivating a positive work environment. The Ethics Hotline is available either by toll-free phone or via the internet, 24 hours a day, 7 days a week. EthicsPoint, a third party provider, manages the hotline service. Upon submission of a report, an inquiry, or a concern, EthicsPoint immediately prepares a report for each contact and notifies Internal Audit. Internal Audit reviews all reports and forwards them to the University's General Counsel unless circumstances dictate another University official is more appropriate. The University official receiving the report is required to provide resolution of each report to Internal Audit. If additional information is required, Internal Audit can communicate with the reporter via EthicsPoint and vice versa which maintains anonymity, should the reporter wish to do so. As cases are resolved, reporters are notified that cases are closed. In some instances it may not be appropriate for the reporter to be notified of how an issue was resolved, particularly if it involves a personnel matter, but a reporter can be assured that the matter was received, investigated and resolved.

#### Report Allegations and Reporting Source



Employee Misconduct was the most reported concern during the last three years with 7 of the 21 total reports relating to this allegation. The "other" classification for report allegations includes one report from each of these six areas: falsification of contracts, reports or records, improper disclosure of



financial records, improper supplier/contractor activity, threat or inappropriate supervisor directive, inquiry, and other.

The Ethics Hotline allows individuals to remain anonymous if they choose. It also provides the individual the opportunity to identify themselves by either including their name or only including their connection to the University, such as a student or employee.

#### **Report Resolutions**

Internal Audit, with the help of Legal Counsel, has documented resolutions for 20 of the 21 reports received through the Ethics Hotline.

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## **ACTION ITEM**

### **Agenda Item No. 4.1**

## **Acceptance of the Internal Audit Risk Assessment and Approval of the Internal Audit Plan: 2019/2020 – 2021/2022**

### **Summary**

Internal Audit, has updated its annual Risk Assessment and Internal Audit Plan for Fiscal Year 2020. This Internal Audit Plan builds off of the first Internal Audit Risk Assessment developed during 2016, which included a deep-dive on university-wide departmental risks including questionnaires and follow up interviews. The 2020 assessment included insights derived from prior year audit outcomes and input from key members of management and the Board of Trustees audit liaison.

In order to maximize the use of Internal Audit resources the current risk assessment and identified audit engagements, include Tier I major engagements and Tier II minor engagements or ongoing process during FY19 a three-year audit plan was established. This three-year audit plan will be used for prioritizing FY 2020 internal audits as well as subsequent years audits. On an annual basis the Audit Committee establish an audit plan for the upcoming year. Each year the audit plan will be brought to the Audit Committee for approval after discussion and prioritization with management and the Board liaison.

The attached audit plan has been reviewed by the Chair of the Audit Committee and the VPFA.

The current year audit plan, outlined below, utilizes the Risk Assessment and discussion with management and the Board liaison.

#### **Major Engagements:**

- Sponsored Projects and Grant Administration
- Title IX
- Academic Agreements
- Auxiliary: Housing and Residence Life

#### **Minor Engagements:**

- Risk Assessment
- Monitor Fraud, Waste, and Abuse Ethics Hotline
- Prior Audit Follow-Up
- Board and Management Reporting



These audit engagements as well as risk factors will be discussed by Internal Audit during their report.

**Staff Recommendation**

Staff recommends that the Finance and Facilities Committee, acting as the Audit Committee, accept the Internal Audit Risk Assessment and approve the Internal Audit Plan: 2019/2020 – 2021/2022 as appended to this docket item.

**Attachments**

- [Audit Plan](#)
- [PowerPoint Presentation](#)



Internal Audit Plan:

2019/2020 – 2021/2022

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**INTERNAL AUDIT PLAN: 2019/2020 – 2021/2022**

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### **Internal Audit Plan Methodology**

The internal audit plan covers a three fiscal year period from July 1, 2019 through June 30, 2022. This plan includes internal audits selected based on the results of the risk assessments performed by Internal Audit (IA), input from various stakeholders and managers throughout the Institution, and input and approval from the Board of Trustees (Board). The internal audit plan is designed to direct IA resources in an effective and efficient manner.

IA uses a three-year risk assessment model, with annual updates based on targeted interviews with management and the Board, to prioritize audit coverage and ensure timely reviews of high exposure areas along with sufficient campus-wide attention.

IA performs three primary activities – audits, management advisory services, and investigations. IA's focus is to actively work within the Institution to assist management in addressing strategic, financial, operational, reputational, and compliance risks and exposures. IA focuses on both Institution-wide and department level processes and control systems. In order to focus audit resources, the work completed by other audit professionals and compliance officers across the Institution were considered in setting the overall audit plan and in planning the work conducted on any specific project. Additionally audits may be performed at the express request or instruction of the Board or Institution management.

The types of audits that can be performed by IA are as follows:

- Performance Audits - Examines the use of resources to evaluate whether they are being used in the most effective and efficient manner to fulfill the organization's mission and objectives. Performance audits may include some elements of the other audit techniques listed below.
- Financial Audits - Focuses on accounting and reporting of financial transactions, including commitments, authorizations, receipt, and disbursement of funds. This type of audit verifies that there are sufficient controls over cash and other assets, and that there are adequate process controls over the acquisition and use of resources.
- Compliance Audits - Reviews adherence to laws, regulations, policies, and procedures. Examples include federal and state law, Trustee policies, organizational, or departmental directives. Recommendations based on findings or observations typically call for improvements in processes and controls intended to ensure compliance with the regulations noted.

***Audit Plan for Fiscal Year 2019/2020:***

<b>Audit Unit</b>	<b>Audit Focus**</b>	<b>Budget*</b>	<b>Timeframe</b>	<b>Risk Ranking: Heat Map</b>
Risk Assessment and Audit Plan Update	Review risk assessment and update annual audit plan with targeted interviews with the Board and management as required by internal audit professional standards.	20	Spring 2019	N/A
Monitor Fraud, Waste, and Abuse Ethics Hotline	Monitor reports made to the Fraud, Waste, and Abuse Ethics Hotline, as well as items reported directly to IA during the annual risk assessment process or throughout the year. Coordinate with Human Resources, Institution management, and the Board for appropriate follow-up.	20	Year-round	N/A
Prior Audit Follow-up	Look back at audits performed in prior years to review progress and/or continued areas for improvement.	20	Year-round	N/A
Board and Management Reporting	Prepare monthly and quarterly reports and presentations for the board and management for audit statuses, issues encountered, decision needed, and actions taken.	40	Year-round	N/A
Sponsored Projects and Grant Administration	<u>Post-award review</u> : administration of post-award is clear and organized; policies and procedures exist and are followed; individuals in charge of post-awards understand compliance and reporting and receive sufficient training; financial interests of sponsored programs are disclosed timely and reviewed for conflicts of interest; sub-recipient relationships are appropriate and monitored by OT management; indirect costs are approved and charged as allowed under agreements.	250	Summer/ Fall/Winter 2019/2020	5
Title IX	<u>Title IX compliance</u> : policies and procedures; processing of complaints; communication and documentation; victim and whistleblower confidentiality	150	Winter/ Spring 2020	11

*Continued -*

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## OREGON TECH

Internal Audit Plan: 2019/2020 – 2021/2022

### *Audit Plan for Fiscal Year 2019/2020 (Continued):*

<b>Audit Unit</b>	<b>Audit Focus**</b>	<b>Budget*</b>	<b>Timeframe</b>	<b>Risk Ranking: Heat Map</b>
Auxiliary: Housing and Residence Life	<u>Controls over cash, revenues, expenditures, and sensitive information</u> : proper execution of contracts and agreements; cost reimbursement review; budget management, cash collection, protection of sensitive information.	100	Spring 2020	22
Academic Agreements	<u>Academic Agreement Management</u> : process for registering and placement of students, coordination of agreements.	150	Fall/Winter 2019/2020	27
	<b>Total Budget</b>	<b>750</b>		

# OREGON TECH

Internal Audit Plan: 2019/2020 – 2021/2022

## ***Tentative Audit Plan for Fiscal Year 2020/2021:***

<b>Audit Unit</b>	<b>Audit Focus**</b>	<b>Budget*</b>	<b>Timeframe</b>	<b>Risk Ranking: Heat Map</b>
Risk Assessment and Audit Plan Update	Review risk assessment and update annual audit plan with targeted interviews with the Board and management as required by internal audit professional standards.	20	Spring 2020	N/A
Monitor Fraud, Waste, and Abuse Ethics Hotline	Monitor reports made to the Fraud, Waste, and Abuse Ethics Hotline, as well as items reported directly to IA during the annual risk assessment process or throughout the year. Coordinate with Human Resources, Institution management, and the Board for appropriate follow-up.	20	Year-round	N/A
Prior Audit Follow-up	Look back at audits performed in prior years to review progress and/or continued areas for improvement.	20	Year-round	N/A
Board and Management Reporting	Prepare monthly and quarterly reports and presentations for the board and management for audit statuses, issues encountered, decision needed, and actions taken.	40	Year-round	N/A
Information Technology	<u>Cybersecurity</u> : policies and procedures; insurance coverage for incidents; incident response plan; super user access and change procedures.	250	Summer/Fall 2020	1
Business Affairs	<u>Fixed asset and inventory tracking</u> : campus or select department fixed asset tracking procedures; purchase and disposal policies and procedures; select department inventory tracking practices; fixed asset or inventory utilization.	150	Summer/Fall 2021	8
Auxiliary: Campus Dining	<u>Controls over cash, revenues, expenditures, and sensitive information</u> : proper execution of contracts and agreements; cost reimbursement review; budget management, cash collection, protection of sensitive information.	100	Spring 2021	22
Online Education	<u>Online course management</u> : Process for employee agreements, tracking and reporting results, accountability.	100	Winter/ Spring 2022	15
Campus Security	<u>Clery Act</u> : proper tracking and disclosure of campus crime statistics and security information	100	Winter/ Spring 2021	34
	<b>Total Budget</b>	<b>800</b>		

**OREGON TECH**

Internal Audit Plan: 2019/2020 – 2021/2022

***Tentative Audit Plan for Fiscal Year 2021/2022:***

<b>Audit Unit</b>	<b>Audit Focus**</b>	<b>Budget*</b>	<b>Timeframe</b>	<b>Risk Ranking: Heat Map</b>
Risk Assessment and Audit Plan Update	Review risk assessment and update annual audit plan with targeted interviews with the Board and management as required by internal audit professional standards.	20	Spring 2021	N/A
Monitor Fraud, Waste, and Abuse Ethics Hotline	Monitor reports made to the Fraud, Waste, and Abuse Ethics Hotline, as well as items reported directly to IA during the annual risk assessment process or throughout the year. Coordinate with Human Resources, Institution management, and the Board for appropriate follow-up.	20	Year-round	N/A
Prior Audit Follow-up	Look back at audits performed in prior years to review progress and/or continued areas for improvement.	20	Year-round	N/A
Board and Management Reporting	Prepare monthly and quarterly reports and presentations for the board and management for audit statuses, issues encountered, decision needed, and actions taken.	40	Year-round	N/A
Facilities Management	<u>Capital project management</u> : policies and procedures for determining project management team, solicitation and selection of subcontractors; management of project costs.	250	Summer/ Fall/Winter 2021/2022	9
Business Affairs, Procurement, Contracts, & Risk Management, Athletics	<u>Contract procurement, administration, and review</u> : policies and procedures around contracts with third-parties including: vendor selection, vendor evaluation, change orders, bidding, purchase thresholds, legitimate business purpose, and compliance with government regulations.	200	Fall/Winter 2021/2022	10

*Continued -*

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## OREGON TECH

Internal Audit Plan: 2019/2020 – 2021/2022

### *Audit Plan for Fiscal Year 2021/2022 (Continued):*

<b>Audit Unit</b>	<b>Audit Focus**</b>	<b>Budget*</b>	<b>Timeframe</b>	<b>Risk Ranking: Heat Map</b>
Business Affairs	<u>Accounts receivable</u> : policies and procedures around collections; compare to best practices and peer institutions review for uncollectable or delinquent accounts, write-offs, etc., for outside parties, students, etc.	100	Summer/Fall 2021	20
Auxiliary: Campus Book Store	<u>Controls over cash, revenues, expenditures, and sensitive information</u> : proper execution of contracts and agreements; cost reimbursement review; budget management, cash collection, protection of sensitive information.	100	Spring 2021	22
	<b>Total Budget</b>	<b>750</b>		

\* Budgeted hours are approximate and may change depending on project scope to be determined by IA, Institution management, and the Board. Hours shown are provided for planning purposes.

\*\* In selecting specific audit projects for inclusion in the audit plan, emphasis was placed on both providing coverage to the Institution's top risks, sufficient campus-wide attention, as well as to requests from Institution management and the Board. Some audits may carryover for completion into subsequent years depending on the optimal time for review. This is part of a normal audit process where audits begun in the last few months of the year are completed and issued early in the following year.

## **Audit Risk Methodology**

The potential audits were evaluated based on the impact, likelihood, and velocity that each audit risk would represent to the Institution based on standard internal audit practices. Each audit was plotted on a heat map (see page 8). Below is the criteria used to make those evaluations:

**Likelihood:** The chance that a risk could occur and impact the Institution. Likelihood is represented by the vertical axis of the heat map. Likelihood is determined and evaluated based on the following factors:

<b>Descriptor</b>	<b>Frequency</b>		<b>Probability</b>
Almost Certain	Immediate	Very often or expected	90% chance
Likely	<= 3 months	Often or multiple times per year	60%-90% chance
Possible	12 months	Periodically or annually	30%-60% chance
Unlikely	24 months	Occasionally or bi-annually	10%-30% chance
Rare	60 months	Rarely or remote possibility	<10% chance

**Velocity:** The speed at which a risk can occur and have a material impact on the Institution. Velocity is represented by the size of the point plotted on the heat map such that the larger the point, the faster the potential onset of the risk. Velocity is determined and evaluated based on the following factors:

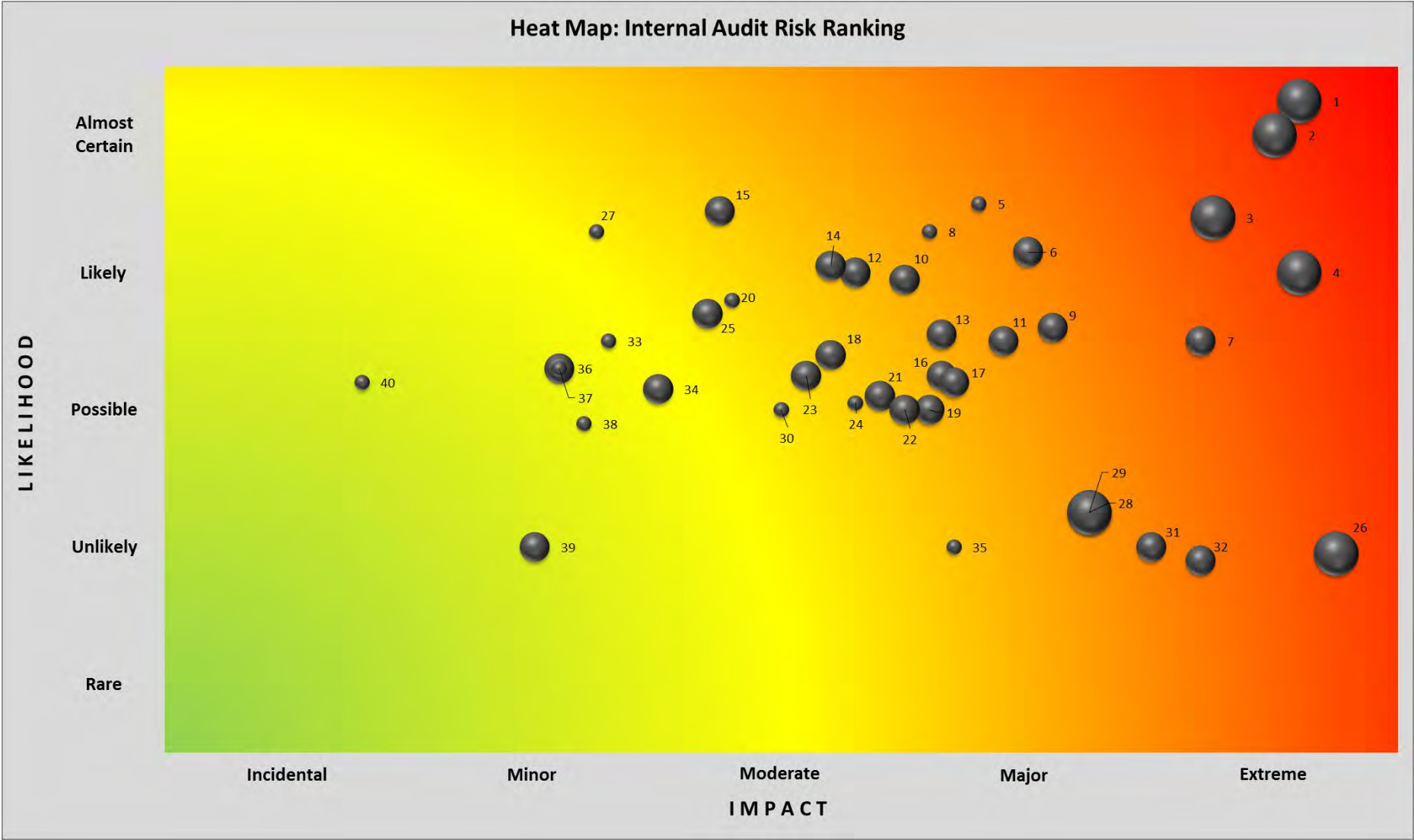
<b>Descriptor</b>	<b>Speed</b>	<b>Time Period</b>
Fast	Rapid or instantaneous onset with little or no warning	Occurs within hours or a few days
Moderate	Quick onset with some warning requiring a response	Occurs in a matter of a couple of weeks or months
Slow	Slow onset with enough warning to attempt remedy	Occurs over many months or years

# OREGON TECH

## Internal Audit Plan: 2019/2020 – 2021/2022

**Impact:** The extent of the consequences a risk could have on the Institution. Impact is plotted on the horizontal axis of the heat map. Impact is determined and evaluated based on the following factors:

Descriptor	Strategic	Operational	Compliance	Financial	Reputational	Safety
Extreme	Loss of confidence by all stakeholder groups. Potential closing of Institution.	Enterprise wide. Inability to continue normal operations across entire Institution. Multiple board members or senior leaders leave.	Board and/or management indictments. Significant prosecution and fines. Large scale legal action. Regulatory sanctions.	Financial cost or lost opportunity greater than \$5M	Significant and long-term national negative media coverage. Major loss of market share.	Loss of life
Major	Loss of confidence by two or more stakeholder groups. Multiple changes in senior leadership. Significant changes to Institution's strategic plan. Potential closing of multiple Institution branches or services.	Significant interruptions to Institution operations. Some senior leaders leave. High turnover of experienced staff. Not perceived as an employer of choice.	Management challenges. Large legal liabilities. Reports to regulators requiring major corrective action. Regulatory fines.	Financial cost or lost opportunity between \$1M - \$5M	Substantial state-wide media coverage. Potentially temporary or remediable situation. Significant loss of market share.	Permanent or significant injury
Moderate	Loss of confidence by more than one stakeholder group. Changes in senior leadership or staffing. Significant changes to Institution's execution of strategic plan.	Moderate interruptions to Institution operations. Widespread staff morale problems and high turnover.	Review of management decisions. Legal action considered or reserved for. Report of breach to regulator with immediate corrective action implemented. Regulatory investigation.	Financial cost or lost opportunity between \$100K - \$1M	Minor local media coverage. Likely temporary and remediable. Potential harm to market share.	Minor injury
Minor	Loss of confidence by one stakeholder group. Refinements or adjustments to Institution's strategic plan and/or execution.	Minor interruptions to Institution operations. General staff morale problems and increasing turnover.	Management unaffected. Minimal liabilities. Reportable incident to regulator with no follow-up required. Increased regulatory attention.	Financial cost or lost opportunity between \$25K - \$100K	Local media coverage easily remedied. No harm to market share.	Chance of injury and perception of danger
Incidental	Minor concern by 1 or more stakeholder groups. Minimal or no changes to Institution plans.	Minimal or no interruption to Institution operations. Isolated staff dissatisfaction.	Minimal or no liabilities. Not reportable to regulator. No regulatory impact.	Financial cost or lost opportunity less than \$25K	No impact	No injuries, perception of safety



# OREGON TECH

## Internal Audit Plan: 2019/2020 – 2021/2022

The table below represents the potential audits to be conducted by IA. To help identify potential projects, internal audits have been broken into two categories, Tier 1 and Tier 2. Tier 1 audits are larger projects identified as having high risk in the annual risk assessment, or areas specifically requested for review by the Board or Institution management. Tier 2 audits are smaller projects that can be either one-off or of a recurring nature. IA recommends a mixture of Tier 1 and Tier 2 audits each year to provide optimum levels of coverage.

Audit Unit(s)	Audit Focus	Description of Audit	Estimated Budget	Tier 1/ Tier 2	Risk Ranking: Heat Map
Information Technology	Cybersecurity	Policies and procedures; insurance coverage for incidents; incident response plan; super user access and change procedures.	150-250	Tier 1	1
Information Technology	Business email compromise	Policies and procedures in place; incident response plan; training; survey staff and faculty regarding understanding and response to an incident.	90-150	Tier 2	2
Information Technology	Information systems implementation	Policies and procedures related to new information system purchase or development including testing of outputs, appropriate training, support, and authorizations of data access.	150-250	Tier 1	3
Information Technology	Disaster recovery	Review existing policies and procedures for effectiveness; review modifications and communication of the plan to campus; adequate system redundancy; sufficient backups; adequate emergency operations center; clearly defined authority and responsibility; review previous incidents.	90-150	Tier 2	4
Sponsored Projects and Grant Administration	Post-award review	Administration of post-award is clear and organized; policies and procedures exist and are followed; individuals in charge of post-awards understand compliance and reporting and receive sufficient training; financial interests of sponsored programs are disclosed timely and reviewed for conflicts of interest; sub-recipient relationships are appropriate and monitored by OT management; indirect costs are approved and charged as allowed under agreements.	150-250	Tier 1	5
Procurement, Contracts, & Risk Management	Vendor selection, evaluation, and review	Policies and procedures around contracts with third-parties including: vendor selection, vendor evaluation, and vendor review.	90-150	Tier 2	6

Continued -

# OREGON TECH

## Internal Audit Plan: 2019/2020 – 2021/2022

Audit Unit(s)	Audit Focus	Description of Audit	Estimated Budget	Tier 1/ Tier 2	Risk Ranking: Heat Map
Human Resources and Affirmative Action, Campus Security	Sexual assault and harassment on campus	Policies and procedures related to reporting and investigation of incidents; mechanisms for reporting of incidents currently in place; training for staff, faculty and students	90-150	Tier 2	7
Business Affairs	Fixed asset and inventory tracking	Campus or select department fixed asset tracking procedures; purchase and disposal policies and procedures; select department inventory tracking practices; fixed asset or inventory utilization.	90-150	Tier 2	8
Facilities Management	Capital project management	Policies and procedures for determining project management team, solicitation and selection of subcontractors; management of project costs.	150-250	Tier 1	9
Business Affairs, Procurement, Contracts, & Risk Management	Contract procurement, administration, and review	Policies and procedures around contracts with third-parties including: change orders, bidding, purchase thresholds, legitimate business purpose, and compliance with government regulations.	150-250	Tier 1	10
Title IX	Title IX compliance	Policies and procedures; processing of complaints; communication and documentation; victim and whistleblower confidentiality	90-150	Tier 2	11
Information Technology	Protection of confidential information and personally identifiable information	Review policies and procedures for personal information protection and control; review access and security responsibilities of those in charge of confidential information; review reporting of potential information breaches.	90-150	Tier 2	12
Athletics	NAIA compliance	Policies and procedures; student athlete eligibility; academic compliance; off-campus recruiting; award and distribution of financial aid; sports camps, practices, travel regulations.	90-150	Tier 2	13
Sponsored Projects and Grant Administration	Compliance and fiscal controls	Review policies and procedures for payroll and effort certification, allowable costs, cost transfers, program income, sub-recipient monitoring, etc.	150-250	Tier 1	14
Online Education	Online course management	Process for employee agreements, tracking and reporting results, accountability.	90-150	Tier 2	15

Continued -

# OREGON TECH

## Internal Audit Plan: 2019/2020 – 2021/2022

Audit Unit(s)	Audit Focus	Description of Audit	Estimated Budget	Tier 1/ Tier 2	Risk Ranking: Heat Map
Budget and Resource Planning	Lottery funds	Administration of lottery funds is well organized and defined; policies and procedures are in place, current, and effective; OT is providing accurate and timely lottery fund reporting to the state; allocation process is well-documented and appropriate review and approval is in place; appropriate budgeting and accounting for lottery fund allocations is in place.	90-150	Tier 2	16
Alumni Relations/Oregon Tech Foundation	Donor funds	Use of gifts and compliance with donor intent across campus organizations	150-250	Tier 1	17
Athletics	Administrative review	Policies and procedures; contract administration; cash collection; student athlete eligibility; travel safety; insurance coverage; medical evaluation policies; financial aid distribution and communication.	90-150	Tier 2	18
Human Resources and Affirmative Action	Performance reviews	Process for faculty and administrative performance reviews; alignment with pay increases and promotions.	90-150	Tier 2	19
Business Affairs	Accounts receivable	Policies and procedures around collections; compare to best practices and peer institutions review for uncollectable or delinquent accounts, write-offs, etc., for outside parties, students, etc.	90-150	Tier 2	20
Athletics, Financial Aid	Athletic scholarships	Review processes for awarding of student athlete aid to ensure compliance with all applicable laws and campus guidelines, review equity and consistency of awards given.	90-150	Tier 2	21
Auxiliaries: Book Store	Fiscal review	Proper execution of contracts and agreements; cost reimbursement review; budget management; cash collection controls.	90-150	Tier 2	22
Auxiliaries: Campus Dining	Fiscal review	Proper execution of contracts and agreements; cost reimbursement review; budget management; cash collection controls.	90-150	Tier 2	22
Auxiliaries: Document Resource Center	Fiscal review	Proper execution of contracts and agreements; cost reimbursement review; budget management; cash collection controls.	90-150	Tier 2	22

Continued -

# OREGON TECH

## Internal Audit Plan: 2019/2020 – 2021/2022

Audit Unit(s)	Audit Focus	Description of Audit	Estimated Budget	Tier 1/ Tier 2	Risk Ranking: Heat Map
Auxiliaries: Housing and Residence Life	Fiscal review	Proper execution of contracts and agreements; cost reimbursement review; budget management; cash collection controls.	90-150	Tier 2	22
Human Resources and Affirmative Action	Pay equity	Review of pay equity study related to faculty and review of internal administrative pay equity study.	90-150	Tier 2	23
Human Resources and Affirmative Action	Payroll	Salary classifications and benefits; pay compliance with salary classifications assigned to staff; benefits provided to eligible employees; review active and inactive employee listing.	90-150	Tier 2	24
Campus Life & Multicultural Inclusion	International student services	Review compliance with international student regulations, laws, and other guidelines.	90-150	Tier 2	25
Emergency Management	Emergency response plan	Internal, administrative, compliance, and operational controls over the campus-wide emergency operations plan and related management activities, including training and drills.	90-150	Tier 2	26
Academic Agreements	Academic agreement management	Process for registering and placement of students, coordination of agreements.	90-150	Tier 2	27
College of Engineering Technology & Management	Student safety and legal compliance	Federal grant compliance, environmental, health, and safety compliance, business operations	90-150	Tier 2	28
College of Health, Arts, and Sciences	Student safety and legal compliance	Federal grant compliance, environmental, health, and safety compliance, business operations	90-150	Tier 2	29
Retention, Admissions	Enrollment and yield rates	Review procedures around tracking of enrollment data; review policies and procedures around student applications and admissions	150-250	Tier 1	30

Continued -



# OREGON TECH

## Internal Audit Plan: 2019/2020 – 2021/2022

Audit Unit(s)	Audit Focus	Description of Audit	Estimated Budget	Tier 1/ Tier 2	Risk Ranking: Heat Map
Facilities Management	Hazardous materials management	Risks related to hazardous material handling have been analyzed, identified, and addressed; policies and procedures exist, are appropriate, and are followed; appropriate controls are in place; OT has established HAZMAT communication documents and training; the appropriate permits are in place; hazardous material inventory is monitored, properly stored, and properly disposed; effective emergency plans are in place for spills or exposure.	90-150	Tier 2	31
Information Technology	EITA and GDPR compliance and training	Review compliance with Electronic Information Technology Accessibility, and European General Data Protection Regulations; analyze steps being taken to become compliant and risks analyzed as any result of non-compliance.	90-150	Tier 2	32
Sponsored Projects and Grant Administration	Pre-award review	Review for compliance with federal Responsible Conduct of Research documentation and training; review for appropriate training and administration of conflict-of-interest statements; review other potential training needed such as human-research subject protection, animal-research subject protection, suspension and debarment.	90-150	Tier 2	33
Campus Security	Clery act	Proper tracking and disclosure of campus crime statistics and security information	90-150	Tier 2	34
Strategic Partnerships	Alliances and affiliations	Review of policies and procedures around strategic partnerships with third-party affiliates; review potential conflicts of interest and compliance with all state and federal laws.	150-250	Tier 1	35
Human Resources and Affirmative Action	Timekeeping	Compliance with policies and procedures related to timekeeping of student employees; reconcile disbursements to active employee listing; review pay rates for compliance with policy.	90-150	Tier 2	36
Campus Life & Multicultural Inclusion	Registered Student Organizations	Ascertain the effectiveness of operational, administrative, and financial controls related to student organization activities and to ensure compliance with relevant governmental regulations, and campus directives.	90-150	Tier 2	37

Continued -

# OREGON TECH

## Internal Audit Plan: 2019/2020 – 2021/2022

<b>Audit Unit(s)</b>	<b>Audit Focus</b>	<b>Description of Audit</b>	<b>Estimated Budget</b>	<b>Tier 1/ Tier 2</b>	<b>Risk Ranking: Heat Map</b>
Facilities Management	ADA accessibility and compliance	Ascertain the effectiveness of existing policies and procedures related to ADA compliance and to determine the adequacy of controls over related processes to ensure compliance with relevant governmental regulations, and campus directives.	90-150	Tier 2	38
Campus Life & Multicultural Inclusion	Study-abroad program management	Review study-abroad and exchange programs offered to students are selected, monitored, and administered according to OT guidelines; fiscal administration of international programs is in accordance with regulatory and OT guidelines	90-150	Tier 2	39
Office of the Vice President for Finance & Administration	Cashiering	Review cash receipts and business processes, policies, and procedures; accountability for cash is timely; deposits are accurate; system access is controlled; appropriate segregation of duties in place.	90-150	Tier 2	40

# KERNUTTSTOKES

## *Internal Audit Update*

*May 30, 2019*

### Internal Audit Update Agenda

- Audit Projects Update
- Fraud, Waste, and Abuse Ethics Hotline Update
  - 3 year report for Board included in packet
- Multi-Year Audit Plan
  - Full report included in Board packet
    - 2019/2020 – final plan for Board approval
    - 2020/2021 & 2021/2022 – tentative plans for Board approval
- Prior Audit - Update

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## Audit Projects Update

- Oregon Manufacturing Innovation Center (OMIC):

- Fieldwork completed in February in Scappoose
- Detail testing completed in April
  - Procurement activities
  - Research projects oversight
  - Policies and procedures review
- Report for Board – Anticipated issuance in early-June

- Athletic Fiscal Review:

- Fieldwork in April
- Testing:
  - Policies and procedures review
  - Revenue producing contracts
  - Donor endowed funds for athletic purposes
  - Travel expenses for athletic events
  - Cash handling at athletic events

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## Fraud, Waste, and Abuse Ethics Hotline Update

- Annual Report – Included in Board Packet
- Status Update
  - 6 cases opened through hotline in 2018/2019
    - 5 resolved and closed
    - 1 open and being reviewed/investigated (submitted late April 2019)
  - Three-year case log status (fiscal year):

Complaint Source	2017	2018	2019
Hotline	10	5	6
Direct to IA	0	0	0
<b>Total</b>	<b>10</b>	<b>5</b>	<b>6</b>
Issue Status			
Resolved	10	5	5
Open	0	0	1

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## Multi-Year Audit Plan

- Full Report Included in Board Packet
- Utilized prior risk assessments and coordinated with Management and Audit Committee Chair to update risks
- Audit Plan for 2019/2020 for Board Approval
- Tentative Audit Plans for 2020/2021 & 2021/2022 for Board Approval
  - To be re-evaluated by IA, Management, and Audit Committee Chair annually for new or updated risks.
- 40 potential audits evaluated by risk and plotted on heat map

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## Multi-Year Audit Plan

2019/2020 Audit Plan:

- **Risk Update and Board/Management Reporting** – 60 Hours
- **Monitor Fraud, Waste, and Abuse Ethics Hotline** – 20 Hours
  - Monitor reports made to hotline as well as items reported directly to IA.
  - Coordinate with General Council for appropriate follow-up.
- **Prior Audit Follow-up** – 20 Hours
- **Sponsored Projects and Grant Administration** – 250 Hours
  - Post-award review: Review policies and procedures, compliance and reporting, conflicts of interest, sub-recipient relationships, indirect costs allowed under agreements.
- **Title IX** – 150 Hours
  - Policies and procedures, processing complaints, communication and documentation, victim and whistleblower confidentiality.

*Continued –*

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## Multi-Year Audit Plan

### 2019/2020 Audit Plan (Continued):

- **Housing and Residence Life** – 100 Hours
  - Fiscal Review: Proper execution of contracts and agreements, cost reimbursements, budget management, cash handling, protection of sensitive information, policies and procedures.
- **Academic Agreements** – 150 Hours
  - Registering and placing students, coordination of agreements.

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## Prior Audit - Update

- Internal audit in contact with:
  - Financial Aid Office
  - Business Affairs Office
  - Integrated Student Health Center
- Report to Board – Anticipated in Summer 2019
- Faculty Workload Management (2017/2018 Audit):
  - Management responses still pending

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# Questions?

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## **ACTION ITEM**

### **Agenda Item No. 4.2**

#### **Financial Statement Audit and Federal Single Audit Contract Extension – CliftonLarsonAllen, LLP**

##### Summary

Oregon Tech selected CliftonLarsonAllen, LLP (CLA) as its financial statement and Federal Single Audit external auditors. This contract is a three year contract with four successive single year extensions available to the university. The contract's original term concludes on May 31, 2019. CLA was familiar with Oregon Tech as it had a previous contract with the Oregon University System to provide similar services for the system and its component units.

As a matter of effective governance, auditors reports to the Board of Trustees Audit Committee. The Chair of Finance and Facilities Committee, acting in their capacity as the Chair of the Audit Committee, serves as the Board's liaison to interface with the auditors on behalf of the Board. Functionally, the control environment of the university is the responsibility of the Vice President of Finance and Administration and thus the VPFA is the functional lead with external auditors.

The President, Vice President of Finance and Administration and Board Secretary met with the Chair of the Finance and Facilities Committee in April to determine the Board's preferred next steps regarding financial statement and federal audits. These include seeking a competitive bid process or to amend the current contract to extend the agreement with CLA. Given timing it would be difficult to go through a competitive bid process and successfully conclude the current fiscal year audit.

In agreement from unanimous advice from staff, it was determined by the Chair that the best course of action was to extend the current agreement by three years. This determination is in congruence with industry norms in terms of audit relationships and meets the functional needs of the university given significant turnover within the Business Affairs Office.

Industry norms indicate a five to seven year audit relationship between a university/entity and a single partner or firm is typical. At the end of such a term it would be advisable for the university to issue an RFP for audit services in order to test the market for price and service levels. If the incumbent audit firm were to be selected, it would be advisable to rotate audit partners and teams in order to ensure diverse perspectives and that no undue relationships are coloring audit opinions transmitted to the Board. If the Board elects to extend the current audit agreement during the last year of audit services a competitive RFP process will be held.

There has been significant turnover in the Business Affairs Office, including a restructuring of the leadership within the unit and recent appointment of an Assistant Vice President for Financial Operations. The changes in business office leadership and accounting teams would strongly benefit from an audit team which is experienced with Oregon Tech and its history. CLA's unique position having served as the auditors for OUS and Oregon Tech position it as the only firm in the market able to do so.



Staff has negotiated with CLA to extend its current contract, including the current terms and conditions for an additional three years at a nominally adjusted rate reflecting inflation. This rate matches or is substantially similar to that charged to other similar public institutions in the state by CLA or other regional audit firms.

**Recommendation**

Staff recommends the Finance and Facilities Committee, acting as the Audit Committee, authorize staff to execute a contract extension with CliftonLarsonAllen, LLP for a duration of three-years beginning with the 2019 Fiscal year and concluding with the 2021 Fiscal Year.

## **ACTION ITEM**

### **Agenda Item No. 4.3**

### **Internal Audit Contract Extension**

#### **Summary**

When establishing itself as an independent university, Oregon Tech's Board of Trustees elected to use an external firm to provide internal audit services. Kernutt Stokes, LLP, a professional audit firm based in Eugene, Oregon was selected as the vendor of choice. Internal Audit reports to the Board of Trustees Audit Committee, with the Chair of Finance and Facilities Committee acting in their capacity as the Chair of the Audit Committee, as the Board's liaison to Internal Audit. Functionally Internal Audit reports to the Vice President of Finance and Administration.

The original term of the Kernutt Stokes contract was a single-year contract, ending June 30, 2017 with the ability to extend the contract for two additional single-year terms, concluding at the end of this fiscal year, June 30, 2019. The original contract has reached the end of its term. The President, Vice President of Finance and Administration and Board Secretary met with the Chair of the Finance and Facilities Committee in April to determine the Committee's preferred next steps, seek a competitive bid process, amend the current contract to extend the agreement with Kernutt Stokes, LLP or insource internal audit.

It was determined by the Chair that the best course of action was to extend the current agreement by one year, allow for a discussion in the fall on the scope and scale of internal audit services necessary and determine the best long-term course of action.

As such, staff has negotiated terms of a one-year extension of internal audit services using the same scope and terms and conditions as are currently in place with Kernutt Stokes. As Internal Audit reports directly to the Board, staff is seeking formal action of the Board to authorize the appointment of Kernutt Stokes for an additional one-year term to perform internal audit services for Oregon Tech.

#### **Recommendation**

Staff recommends the Finance and Facilities Committee, acting as the Audit Committee, authorize staff to execute a contract with Kernutt Stokes, LLP for a one-year contract internal audit services beginning July 1, 2019 and ending June 30, 2020.

## **ACTION**

### **Agenda Item No. 4.4**

## **Request to Recommend the Full Board Approve 2019-20 Tuition and Fees and Authorize Staff to Forward both to HECC**

### **Background**

A primary responsibility of the Oregon Tech Board of Trustees is to establish tuition and mandatory enrollment fees each year. Oregon Revised Statute (ORS) 352.102 outlines the Board's responsibilities related to tuition and mandatory enrollment fees. This ORS was substantially altered during the 2018 Legislative Session and stipulates that the Governing Board shall:

- establish a collaborative and inclusive process for determining tuition and mandatory enrollment fees,
- requires the university to establish a written process describing the role of an advisory board and its relationship to the president and the university.
- outlines specific information and analysis which must be presented to the advisory board
- request the President transmit a joint tuition and fee recommendation, including both the President's and the recognized student government's tuition and fee recommendations or any minority report,
- stipulates limitations on authority to adjust tuition and mandatory enrollment fees to increases at or below 5% without prior authorization from the HECC or legislature, and
- limit its ability to delegate the responsibility to set tuition and mandatory enrollment fees.

In response to the statutory requirements outlined above, the Oregon Tech Board of Trustees, adjusted its through its Policy on Resident Undergraduate Tuition and Mandatory Enrollment Fee Process to be in compliance with ORS 352.102 and the bill, House Bill (HB) 4141 which adjusted its structure. This policy establishes the Tuition Recommendation Committee (TRC) as the university's advisory board for developing tuition recommendations, as well as a tuition setting process and policy framework, specified in ORS 352.102, Section 5.1 as follows:

The Tuition Recommendation Committee shall meet at least twice between January and February prior to providing the President written recommendations on proposed tuition and mandatory fee rates for resident undergraduate students the upcoming academic year; these meetings shall be open to the student body. A minimum of one public forum shall be held at the Klamath Falls campus and a minimum of one at the Portland-Metro campus to discuss and obtain input on the proposed tuition and mandatory fees; and broad notification of the forum shall be made to the university community.

To assist in making its recommendations, the Tuition Recommendation Committee shall receive a plan for how the Board of Trustees and Administration are managing costs on an ongoing basis and a plan for how resident tuition and mandatory enrollment fees could be decreased if the university receives more moneys from the state than anticipated.

When advising the president, the Tuition Recommendation Committee shall include input received at the public forum and considerations regarding the mechanisms by which moneys are appropriated by the Legislative Assembly to the Higher Education Coordinating Commission for allocation to universities, historical tuition and fee trends, comparative data for peer institutions, the University's budget and projected cost increases, and anticipated state appropriation levels. In addition to the recommendations, the report shall convey deliberations and observations of the Tuition Recommendation Committee, and must include any minority report requested by a Tuition Recommendation Committee member and any documents produced or received by the Tuition Recommendation Committee. The President shall bring the recommendations report and all associated documents to the Board for approval.

When setting tuition and fees, the Board may consider a number of factors, including the intent to (a) create affordable access to degree programs, (b) create a diverse student body, (c) maintain strong degree programs at every level, (d) develop and maintain the human and physical infrastructure necessary to support the university's educational outcome goals, and (e) maintain the fiscal integrity of the institution over the long-term

The Higher Education Coordinating Commission's (HECC) in an effort to increase transparency and predictability for the universities during the tuition setting process approved criteria at its December 13, 2018 meeting to be utilized in determining whether or not a proposed tuition increase of greater than five percent is "appropriate," as is required by Oregon Law.<sup>1</sup> Barring extreme or unforeseen circumstances, these criteria will be the only criteria utilized by the Commission in evaluating tuition increases. The university's compliance with the criteria will be judged using a "reasonableness" standard and determined using the totality of the institution's submission. These criteria were folded into the TRC deliberation process so that if the TRC were to advance a proposed tuition increase of greater than 5% the university would be able to meet the objectives delineated by the HECC. These criteria include three focus areas:

*Focus Area One: Fostering an Inclusive and Transparent Tuition-Setting Process.* Specifically, the institution must demonstrate that students had multiple opportunities to engage in the tuition-setting process, and that information about the tuition-setting process was easily accessible and in compliance with HB 4141.

*Focus Area Two: Safeguarding Access and Support for Degree Completion by Historically Underrepresented Students.* Specifically, the institution must demonstrate the impacts of tuition increases above and below five percent on remission programs and support services for underrepresented students; and that the university has a plan for reducing tuition if there is additional state funding available.

*Focus Area Three: Financial Conditions Demonstrating the Need for Resident, Undergraduate Tuition to be Increased More than 5%.* Specifically, the university is required to explain the cost drivers and revenue

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<sup>1</sup> Higher Education Coordinating Commission. University Tuition Increase Criteria. December 13, 2018. <  
<https://www.oregon.gov/highered/about/Documents/Commission/COMMISSION/2018/13%20December%202018/12.1a%20AI%20Tuition%20Increase%20Criteria%20updated%2012-11-18.pdf>>

dynamics that are causing tuition to increase above five percent and the impact on the university's mission; and that the university is implementing cost containment efforts.

### **Tuition Recommendation Committee**

The Tuition Recommendation Committee (TRC), comprised of students, faculty, and staff met eight times, beginning in November 2018 and held two public forums on both the Klamath Falls and Portland-Metro campuses for a total of four forums. These included early forums to educate the campus community held towards the end of February and forums in April designed to solicit feedback from students on a range of tuition scenarios developed by the Committee. Feedback from these forums were incorporated into the TRC recommendation and are available on the TRC's public website.

TRC was provided with financial projections, current tuition, and fee rates at other Oregon public universities and competitor institutions outside the state, and other information as background materials. This committee has submitted a recommendation to ASOIT, and ASOIT endorsed this recommendation to increase Resident Undergraduate Tuition by 9.0%, and increase the Health Program and Engineering Technology differential tuition from 25% to 30% premium over base tuition. The TRC made other recommendations regarding establishing a system to reduce tuition and fees if there is additional state support made available to the university through the Public University Support Fund (PUSF) beyond the Co-Chair's Recommended Budget. The TRC also made recommendations regarding increases in remission levels to increase supports for students most impacted by tuition increases. The Incidental Fee Commission (IFC) has made various recommendations related to changes in the incidental fee at the Klamath Falls campus and has recommended flat fees at the Portland-Metro campus. These recommendations are appended to this document.

The Tuition Recommendation Committee acted by consensus and all members of that body support the recommendation of the TRC and ASOIT.

### **Presidential Recommendation**

The President has recommended to the Board of Trustees changes in tuition and mandatory enrollment fees in line with that of the TRC and IFC, specifically an increase of base undergraduate tuition of 9.0% and an increase in the Health Program and Engineering Technology differential tuition from 25% to 30% premium over base tuition rates. This continues a multi-year strategy to increase differential tuition to better align with high cost, equipment intensive, and low cohort size programs. These programs tend to have very high median wages and thus continue Oregon Tech's tradition of high ROI programs. In addition, the President has recommended a 1.9% increase in incidental fees for students on the Klamath Falls campus, and that incidental fees remain flat at the Wilsonville campus for students enrolled during the regular academic year. Oregon Tech will continue to have a tuition price that is competitive with other institutions with similar programs both in the state and outside.

If the Board approves the changes in tuition and fees, as recommended by the President and incorporated in the staff recommendation, it will trigger subsequent review and approval by the HECC or the Legislative Assembly as outlined in ORS 352.102(4)(a). Oregon Tech staff have been

in contact with relevant HECC staff about this possibility and have prepared to present to the HECC at its June 13, 2019 meeting or at whatever date is made available by the Commission.

The recommendations outlined above from the President, ASOIT and the TRC as well as detailed tuition and mandatory enrollment fee tables are appended to the docket item.

### **Findings**

Oregon Tech, through the TRC, IFC, and actions of the President and delegates have followed, both in letter and spirit, applicable statutory and policy processes requirements in developing recommendations for tuition and mandatory fee rates for 2019-20. Specifically:

- The President has submitted a letter to the Oregon Tech Board of Trustees and through this docket item recommending changes to tuition and mandatory enrollment fees. This submission includes letters from the recognized student governments on both the Klamath Falls and Portland-Metro campuses. The recommendations are in alignment with each other.
- All process requirements of ORS 352.102 have been met.
- The evaluative focus areas for tuition increases outlined by the HECC have been incorporated into the deliberative process of the TRC and will be outlined during the presentation by TRC members to the Finance and Facilities Committee as well as the Board of Trustees.
- The TRC met a total of eight times beginning in November 2018 and concluding in May of this year, including with multiple public forums at each campus location, which were broadly advertised by the Associated Students of Oregon Institute of Technology (ASOIT).
- The TRC hosted a publicly available website and posted all relevant material to that website.
- Data required to be utilized during the TRC process was appropriately provided, evaluated and incorporated into the recommendation.

### **Committee Principles**

The TRC established a set of guiding principles to inform the deliberation and recommendation process. The Committee also read and reviewed the statutory and policy requirements of the group at its first and subsequent meetings. These guiding principles were reviewed or referenced at the beginning of every meeting.

#### **Guiding Principles:**

- Consider long-term factors when recommending the single year decisions (important to have a forward looking vision)
- Recognize the importance of affordability for students
- Tuition levels should be developed using data and information, including internal budget, comparator institutions, and external cost indices
- Ensure we maintain the current service level, quality and support that Oregon Tech provides to students

#### **Process Requirements:**

- Communicate openly and transparently with all stakeholders
- The committee will utilize data and information throughout the process
- Communicate respectfully and ask questions

Through its actions and recommendation, the TRC believes it has lived up to the guiding principles and process requirements it laid out at the beginning of its process.

### **Staff Recommendations**

Staff Recommends the Finance and Facilities Committee recommend to the full Board:

1. That tuition rates be established as follows:
  - a. undergraduate resident and non-resident tuition rates be increase by 9.0% from the 2018-19 academic year rates for the 2019-20 academic year;
  - b. undergraduate and graduate Engineering Technology and Health Program differential tuition be increase from 25% premium to 30% premium above base tuition for the 2019-20 academic year;
  - c. graduate resident and non-resident tuition rates be increase by 5.0% from the 2018-19 academic year rates for the 2019-20 academic year;
  - d. resident and non-resident Medical Lab Sciences, Paramedic Program and Chemeketa Dental Hygiene program tuition be increase by 5.0% from the 2018-19 academic year rates for the 2019-20 academic year;
  - e. graduate distance education tuition be increased by 7% from the 2018-19 academic year rates for the 2019-20 academic year;
  - f. summer tuition rates be adjusted in accordance with the regular academic year rates; and from the 2018-19 academic year rates for the 2019-20 academic year;
  - g. Staff rates will be increased at the same proportion as undergraduate resident and non-resident tuition rates; and
  - h. where applicable, proration, discounts, and options be maintained from the 2018-19 academic year for the 2019-20 academic year.
  - i. Tuition levels outlined in this motion are detailed in appended tuition tables which are controlling.
2. That mandatory fee rates be established as follows:
  - a. the Klamath Falls Incidental Fee increase from \$360 to \$367 per term as recommended by ASOIT, and for students enrolled in one to five credits a prorated amount be charged as follows: for the first credit enrolled, a student will be charged \$192, and an additional \$35 for every additional credit enrolled until a student reaches six credits;
  - b. the Klamath Falls Summer Incidental Fees remain at \$70 as recommended by ASOIT;
  - c. the Klamath Falls Health Service Fee be increased to \$167 per term;
  - d. the Wilsonville Incidental Fee remain at \$50 per term as recommended by ASOIT;
  - e. the Wilsonville Summer Incidental Fees remain at \$50 per term as recommended by ASOIT;
  - f. the Wilsonville Health Service Fee increase from \$38 to \$40 per term as recommended by ASOIT; and
  - g. the Building Fees remain at \$45 per term during the academic year, \$45 per term during the summer term, and remain constant regardless of the number of credits enrolled.
  - h. Incidental levels outlined in this motion are detailed in appended tuition tables which are controlling.
3. That if additional state funding becomes available through the Public University Support Fund (PUSF), and assuming that the Engineering Technology Sustaining Fund, Oregon Renewable Energy Center and Sports Lottery program are funded at levels equal to or greater than the prior Legislatively Approved Budget (LAB), the university shall decrease base undergraduate resident and non-resident tuition rates by 1% for every incremental \$20 million dollars above the Co-

Chairs Budget Framework of LAB +\$40.5 million dollars up until such time as the tuition increase reaches 2%.

4. That the President or designee is authorized to make minor and technical adjustments to these proposed rates as needed to correct errors, inconsistencies, or omissions, and execute the Board's directives including forwarding the tuition and fees to HECC.

**Attachments and Additional Information**

- [Tuition Recommendation Memo – President Naganathan](#)
- [Tuition Recommendation Memo – ASOIT](#)
- [Academic Year 2019-2020 Tuition Setting Process Report– Tuition Recommendation Committee](#)
- [2019-20 Incidental Fee Commission Recommendations](#)
- [Differential Majors](#)
- [Detailed Tuition Tables](#)



**PRESIDENT'S TUITION RECOMMENDATION**



**OFFICE OF THE PRESIDENT**

**Nagi G. Naganathan, Ph.D.**

To: Oregon Tech Board of Trustees  
From: President Naganathan  
Re: Academic Year 2019-20 Tuition Recommendation  
Date: May 22, 2019

As required by statute, through this memoranda, I submit to the Oregon Tech Board of Trustees my recommendation for tuition and fees for the 2019-2020 academic year. This recommendation was developed through an open and consensus based process led by the Tuition Recommendation Committee (TRC), a dedicated group composed of students, faculty and administrators from both major campuses. The TRC met eight times beginning in late November of last calendar year and concluding their process after multiple campus forums in February and April. I sincerely complement their dedication to proactively reaching out to and involving students in what is a difficult process.

The TRC has recommended an increase of 9.0% to undergraduate resident tuition, and an increase in differential rates from 25% to 30% from the 2018-19 academic year levels. This increase equates to a \$16.55 per credit hour change for most students and a \$30.71 per credit hour for those in majors which have differential tuition. This recommendation was supported by a consensus opinion of all student, faculty and staff representatives on the TRC and by the ASOIT Presidents on each campus, please refer to Attachment II. The TRC and ASOIT recommendation also included guidance related to increasing remission levels to support students most impacted by tuition increases. Specifically increasing the remission budget by one percent of total net tuition revenue or roughly \$350,000. ASOIT, acting through the Incidental Fee Commission, has also recommended a moderate increase in the Klamath Falls Campus Incidental Fee which funds Student Services, Athletics and the College Union, please refer to Attachment IV.

After thorough consideration and counsel from members of the executive staff and university community I endorse the TRC and ASOIT tuition and fee recommendations. Despite the unenviable task of establishing tuition in what continues to be a hard budget climate, I applaud the group for focusing on supporting our most vulnerable students and sustaining the long-term health and robustness of Oregon Tech's hand on education. Further, through the budget recommendation provided separately to the Board's Finance and Facilities Committee I am recommending an increase in remissions in excess of the TRC recommendation. The exact distribution of these funds will be determined by the Financial Aid Department in conjunction with the Associate Vice President of Strategic Enrollment Management. Please refer to Attachment V for detailed tuition tables.

The TRC followed an extended and inclusive process which involved stakeholders within the university community; students, faculty and staff. The group held multiple meetings often early in the morning or late into the evening to accommodate all members class and work schedules, with participants from both university campuses, used a consensus driven decision making model, established guiding principles in accordance with and expanding upon those outlined in Board policy. This process continues to serve as a model for increasing the level of trust, transparency and rigor in decision making at Oregon Tech. I encourage you to review the Tuition Recommendation Committee Academic Year 2019-2020 Tuition Setting Process Report as it outlines their process and deliberations. It can be found in Attachment III.

The guiding principles and process requirements established by the TRC were as follows:

#### Guiding Principles:

- Consider long-term factors when recommending the single year decisions (important to have a forward looking vision)
- Recognize the importance of affordability for students
- Tuition levels should be developed using data and information, including internal budget, comparator institutions, and external cost indices
- Ensure we maintain the current service level, quality and support that Oregon Tech provides to students

#### Process Framework:

- Communicate openly and transparently with all stakeholders
- The committee will utilize data and information throughout the process
- Communicate respectfully and ask questions

The TRC and university administration spent considerable time analyzing tuition increase options both above and below the recommended amount. When reflecting on the principles articulated by the students, faculty and staff of the Committee, comparator university tuition, internal budget projections, salary data for graduates and many other data points it became clear that the best interest of students was and is served by maintaining quality programs and by continuing to invest in our unique hands on professional programs.

Recognizing the potential negative effects of both very low and very high tuition increases the TRC elected to move forward with what was deemed a middle course. Tuition increases at or below 5.0% would require such significant budget reductions either this academic year, or in future years that they were determined by the TRC to be impractical and imprudent, particularly given the likely future reductions in state funding during a recession and the known increasing costs associated with state mandates such as PEBB and PERS. Not increasing tuition at rates in excess of 5.0% would imperil the capacity of the institution to serve our most vulnerable students, sustain needed student services and reduce the quality of Oregon Tech's programs to the extent that it would reduce the institution's ability to meet its HECC approved mission. Thus, the TRC and the leadership team focused on strategies that pair as moderate a tuition increase as possible with supports the students least able to bear the impact of increasing tuition. These populations include low-income, under-represented minority, veteran, rural and first generation students, identified as vulnerable by the State, as well as those students nearing completion but running low on financial aid which Oregon Tech continues to target for support. In order to mute the impact of tuition increases on these

student populations, this tuition recommendation allows for an a more predictable and moderated tuition plan in future years and sustained investments in institution funded remissions.

Even with tuition increases of this magnitude the university will be making significant and meaningful reductions in budgets and positions to offset cost increases, use of reserves in order to fund growth initiatives, and the assigning of aggressive budget targets across all divisions and functional units of the university. These are detailed in my budget recommendation to the Board for the fiscal year 2019-2020.

It is my commitment to the students that a tuition increase at these rates can only be made as part of an equitable sharing of the burden by all members of the university community.

### Tuition and Fees Comparison Table

Tuition & Fee Tables				
Oregon Tech Tuition Recommendation				
		2018-19 Per Credit	2019-20 Per Credit	% Change
Undergraduate	Resident	\$183.93	\$200.48	9.0%
	WUE	\$275.90	\$300.73	9.0%
	Non-Resident	\$585.45	\$638.14	9.0%
	Differential	25%	30%	
Special Programs	Medical Lab Sciences (Res)	\$256.82	\$269.66	5.0%
	Medical Lab Sciences (NR)	\$464.36	\$487.58	5.0%
	Paramedic (Res)	\$203.09	\$213.24	5.0%
	Paramedic (NR)	\$291.22	\$305.78	5.0%
	Chemeketa Dental Hygiene (Res)	\$203.09	\$213.24	5.0%
	Chemeketa Dental Hygiene (NR)	\$659.52	\$692.50	5.0%
Graduate	Resident	\$427.08	\$448.43	3.0%
	Non-Resident	\$716.93	\$752.78	3.0%
	Differential	25%	30%	

Oregon Tech Fee Recommendation				
		2018-19	2019-20	% Change
Klamath Falls	Building	\$45.00	\$45.00	0.0%
	Incidental	\$360.00	\$367.00	1.9%
	Health Services	\$165.00	\$167.00	1.2%
Wilsonville	Building	\$45.00	\$45.00	0.0%
	Incidental	\$50.00	\$50.00	0.0%
	Health Services	\$38.00	\$40.00	5.3%

## ASOIT TUITION RECOMMENDATION LETTER

### MEMORANDUM



**DATE:** May 1, 2019  
**To:** President Naganathan  
**CC:** Vice President Foley, Vice President Fox, and Board Secretary Fox  
**From:** Junmin Yee, President ASOIT-KF and Johnathan Nguyen, President ASOIT-WV  
**RE:** 2019-2020 Tuition Recommendation Committee

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Oregon Tech's Tuition Recommendation Committee (TRC) met eight times, beginning late Fall Term 2018 completing its work on April 23<sup>rd</sup> after holding four joint TRC/ASOIT student forums on both the Klamath Falls and Portland Metro campuses. The TRC was comprised of a broad and diverse group of students from both campuses, including multiple residencies, majors and interests as well as faculty from both the College of Engineering, Technology and Management and Health, Arts and Sciences and administrators. ASOIT leadership from both campuses attended every meeting of the TRC. As a group the Committee communicated openly and transparently with each other and, as importantly, with stakeholders across both campuses through student forums and faculty meetings.

ASOIT with support of Student Affairs and Finance and Administration advertised TRC meetings, student forums and provided links to material and feedback opportunities on the TRC website at [www.oit.edu/trc](http://www.oit.edu/trc) in order to facilitate student and community feedback.

During TRC meetings and at the campus forums the Committee discussed internal budget projections for upcoming academic years, tuition rates at competitor institutions, state funding levels, state mandated cost increases, university financial aid strategy and tools to reduce the impact of tuition increases on at-risk student populations, among other factors.

This information was used to develop the tuition recommendation for the 2019-2020 academic year.

Though a consensus based process at its April 23<sup>rd</sup> meeting the TRC established a tuition recommendation by reflecting on the principles established during its first meeting. These principles are as follows:

- Consider long-term factors when recommending the single year decisions (important to have a forward looking vision)
- Recognize the importance of affordability for students
- Tuition levels should be developed using data and information, including internal budget, comparator institutions, and external cost indices.
- Ensure we maintain the current service level, quality and support that Oregon Tech provides to students.

During the final meeting of the TRC it recommended a “middle path” tuition increases for undergraduate base tuition and differential tuition in order to maintain the quality and strong return on investment an Oregon Tech education provides, ensure continued investments in equipment intensive programs, and create the space for increased levels of financial aid to support student affordability and completion. The Committee’s recommended changes in tuition for the 2019-20 academic year are as follows:

- Base undergraduate tuition: increase by 9% over current rates.
- Health Program and Engineering & Technology Differentials: increase by 5% from 25% to 30% premium on base undergraduate tuition.

The TRC also recommended increases in remissions of 1% of tuition during the 2019-20 academic year and after receiving feedback from students encourage the President to prioritize investments in IT including, classroom and lab computer replacement, WiFi systems, etc. to improve student life and enhance the academic experience.

If additional funds for the Public University Support Fund, beyond those outlined by the Co-Chairs of the Joint Committee on Ways and Means, become available the TRC discussed reducing tuition in the amount of 1% and increases in remissions for every \$20 million dollars in additional state support. The TRC believes this is an important component of setting tuition while under significant uncertainty in the total amount of state funding and have incorporated it into its recommendation.

After deliberation and consultation with students, ASOIT concurs with the Tuition Recommendation Committee’s recommendation and submits it for your consideration.

May 30, 2019

Respectfully,



Junmin Yee  
President  
ASOIT – Klamath Falls



Johnathan Nguyen  
President  
ASOIT – Wilsonville

**ACADEMIC YEAR 2019-2020  
TUITION SETTING PROCESS REPORT**

To: President Naganathan  
From: Tuition Recommendation Committee  
Date: May 15, 2019  
Subject: Tuition Recommendation Committee Report

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The Tuition Recommendation Committee (TRC) submits this final report outlining its recommendations, as well as a description of its deliberations and observations regarding the 2019-2020 Academic Year tuition setting process.

This report is a consensus-based document, as was the process and decision making of the diverse group. The report provides the following information:

- Academic Year 2019-2020 Tuition Recommendation Committee Tuition Recommendation
- Tuition Recommendation Committee Charter, Principles and Membership
- HB 4141 Process Requirements & HECC Tuition Increase Criteria
- Campus Forum Feedback and Tuition Recommendation Committee Deliberations
- Meetings and Topics of Discussion
- Conclusion

All documents distributed to the TRC are appended to this document.

Respectfully submitted,

Richard Bailey  
*Faculty, Dept. of Management*

Osvaldo Capistran-Perez  
*ASOIT-PM Vice President*

Erin Foley, *ex officio*  
*VP Student Affairs*

Brian Fox, *chair*  
*VP Finance & Administration*

Erik Johnson  
*Director of Admissions*

Taylor Kimura  
*Student Representative*

Paul Titus, *proxy*  
*Office of the Provost*

Faith Lee  
*Student Representative*

Anne Malinowski  
*Assistant Registrar*

Kathryn Mura  
*Student Representative*

Johnathan Nguyen  
*ASOIT-PM President*

Rosanna Overholser  
*Faculty, Dept. of Mathematics*

Junmin Yee  
*ASOIT-KF President*



**Tuition Recommendation Committee**  
**Academic Year 2019-2020**

**Tuition Setting Process Report**

May 15, 2019



## **Academic Year 2019-2020 Tuition Recommendation**

The Tuition Recommendation Committee (TRC), through an inclusive and consensus based process, has established a “middle path” tuition increase for the 2019-2020 Academic Year. This recommendation assumes state funding levels contemplated in the Co-Chairs of the Joint Committee on Ways and Means budget framework from March 2019 (Co-Chairs’ Budget). The TRC discussed in significant depth Oregon Tech’s remissions and scholarship system; its budget and alternative tuition scenarios if the Oregon Legislature approves, and the Governor signs, legislation that funds the Public University Support Fund (PUSF) in excess of the Co-Chairs Budget. These deliberations were guided by a set of principles established by the Committee with a particular focus on balancing the quality and return on investment of an Oregon Tech degree; and protecting all students, and in particular those most sensitive to tuition increases, from the unfortunate budget realities faced by the Committee and the university.

Specifically, in order to maintain the quality and strong return on investment an Oregon Tech education provides, ensure continued investments in equipment intensive programs, and create the space for increased levels of financial aid to support student affordability and completion, the TRC recommends changes in tuition for the 2019-20 academic year are as follows:

- Base undergraduate tuition: increase by 9% over current rates.
- Health Programs and Engineering & Technology Programs Differentials: increase by 5% from 25% to 30% premium on base undergraduate tuition.

The TRC also recommends increases in remissions of 1% of tuition during the 2019-2020 academic year. Though it is outside of the Committee’s direct purview, after receiving feedback from students, the Committee encourages the President to prioritize investments in IT including, classroom and lab computer and technology replacement, WiFi systems, and other technology systems directly tied to improving the academic experience and enhancing student life.

If additional funds for the PUSF, beyond those outlined in the Co-Chairs’ Budget, become available, the TRC discussed reducing tuition in the amount of 1%; and increases in remissions for every \$20 million dollars in additional state support. The TRC believes this is an important component of setting tuition while uncertainty exists regarding the total amount of state funding, and have thus incorporated it in the recommendation.

This recommendation is supported in a joint letter by the recognized student governments, the Associated Student of Oregon Institute of Technology – Klamath Falls (ASOIT-KF) and the Associated Students of Oregon Institute of Technology – Portland Metro (ASOIT-PM) dated May 1, 2019.<sup>2</sup>

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<sup>2</sup> ASOIT 2019-2020 Tuition Recommendation Memo. May 1, 2019. < [https://oregontechsfstatic.azureedge.net/sitefinity-production/docs/default-source/finance-and-administration-documents/trc/\(2019-5-1\)-asoit-tuition-recommendation-memo.pdf?sfvrsn=753307cd\\_2](https://oregontechsfstatic.azureedge.net/sitefinity-production/docs/default-source/finance-and-administration-documents/trc/(2019-5-1)-asoit-tuition-recommendation-memo.pdf?sfvrsn=753307cd_2)>

## **Tuition Recommendation, Committee Charter, Principles and Membership**

The Tuition Recommendation Committee is established by Board of Trustees policy and is operationalized through a charter and committee membership approved by the president annually.

At its January 24, 2019 meeting, the Oregon Tech Board of Trustees amended its tuition policy to be in compliance with recent changes in Oregon Revised Statutes related to tuition setting. The Board Policy on Resident Undergraduate Tuition and Mandatory Enrollment Fee Process<sup>3</sup> establishes a minimum number of meetings, public forums and notification requirements to the student body. The policy also outlines the President, or President's or designee's responsibility to support and provide information to the TRC related to the budget of the university and impact of state funding. The Board Policy further assigns the TRC the role of recommending to the President changes in tuition and conveying the substance of the group's deliberations and feedback provided at campus open forums.

Oregon Tech's President annually approves charters and membership of university standing committees, commissions and councils<sup>4</sup>. Administrative members of the TRC are appointed by the president and student members are appointed by the Vice President of Student Affairs in consultation with the ASOIT. There are certain membership requirements established by HB 4141 (2018). These are incorporated into university policy by the Board of Trustees and were followed when establishing the composition of the committee. The TRC Charter, as approved by the President, is as follows:

The Tuition Recommendation Committee is responsible for recommending the tuition and mandatory fee rates to the President who must in turn report and recommend mandatory tuition and fee to the Board of Trustees in accordance with ORS 352.102. The Board of Trustees shall request that the President transmit to the Board the joint tuition recommendation of the President and the recognized student government.

This committee is comprised of six students representing both the Klamath Falls and Portland-Metro campuses and is appointed by the ASOIT president(s), two of which represent ASOIT and two of which represent historically underserved students of the university, as defined by the university; the Fiscal Operations Advisory Council (FOAC) chair and at least two administrators. Any changes to the Committee structure required by ORS 352.102, subsequent controlling statutes or Board Policy may be made without notification. The President shall designate one member to chair the committee.

Before making any recommendation to increase tuition and mandatory fees, but especially when the proposed increase is more than five percent annually, the

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<sup>3</sup> Oregon Institute of Technology Board of Trustees' Policy on Resident Undergraduate Tuition and Mandatory Enrollment Fee Process. January 24, 2019. < [https://oregontechsfstatic.azureedge.net/sitefinity-production/docs/default-source/board-of-trustees-documents/2019-meetings/january/policy\\_tuition-and-fee-process\\_amended-2019-01-24.pdf?sfvrsn=cc26d5c\\_2](https://oregontechsfstatic.azureedge.net/sitefinity-production/docs/default-source/board-of-trustees-documents/2019-meetings/january/policy_tuition-and-fee-process_amended-2019-01-24.pdf?sfvrsn=cc26d5c_2)>

<sup>4</sup> Oregon Tech: Standing Committees, Commissions, and Councils. August 2018. <[https://oregontechsfcdn.azureedge.net/oregontech/docs/default-source/faculty-staff-documents/councils-commissions-committees/standing-committees/2018-19-standing-committees.pdf?sfvrsn=35d16567\\_10](https://oregontechsfcdn.azureedge.net/oregontech/docs/default-source/faculty-staff-documents/councils-commissions-committees/standing-committees/2018-19-standing-committees.pdf?sfvrsn=35d16567_10)>

Committee must document its consideration of the impact on students, and the necessity of the increase in achieving the mission of the University. The Committee shall provide meaningful opportunities for members of the student government and students at large to participate in the process and deliberations.

The committee will meet at least twice during January – February. Its meetings shall be open to the public and broad notification of the meetings shall be made to the university community. The committee will consider the guidelines provided by the Board, information provided by the Administration, and such other matters as shall seem appropriate.

The membership and affiliation of the Tuition Recommendation Committee is listed below:

<u>Name</u>	<u>Affiliation</u>	<u>Campus Location</u>
Brian Fox, <i>Chair</i>	Vice President for Finance and Administration	Klamath Falls
Richard Bailey	Faculty, Department of Business Management, ETM	Klamath Falls
Osvaldo Capistran-Perez	ASOIT Vice President	Portland-Metro
Erin Foley ( <i>ex-officio</i> )	Vice President for Student Affairs and Dean of Students	Klamath Falls
Ernesto Hernandez	Student Representative	Klamath Falls
Erik Johnson	Director of Admissions	Klamath Falls
Taylor Kimura	Student Representative	Klamath Falls
Gary Kuleck*	Provost and Vice President for Academic Affairs	Klamath Falls
Faith Lee	Student Representative	Klamath Falls
Anne Malinowski	Assistant Registrar	Portland-Metro
Kathryn (Katie) Mura	Student Representative	Klamath Falls
Johnathan Nguyen	ASOIT President	Portland-Metro
Rosanna Overholser	Faculty, Department of Mathematics, HAS	Klamath Falls
Junmin Yee	ASOIT President	Klamath Falls

\*Provost Kuleck appointed Paul Titus to act by proxy for the Office of the Provost for TRC process.

The Committee was supported by, and is grateful to a key set of staff members, from varying units across the university, tasked with providing information to the Committee, these include the following:

<u>Name</u>	<u>Affiliation</u>	<u>Campus Location</u>
Cindy Childers	Business Affairs Office	Klamath Falls
Karissa Guthrie	Business Affairs Office	Klamath Falls
Jaron Hartman	Institutional Research	Klamath Falls
Brittany Miles	Government Affairs	Portland-Metro
Stephanie Pope	Budget and Planning Office & Business Affairs Office	Klamath Falls
Farooq Sultan	Institutional Research	Klamath Falls

At the TRC's first meeting on November 27, 2018, the Committee discussed and approved, by consensus, a set of governing principles and process guidelines for the tuition development process.

These guidelines established both *how* the group would conduct its meetings and engagements with students throughout the development and decision making process and, importantly, *what* priorities it had to balance in recommending tuition levels to the President for the 2019-20 Academic year. These principles were referenced or reviewed at every TRC meeting and in all campus and community forums, as these were integral to the TRC's deliberations. The TRC Guiding Principles and Process Guidelines<sup>5</sup> are as follows:

#### Guiding Principles:

- Consider long-term factors when recommending the single year decisions (important to have a forward looking vision)
- Recognize the importance of affordability for students
- Tuition levels should be developed using data and information, including internal budget, comparator institutions, and external cost indices
- Ensure we maintain the current service level, quality and support that Oregon Tech provides to students

#### Process Framework:

- Communicate openly and transparently with all stakeholders
- The committee will utilize data and information throughout the process
- Communicate respectfully and ask questions

### **HB 4141 Process Requirements & HECC Tuition Increase Criteria**

During the 2018 Legislative Session, House Bill (HB) 4141 was passed and signed into law.<sup>6</sup> HB 4141 outlines certain requirements for the composition of each university's tuition advisory body and the process by which it operates.

Oregon Tech has a long and successful history of an inclusive tuition setting process, including students, faculty and administrative staff. The Oregon Tech Board of Trustees' policy on tuition setting and the presidential charge of the TRC included in the Oregon Tech Committees, Commissions, and Councils (2018-19) are in alignment with the requirements of HB 4141. Below is an analysis of the requirements outlined by HB 4141, and the steps taken by the TRC to meet these requirements.

- *Section 2(1)* requires that each public university establish "...an advisory body to advise the president of the university on the president's recommendation to the governing board regarding tuition and mandatory enrollment fees for the upcoming academic year."
  - o The TRC is the advisory body, as contemplated by HB 4141 for Oregon Tech.
- *Section 2(2)* outlines certain requirements regarding committee membership and "...establish a written document describing the role of the advisory body[.]"

<sup>5</sup> 2019 Tuition Recommendation Committee Charter and Principles. January 25, 2019. <  
[https://oregontechsfstatic.azureedge.net/sitefinity-production/docs/default-source/finance-and-administration-documents/trc/\(2019-1-25\)-1-trc-committee-charge-and-process-requirements.pdf?sfvrsn=fa03212b\\_2](https://oregontechsfstatic.azureedge.net/sitefinity-production/docs/default-source/finance-and-administration-documents/trc/(2019-1-25)-1-trc-committee-charge-and-process-requirements.pdf?sfvrsn=fa03212b_2)>

<sup>6</sup> House Bill 4141 (2018). April 3, 2018.  
 <<https://olis.leg.state.or.us/liz/2018R1/Downloads/MeasureDocument/HB4141/Enrolled>>

- This was accomplished through the distribution of membership as agreed to between the Vice President of Student Affairs and ASOIT for student members, and as assigned by the president for faculty and administrative members of the Committee. The president's charge for the committee and the Oregon Tech Board of Trustees' Policy on Resident Undergraduate Tuition and Mandatory Enrollment Fee Process outline the role and relationships of the advisory body, the university, the President and the Board of Trustees in the tuition setting process.
- *Section 2(3)* includes training requirements regarding the university's budget, state appropriations and mechanisms of their distribution, historical relationships between state appropriation and tuition for Committee members.
  - Training requirements under this section were accomplished through a series of meetings at the outset of the TRC process spanning from November 2018 through February 2019 when tuition setting deliberations began. High level information regarding these topics were provided to the student body during the first and second tuition forums held on each primary campus location to ensure participants had sufficient background information to meaningfully participate in the deliberation and recommendation process.
- *Section 2(4)* requires the university provide "[a] plan for how the university is managing its costs on an ongoing basis and how resident tuition and mandatory enrollment fees may be decreased if the public university receives more moneys from the state than anticipated."
  - Information on how the university is managing its cost structure was incorporated into the TRC's deliberations through modeling the medium-term impact of different tuition and state appropriation scenarios in relation to known and anticipated cost drivers and then identifying required use of reserves or budget cuts necessary to maintain the financial integrity of the university. This task is challenged by the need for consistent replacement and updating of high-cost equipment in the university's technology focused programs, and the fact that the university continues to grow in enrollment and complexity. The TRC incorporated a recommendation related to reductions in tuition with incremental increases in state funding for the PUSF into its tuition recommendation.
- *Section 2(5)* requires the advisory body, if its recommendation is to increase tuition and mandatory enrollment fees greater than five percent, to document the impact on historically underserved students, the mission of the university.
  - The TRC accomplished these requirements through material provided by the university and TRC deliberations, establishing three tuition scenarios with varying levels of cuts, use of reserves, tuition and remission levels. The TRC allowed for broad student engagement and discussion of such scenarios, including how increasing tuition and the use of increased remissions would offset these impacts.
- *Section 2(6)* requires that the TRC "[p]rovide meaningful opportunities" for the student government and students more broadly to participate in the TRC process and deliberations and report such deliberations in writing to the President. The written report must provide any minority report requested by a member of the advisory body.
  - ASOIT Leadership from both the Portland-Metro and Klamath Falls campuses were members of the TRC. During the deliberation process, the TRC held meetings that

were open to the campus community and public generally, as well as multiple student forums on both campus locations, specifically designed to elicit student feedback and incorporate it into committee deliberations. This feedback is posted on the TRC's website. At Oregon Tech as a further step to involve ASOIT, the student government is requested to provide a final tuition recommendation to the President outside of the TRC's recommendation to ensure that students are highly involved in the process. This document constitutes the TRC's written report as required by HB 4141. No member of the advisory body has requested the inclusion of, or submitted, a minority report.

- *Section 2(7)* requires the university establish a website including all material provided by the university and utilized by the advisory body during its deliberations.
  - o The university hosted and advertised a website for the TRC, [www.oit.edu/trc](http://www.oit.edu/trc), and ensured that it was easy and simple for students to find the website. This website includes all material, meeting minutes and tuition setting calendars. This website also includes links so that students or members of the public could join meetings remotely if they were not able to make it to either the Klamath Falls or Portland-Metro campuses.

At the Higher Education Coordinating Commission's (HECC's) December 13, 2018 meeting, the Commission approved criteria to be utilized in determining whether or not a proposed tuition increase of greater than five percent is appropriate, as is required by Oregon Law.<sup>7</sup> Barring extreme or unforeseen circumstances, these criteria will be the only criteria utilized by the Commission in evaluating tuition increases. The university's compliance with the criteria will be judged using a "reasonableness" standard and determined using the totality of the institution's submission. The TRC was briefed on the draft HECC criteria at its first meeting in November 2018 and again with the final HECC approved criteria at its January 2019 meeting. These criteria are split into three areas of focus, and are outlined below. A brief description of the TRC's steps taken to ensure that Oregon Tech met the criteria is also provided.

*Focus Area One: Fostering an Inclusive and Transparent Tuition-Setting Process.* Specifically, the institution must demonstrate that students had multiple opportunities to engage in the tuition-setting process, and that information about the tuition-setting process was easily accessible and in compliance with HB 4141.

The TRC is comprised of primarily students and held multiple tuition forums on both the Portland-Metro and Klamath Falls campuses. These forums were sponsored and organized by the respective campus student government and advertised heavily in written and electronic communications and through multiple channels, including email, website, electronic and hardcopy newsletters, student mobile apps, and information screens across campuses. All TRC material and meetings were publically posted on the TRC's website and material was available electronically. Means for feedback from students, either electronically

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<sup>7</sup> Higher Education Coordinating Commission. University Tuition Increase Criteria. December 13, 2018. <  
<https://www.oregon.gov/highered/about/Documents/Commission/COMMISSION/2018/13%20December%202018/12.1a%20AI%20Tuition%20Increase%20Criteria%20updated%2012-11-18.pdf>>

or in person, were provided and supplied to the Committee. All process requirements of HB 4141 were met, as outlined previously in this document.

*Focus Area Two: Safeguarding Access and Support for Degree Completion by Historically Underrepresented Students.* Specifically, the institution must demonstrate the impacts of tuition increases above and below five percent on remission programs and support services for underrepresented students; and that the university has a plan for reducing tuition if there is additional state funding available.

The TRC considered multiple tuition scenarios, including some at the five percent threshold and others significantly above. Because of the TRC's principles which required it to balance the impact of tuition increases on students with maintaining the quality, return on investment and current levels of service at Oregon Tech it was determined that increases of tuition at or below five percent would endanger the very reason students enroll at Oregon Tech – its high quality, high value programs. The committee heard from the university's financial aid administrator about remission programs, including funding levels and design in order to evaluate the impact of tuition increases and remission programs on underrepresented students. The TRC has discussed and made recommendations related to both tuition and remission levels as well as how to reduce tuition levels and/or increase remission levels if there is additional state support. These are outlined in the TRC recommendation and incorporated in the ASOIT tuition recommendation to the President.

*Focus Area Three: Financial Conditions Demonstrating the Need for Resident, Undergraduate Tuition to be Increased More than 5%.* Specifically, the university is required to explain the cost drivers and revenue dynamics that are causing tuition to increase above five percent and the impact on the university's mission; and that the university is implementing cost containment efforts.

The TRC began its tuition development process by examining the composition of the university's budget and the forces acting on all major budget categories, many of which are direct responses to meeting both the university's mission of statewide polytechnic education and the HECC's focus areas, including broad access to and completion from high quality degree programs in a broad and equitable manner. Recommending increases in tuition rates below five percent during a budget cycle in which state imposed cost increases related to retirement and health care expenses are increasing dramatically and are not being funded, was quickly determined by the TRC to be impractical and damaging to students and the university. All tuition recommendation scenarios brought forward by the committee to students required significant use of reserves and cuts in operating expenses. The TRC's direct purview does not include the development of a university budget. However, it recognizes that tuition increases at the recommended level will necessitate ongoing reductions in operating expenses. It has made a recommendation to the President to increase investments in certain areas, including remissions and spending on IT equipment directly related to the student experience, including classroom technology and equipment.

It is the TRC's belief that the university has, through its good faith efforts, met the HECC Tuition Increase Criteria given the depth and breadth of information provided to the TRC by the university and through the TRC's deliberations and outreach to students.

### **Campus Forum Feedback and Tuition Recommendation Committee Deliberations**

As noted earlier in the report, during the TRC's first two meetings it established a set of guiding principles and process framework. The guiding principles were established to support the deliberation process and ensure the Committee was able to bring into the conversation the type of data and information necessary to provide an informed recommendation, and establish what objectives were important to balance. These principles helped the Committee navigate the *what* of its charge. Conversely, the process framework provided guidance regarding the *how* of its deliberations. Both were reviewed or mentioned during each TRC meeting and described to the campus during the open forums.

In order to make an informed recommendation to the President the TRC utilized its first several meetings to familiarize itself with the university's current and historical budget and the drivers, which are affecting major budget categories, including both revenues and expenses. This process included learning about the legislative and political processes and timelines, which lead to the allocation of funds to the PUSF as well as how the PUSF is distributed to each university in the state. The tuition setting process this year was slowed significantly by the level of uncertainty created by multiple PUSF recommendations from the Governor, discussions regarding revenue enhancement packages from the Oregon Legislature, and finally from increased review of certain funding items within the Co-Chair's Budget Framework like the Engineering Technology Sustaining Fund, Sports Lottery and the Oregon Renewable Energy Center. When combined, this caused the TRC to delay its work significantly, and precipitated a request by the TRC to delay the Board of Trustee's consideration of tuition from its March 21, 2019 meeting to its May 30, 2019 meeting.

The effort of the TRC to understand in detail the budget, state finance drivers, allocation methodology, and importantly tuition and remission history of the university allowed it to understand more deeply the budget hydraulics which are causing increases in overall costs at Oregon Tech; and in particular cost increases in areas outside of the university's control such as mandated retirement (PERS) and healthcare (PEBB) benefits for employees; and through investments in the university's core teaching mission which are driving changes in the operating budget. Because increases in PERS and PEBB are also negatively impacting other portions of the state budget, it is unlikely that the state will be able to invest sufficient resources to shield students from paying for these costs, which have little or no direct positive impact on student success. These budget dynamics were presented to students at the first two campus forums on both campuses.

Because the TRC laid out a series of principles, which included balancing three major items -- student affordability, the quality of programs within the university and the long-term impact of a single-year decisions (tuition for the 2019-20 Academic Year) -- the committee was able to approach a recommendation by creating a balanced approach. This included increases in tuition, recommending ongoing cuts to the universities operating budget and use of reserves to stabilize changes in the short-term.

During the final two campus forums on each primary campus location, the TRC presented a range of options with varying levels of impacts designed to close Oregon Tech's significant budget gap in the next fiscal year. These included tuition increases ranging from 7% to 15%. The forums were hosted by ASOIT leaders on both campuses and designed to elicit feedback from participants.



At the campus forums it became clear that students were concerned that tuition increases of such magnitude were being considered, or were necessary. However, there was broad understanding that maintaining the high level of quality and return on investment of an Oregon Tech degree was as important as price for most students. Students generally understood that merely maintaining the university's quality and strong reputation was insufficient, but continuing to grow and strengthen the university would serve them in the future as their degree became more valuable, and would also serve future students.

Part of maintaining and enhancing the quality of education at Oregon Tech includes investing in state-of-the-art equipment in all degree fields and programs. This is only possible if the university is fiscally sound.

There was significant frustration on the part of students that the state was not stepping up to its responsibility to fund universities at levels which offset the mandatory cost increases imposed by past legislative choices. Because of this, students at Oregon Tech have shown their interest and willingness to become involved in the political process to help persuade legislators of the importance of funding universities and in turn students. ASOIT and the university are providing opportunities such as participation in TRU Day at the Capitol, where students can directly advocate university needs to legislators, as well providing links for students to easily call or write letters to their representatives and senators.

Given that state funding at the Co-Chair's Budget Framework level is not sufficient to keep the university on strong fiscal footing without tuition increases in excess of five percent, students at the open forums were supportive of the TRC's "middle path" tuition increase. This included three additional conditions below.

That the university should:

- Make investments to support continued increases in remissions and scholarships that support students who are in need of additional support;
- continue to make investments in equipment and IT systems that have a direct and positive impact on students' experience and education; and
- establish a schedule of reductions in tuition levels if the state were to provide additional investments in the PUSF (see below for details).

This approach provides a balanced approach which will help to sustain the university over the long-term for the benefit of current and future students and was included in the TRC recommendation.

## **Conclusion**

After significant deliberation and discussion spanning nearly five months and all three academic terms, the TRC has completed its charge as outlined by the President, and to the extent possible met all process and review criteria established by the HECC through its Tuition Increase Criteria and the law, as embodied in HB 4141. Through this document, the TRC outlines its recommendation for tuition levels at Oregon Tech for the 2019-2020 Academic Year.

The TRC finds it important when discussing any tuition recommendation that maintaining if not increasing the quality and strong return on investment an Oregon Tech education provides must remain paramount. This is one of major the reasons why students enroll in Oregon Tech as their institution of choice.

Specifically, the TRC recommends changes in tuition for the 2019-20 academic year as follows:

- Base undergraduate tuition: increase by 9% over current rates.
- Health Program and Engineering & Technology Differentials: increase by 5% from 25% to 30% premium on base undergraduate tuition.

The TRC also recommends increases in remissions of 1% of tuition during the 2019-2020 academic year. Though it is outside of the Committees direct purview, after receiving feedback from students, the Committee encourages the President to prioritize investments in IT including, classroom and lab computer and technology replacement, WiFi systems, and other technology systems directly tied to improving the academic experience and enhancing student life. .

If additional funds for the Public University Support Fund (PUSF), beyond those outlined by the Co-Chairs' Budget, become available the TRC discussed reducing tuition in the amount of 1% and increases in remissions for every \$20 million dollars in additional state support. The TRC believes this is an important component of setting tuition while under significant uncertainty in the total amount of state funding and have incorporated it into its recommendation.

## **Appendix I: Tuition Recommendation Committee Material**

The Tuition Recommendation Committee Reviewed and extensive amount of material relevant to its decision making process. Because of the breadth of material and convenience of the reader this material hereby incorporated into the report by reference and is available at [www.oit.edu/trc](http://www.oit.edu/trc).

## ASOIT INCIDENTAL FEE RECOMMENDATION LETTER



**MEMORANDUM**

**Date:** March 20, 2019  
**To:** Dr. Nagi Naganathan, President, Oregon Institute of Technology  
**From:** Junmin Yee, President, ASOIT  
**CC:** Dr. Erin Foley, Shellie Wilson, John Van Dyke, Holly Anderson, Josie Hudspeth, Stephanie Pope, Brian Fox  
**RE:** 2019-2020 Incidental Fee Commission Recommendations

The IFC convened on February 27, 2019 and reviewed the budgets presented by the Director of Athletics (John Van Dyke), the Associate Directors of Campus Life (Holly Anderson and Josie Hudspeth), and Manager of the College Union (Shellie Wilson). Financial Information is provided in more detail below.

After thorough review, the Incidental Fee Commission (IFC) has decided to recommend an increase to the Incidental Fees for the 2019-2020 academic year. The recommendation is that the Klamath Falls Incidental Fee increases from \$360 to **\$367** per term for every student enrolled in six or more credits and that the fee structure change so that students with 1 to 5 credit hours have a step increase for each additional credit. Specifically, the fee for 1 would be \$192, with an additional \$35 more for each additional credit; therefore, 5 credits would be \$332.

**Financial Data**

IFC Funding Areas	2018-2019		2019-2020 Recommended		
	\$ Budgeted	% of Total	\$ Budgeted	\$ Inc./ (Dec.)	New Allocation %
Athletics	<b>\$851,565</b>	39.3%	<b>\$820,000*</b>	\$22,435	37.5%
Campus Life	<b>\$725,544</b>	33.5%	<b>\$764,733</b>	\$39,189	35.0%
College Union	<b>\$588,000</b>	27.2%	<b>\$600,000</b>	\$12,000	27.5%
<b>Totals</b>	<b>\$2,165,109</b>	<b>100%</b>	<b>\$2,184,733</b>	<b>\$73,624</b>	<b>100%</b>

\*Athletics moved \$54,000 to the Student Rec Center beginning FY20.

**Wilsonville Campus**

Wilsonville students also have an incidental fee and the recommendation by ASOITW is to not change the fees for 2019-20, keeping the incidental fee at \$50 per term. They are recommending a \$2 increase to the health fee to \$40 (up from \$38) per term.

**Summer 2020 Incidental Fees**

The summer 2020 Incidental Fee for Klamath Falls students will remain \$70, regardless of the number credit hours enrolled. For the Wilsonville Campus, Incidental Fees will remain at \$50, regardless of the number of hours enrolled (the health fee will increase to \$40 from \$38).

We appreciate your consideration, and I welcome any and all questions you may have. Thank you for your time.

**DIFFERENTIAL MAJOR LIST**

## Tuition Differentials 2019-20 Academic Year

<b>Majors with Differential Tuition</b>	
<b>Health Professions Differential (30%)</b>	<b>Engineering &amp; Technology Differential (30%)</b>
Allied Health – Master's	Health Care Management
Dental Hygiene	Civil Engineering
Diagnostic Medical Sonography	Civil Engineering – Master's
Echocardiography	Electrical Engineering
Nuclear Medicine Technology	Electronics Engineering Technology
Polysomnographic Technology	Embedded Systems Engineering Technology
Radiological Science	Engineering – Master's
Respiratory Care	Geomatics
Vascular Technology	Manufacturing Engineering Technology
	Manufacturing Engineering Technology – Master's Degree
	Mechanical Engineering
	Mechanical Engineering Technology
	Renewable Energy Engineering
	Renewable Energy Engineering – Master's
	Software Engineering Technology

<b>Majors with Other Differential Rates</b>	
Medical Lab Sciences	Dental Hygiene – Chemeketa
Paramedic	Nursing (tuition to OHSU/fees to Oregon Tech)

<b>Majors with no Differentials</b>	
Applied Mathematics	Management
Applied Psychology	Health Informatics
Communications	Information Technology
Environmental Sciences	Marriage and Family Therapy – Master's
Biology	Operations Management
Biology Health Sciences	Population Health Management
Applied Mathematics	



## DETAILED TUITION TABLES

**2019 - 2020 Undergraduate Tuition and Fees - Klamath Falls Campus**

Credit Hours	Tuition			Fees					Total Tuition & Fees Resident	Total Tuition & Fees WUE	Total Tuition & Fees Non-Resident
	\$200.48/cr Resident	\$300.72/cr WUE	\$638.14/cr Non-Res	Building	Incidental	Health Service Fee	Student Rec Center Fee	Total Fees			
1	200.48	200.48	200.48	23.00	192.00	0.00	69.00	284.00	484.48	484.48	484.48
2	400.96	400.96	400.96	25.00	227.00	0.00	69.00	321.00	721.96	721.96	721.96
3	601.44	601.44	601.44	27.00	262.00	0.00	69.00	358.00	959.44	959.44	959.44
4	801.92	801.92	801.92	29.00	297.00	0.00	69.00	395.00	1,196.92	1,196.92	1,196.92
5	1,002.40	1,002.40	1,002.40	31.00	332.00	0.00	69.00	432.00	1,434.40	1,434.40	1,434.40
6	1,202.88	1,202.88	1,202.88	33.00	367.00	167.00	69.00	636.00	1,838.88	1,838.88	1,838.88
7	1,403.36	2,105.04	4,466.98	35.00	367.00	167.00	69.00	638.00	2,041.36	2,743.04	5,104.98
8	1,603.84	2,405.76	5,105.12	37.00	367.00	167.00	69.00	640.00	2,243.84	3,045.76	5,745.12
9	1,804.32	2,706.48	5,743.26	39.00	367.00	167.00	69.00	642.00	2,446.32	3,348.48	6,385.26
10	2,004.80	3,007.20	6,381.40	41.00	367.00	167.00	69.00	644.00	2,648.80	3,651.20	7,025.40
11	2,205.28	3,307.92	7,019.54	43.00	367.00	167.00	69.00	646.00	2,851.28	3,953.92	7,665.54
12	2,405.76	3,608.64	7,657.68	45.00	367.00	167.00	69.00	648.00	3,053.76	4,256.64	8,305.68
13	2,606.24	3,909.36	8,295.82	45.00	367.00	167.00	69.00	648.00	3,254.24	4,557.36	8,943.82
14	2,806.72	4,210.08	8,933.96	45.00	367.00	167.00	69.00	648.00	3,454.72	4,858.08	9,581.96
15	3,007.20	4,510.80	9,572.10	45.00	367.00	167.00	69.00	648.00	3,655.20	5,158.80	10,220.10
16	3,207.68	4,811.52	10,210.24	45.00	367.00	167.00	69.00	648.00	3,855.68	5,459.52	10,858.24
17	3,408.16	5,112.24	10,848.38	45.00	367.00	167.00	69.00	648.00	4,056.16	5,760.24	11,496.38
18	3,608.64	5,412.96	11,486.52	45.00	367.00	167.00	69.00	648.00	4,256.64	6,060.96	12,134.52
19	3,809.12	5,713.68	12,124.66	45.00	367.00	167.00	69.00	648.00	4,457.12	6,361.68	12,772.66
20	4,009.60	6,014.40	12,762.80	45.00	367.00	167.00	69.00	648.00	4,657.60	6,662.40	13,410.80
21	4,210.08	6,315.12	13,400.94	45.00	367.00	167.00	69.00	648.00	4,858.08	6,963.12	14,048.94
22	4,410.56	6,615.84	14,039.08	45.00	367.00	167.00	69.00	648.00	5,058.56	7,263.84	14,687.08
23	4,611.04	6,916.56	14,677.22	45.00	367.00	167.00	69.00	648.00	5,259.04	7,564.56	15,325.22
24	4,811.52	7,217.28	15,315.36	45.00	367.00	167.00	69.00	648.00	5,459.52	7,865.28	15,963.36

Health Service Fee is optional for 1-5 credits.

A one time non-refundable **\$315** Matriculation Fee and a **\$40** Transcript For Life Fee is assessed on all new and transfer students.

\*International Students are required to be covered under a Major Medical Insurance Plan.

Qualified tuition and fees do not include the Student Health Service Fee for Tax Relief Act reporting.

*International Student*				
Medical Insurance Cost				
	Fall	Winter	Spring	Summer
Age 24 & under	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 25-30	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 31-40	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 41+	To Be Determined	To Be Determined	To Be Determined	To Be Determined

**2019 - 2020 Undergraduate Tuition and Fees (Summer) - Klamath Falls Campus**

Credit Hours	Tuition			Fees					Total Tuition & Fees Resident	Total Tuition & Fees WUE	Total Tuition & Fees Non-Resident
	\$200.48/cr Resident	\$300.72/cr WUE	\$638.14/cr Non-Res	Building	Incidental	Health Service Fee	Student Rec Center Fee	Total Fees			
1	200.48	200.48	200.48	34.00	70.00	0.00	69.00	173.00	373.48	373.48	373.48
2	400.96	400.96	400.96	34.00	70.00	0.00	69.00	173.00	573.96	573.96	573.96
3	601.44	601.44	601.44	34.00	70.00	60.00	69.00	233.00	834.44	834.44	834.44
4	801.92	801.92	801.92	34.00	70.00	60.00	69.00	233.00	1,034.92	1,034.92	1,034.92
5	1,002.40	1,002.40	1,002.40	34.00	70.00	60.00	69.00	233.00	1,235.40	1,235.40	1,235.40
6	1,202.88	1,202.88	1,202.88	34.00	70.00	60.00	69.00	233.00	1,435.88	1,435.88	1,435.88
7	1,403.36	2,105.04	4,466.98	34.00	70.00	60.00	69.00	233.00	1,636.36	2,338.04	4,699.98
8	1,603.84	2,405.76	5,105.12	34.00	70.00	60.00	69.00	233.00	1,836.84	2,638.76	5,338.12
9	1,804.32	2,706.48	5,743.26	34.00	70.00	60.00	69.00	233.00	2,037.32	2,939.48	5,976.26
10	2,004.80	3,007.20	6,381.40	34.00	70.00	60.00	69.00	233.00	2,237.80	3,240.20	6,614.40
11	2,205.28	3,307.92	7,019.54	34.00	70.00	60.00	69.00	233.00	2,438.28	3,540.92	7,252.54
12	2,405.76	3,608.64	7,657.68	34.00	70.00	60.00	69.00	233.00	2,638.76	3,841.64	7,890.68
13	2,606.24	3,909.36	8,295.82	34.00	70.00	60.00	69.00	233.00	2,839.24	4,142.36	8,528.82
14	2,806.72	4,210.08	8,933.96	34.00	70.00	60.00	69.00	233.00	3,039.72	4,443.08	9,166.96
15	3,007.20	4,510.80	9,572.10	34.00	70.00	60.00	69.00	233.00	3,240.20	4,743.80	9,805.10
16	3,207.68	4,811.52	10,210.24	34.00	70.00	60.00	69.00	233.00	3,440.68	5,044.52	10,443.24
17	3,408.16	5,112.24	10,848.38	34.00	70.00	60.00	69.00	233.00	3,641.16	5,345.24	11,081.38
18	3,608.64	5,412.96	11,486.52	34.00	70.00	60.00	69.00	233.00	3,841.64	5,645.96	11,719.52
19	3,809.12	5,713.68	12,124.66	34.00	70.00	60.00	69.00	233.00	4,042.12	5,946.68	12,357.66
20	4,009.60	6,014.40	12,762.80	34.00	70.00	60.00	69.00	233.00	4,242.60	6,247.40	12,995.80
21	4,210.08	6,315.12	13,400.94	34.00	70.00	60.00	69.00	233.00	4,443.08	6,548.12	13,633.94
22	4,410.56	6,615.84	14,039.08	34.00	70.00	60.00	69.00	233.00	4,643.56	6,848.84	14,272.08
23	4,611.04	6,916.56	14,677.22	34.00	70.00	60.00	69.00	233.00	4,844.04	7,149.56	14,910.22
24	4,811.52	7,217.28	15,315.36	34.00	70.00	60.00	69.00	233.00	5,044.52	7,450.28	15,548.36

Summer Health Service Fee is optional for 1-2 credits.

A one time non-refundable **\$315** Matriculation Fee and a **\$40** Transcript For Life Fee is assessed on all new and transfer students.

\*International Students are required to be covered under a Major Medical Insurance Plan.

Qualified tuition and fees do not include the Student Health Service Fee for Tax Relief Act reporting.

*International Student*				
Medical Insurance Cost				
	Fall	Winter	Spring	Summer
Age 24 & under	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 25-30	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 31-40	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 41+	To Be Determined	To Be Determined	To Be Determined	To Be Determined



**2019 - 2020 Undergraduate Tuition and Fees - Klamath Falls Campus (Engineering & Technology Majors)**

Credit Hours	Tuition			Fees					Total Tuition & Fees Resident	Total Tuition & Fees WUE	Total Tuition & Fees Non-Resident
	\$260.62/cr Resident	\$390.93/cr WUE	\$829.58/cr Non-Res	Building	Incidental	Health Service Fee	Student Rec Center Fee	Total Fees			
1	260.62	260.62	260.62	23.00	192.00	0.00	69.00	284.00	544.62	544.62	544.62
2	521.24	521.24	521.24	25.00	227.00	0.00	69.00	321.00	842.24	842.24	842.24
3	781.86	781.86	781.86	27.00	262.00	0.00	69.00	358.00	1,139.86	1,139.86	1,139.86
4	1,042.48	1,042.48	1,042.48	29.00	297.00	0.00	69.00	395.00	1,437.48	1,437.48	1,437.48
5	1,303.10	1,303.10	1,303.10	31.00	332.00	0.00	69.00	432.00	1,735.10	1,735.10	1,735.10
6	1,563.72	1,563.72	1,563.72	33.00	367.00	167.00	69.00	636.00	2,199.72	2,199.72	2,199.72
7	1,824.34	2,736.51	5,807.06	35.00	367.00	167.00	69.00	638.00	2,462.34	3,374.51	6,445.06
8	2,084.96	3,127.44	6,636.64	37.00	367.00	167.00	69.00	640.00	2,724.96	3,767.44	7,276.64
9	2,345.58	3,518.37	7,466.22	39.00	367.00	167.00	69.00	642.00	2,987.58	4,160.37	8,108.22
10	2,606.20	3,909.30	8,295.80	41.00	367.00	167.00	69.00	644.00	3,250.20	4,553.30	8,939.80
11	2,866.82	4,300.23	9,125.38	43.00	367.00	167.00	69.00	646.00	3,512.82	4,946.23	9,771.38
12	3,127.44	4,691.16	9,954.96	45.00	367.00	167.00	69.00	648.00	3,775.44	5,339.16	10,602.96
13	3,388.06	5,082.09	10,784.54	45.00	367.00	167.00	69.00	648.00	4,036.06	5,730.09	11,432.54
14	3,648.68	5,473.02	11,614.12	45.00	367.00	167.00	69.00	648.00	4,296.68	6,121.02	12,262.12
15	3,909.30	5,863.95	12,443.70	45.00	367.00	167.00	69.00	648.00	4,557.30	6,511.95	13,091.70
16	4,169.92	6,254.88	13,273.28	45.00	367.00	167.00	69.00	648.00	4,817.92	6,902.88	13,921.28
17	4,430.54	6,645.81	14,102.86	45.00	367.00	167.00	69.00	648.00	5,078.54	7,293.81	14,750.86
18	4,691.16	7,036.74	14,932.44	45.00	367.00	167.00	69.00	648.00	5,339.16	7,684.74	15,580.44
19	4,951.78	7,427.67	15,762.02	45.00	367.00	167.00	69.00	648.00	5,599.78	8,075.67	16,410.02
20	5,212.40	7,818.60	16,591.60	45.00	367.00	167.00	69.00	648.00	5,860.40	8,466.60	17,239.60
21	5,473.02	8,209.53	17,421.18	45.00	367.00	167.00	69.00	648.00	6,121.02	8,857.53	18,069.18
22	5,733.64	8,600.46	18,250.76	45.00	367.00	167.00	69.00	648.00	6,381.64	9,248.46	18,898.76
23	5,994.26	8,991.39	19,080.34	45.00	367.00	167.00	69.00	648.00	6,642.26	9,639.39	19,728.34
24	6,254.88	9,382.32	19,909.92	45.00	367.00	167.00	69.00	648.00	6,902.88	10,030.32	20,557.92

Health Service Fee is optional for 1-5 credits.

A one time non-refundable **\$315** Matriculation Fee and a **\$40** Transcript For Life Fee is assessed on all new and transfer students.

\*International Students are required to be covered under a Major Medical Insurance Plan.

Qualified tuition and fees do not include the Student Health Service Fee for Tax Relief Act reporting.

*International Student*				
Medical Insurance Cost				
	Fall	Winter	Spring	Summer
Age 24 & under	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 25-30	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 31-40	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 41+	To Be Determined	To Be Determined	To Be Determined	To Be Determined

**2019 - 2020 Undergraduate Tuition and Fees - Klamath Falls Campus (Engineering & Technology Majors) Summer**

Credit Hours	Tuition			Fees					Total Tuition & Fees Resident	Total Tuition & Fees WUE	Total Tuition & Fees Non-Resident
	\$260.62/cr Resident	\$390.93/cr WUE	\$829.58/cr Non-Res	Building	Incidental	Health Service Fee	Student Rec Center Fee	Total Fees			
1	260.62	260.62	260.62	34.00	70.00	0.00	69.00	173.00	433.62	433.62	433.62
2	521.24	521.24	521.24	34.00	70.00	0.00	69.00	173.00	694.24	694.24	694.24
3	781.86	781.86	781.86	34.00	70.00	60.00	69.00	233.00	1,014.86	1,014.86	1,014.86
4	1,042.48	1,042.48	1,042.48	34.00	70.00	60.00	69.00	233.00	1,275.48	1,275.48	1,275.48
5	1,303.10	1,303.10	1,303.10	34.00	70.00	60.00	69.00	233.00	1,536.10	1,536.10	1,536.10
6	1,563.72	1,563.72	1,563.72	34.00	70.00	60.00	69.00	233.00	1,796.72	1,796.72	1,796.72
7	1,824.34	2,736.51	5,807.06	34.00	70.00	60.00	69.00	233.00	2,057.34	2,969.51	6,040.06
8	2,084.96	3,127.44	6,636.64	34.00	70.00	60.00	69.00	233.00	2,317.96	3,360.44	6,869.64
9	2,345.58	3,518.37	7,466.22	34.00	70.00	60.00	69.00	233.00	2,578.58	3,751.37	7,699.22
10	2,606.20	3,909.30	8,295.80	34.00	70.00	60.00	69.00	233.00	2,839.20	4,142.30	8,528.80
11	2,866.82	4,300.23	9,125.38	34.00	70.00	60.00	69.00	233.00	3,099.82	4,533.23	9,358.38
12	3,127.44	4,691.16	9,954.96	34.00	70.00	60.00	69.00	233.00	3,360.44	4,924.16	10,187.96
13	3,388.06	5,082.09	10,784.54	34.00	70.00	60.00	69.00	233.00	3,621.06	5,315.09	11,017.54
14	3,648.68	5,473.02	11,614.12	34.00	70.00	60.00	69.00	233.00	3,881.68	5,706.02	11,847.12
15	3,909.30	5,863.95	12,443.70	34.00	70.00	60.00	69.00	233.00	4,142.30	6,096.95	12,676.70
16	4,169.92	6,254.88	13,273.28	34.00	70.00	60.00	69.00	233.00	4,402.92	6,487.88	13,506.28
17	4,430.54	6,645.81	14,102.86	34.00	70.00	60.00	69.00	233.00	4,663.54	6,878.81	14,335.86
18	4,691.16	7,036.74	14,932.44	34.00	70.00	60.00	69.00	233.00	4,924.16	7,269.74	15,165.44
19	4,951.78	7,427.67	15,762.02	34.00	70.00	60.00	69.00	233.00	5,184.78	7,660.67	15,995.02
20	5,212.40	7,818.60	16,591.60	34.00	70.00	60.00	69.00	233.00	5,445.40	8,051.60	16,824.60
21	5,473.02	8,209.53	17,421.18	34.00	70.00	60.00	69.00	233.00	5,706.02	8,442.53	17,654.18
22	5,733.64	8,600.46	18,250.76	34.00	70.00	60.00	69.00	233.00	5,966.64	8,833.46	18,483.76
23	5,994.26	8,991.39	19,080.34	34.00	70.00	60.00	69.00	233.00	6,227.26	9,224.39	19,313.34
24	6,254.88	9,382.32	19,909.92	34.00	70.00	60.00	69.00	233.00	6,487.88	9,615.32	20,142.92

Summer Health Service Fee is optional for 1-2 credits.

**A one time non-refundable \$315 Matriculation Fee and a \$40 Transcript For Life Fee is assessed on all new and transfer students.**

\*International Students are required to be covered under a Major Medical Insurance Plan.

Qualified tuition and fees do not include the Student Health Service Fee for Tax Relief Act reporting.

*International Student*				
Medical Insurance Cost				
	Fall	Winter	Spring	Summer
Age 24 & under	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 25-30	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 31-40	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 41+	To Be Determined	To Be Determined	To Be Determined	To Be Determined



**2019 - 2020 Undergraduate Tuition and Fees - Klamath Falls Campus Allied Health Respiratory Care**

Credit Hours	Tuition			Fees					Total Tuition & Fees Resident	Total Tuition & Fees WUE	Total Tuition & Fees Non-Resident
	\$260.62/cr Resident	\$390.93/cr WUE	\$829.58/cr Non-Res	Building	Incidental	Health Service Fee	Student Rec Center Fee	Total Fees			
1	260.62	260.62	260.62	23.00	192.00	0.00	69.00	284.00	544.62	544.62	544.62
2	521.24	521.24	521.24	25.00	227.00	0.00	69.00	321.00	842.24	842.24	842.24
3	781.86	781.86	781.86	27.00	262.00	0.00	69.00	358.00	1,139.86	1,139.86	1,139.86
4	1,042.48	1,042.48	1,042.48	29.00	297.00	0.00	69.00	395.00	1,437.48	1,437.48	1,437.48
5	1,303.10	1,303.10	1,303.10	31.00	332.00	0.00	69.00	432.00	1,735.10	1,735.10	1,735.10
6	1,563.72	1,563.72	1,563.72	33.00	367.00	167.00	69.00	636.00	2,199.72	2,199.72	2,199.72
7	1,824.34	2,736.51	5,807.06	35.00	367.00	167.00	69.00	638.00	2,462.34	3,374.51	6,445.06
8	2,084.96	3,127.44	6,636.64	37.00	367.00	167.00	69.00	640.00	2,724.96	3,767.44	7,276.64
9	2,345.58	3,518.37	7,466.22	39.00	367.00	167.00	69.00	642.00	2,987.58	4,160.37	8,108.22
10	2,606.20	3,909.30	8,295.80	41.00	367.00	167.00	69.00	644.00	3,250.20	4,553.30	8,939.80
11	2,866.82	4,300.23	9,125.38	43.00	367.00	167.00	69.00	646.00	3,512.82	4,946.23	9,771.38
12	3,127.44	4,691.16	9,954.96	45.00	367.00	167.00	69.00	648.00	3,775.44	5,339.16	10,602.96
13	3,388.06	5,082.09	10,784.54	45.00	367.00	167.00	69.00	648.00	4,036.06	5,730.09	11,432.54
14	3,648.68	5,473.02	11,614.12	45.00	367.00	167.00	69.00	648.00	4,296.68	6,121.02	12,262.12
15	3,909.30	5,863.95	12,443.70	45.00	367.00	167.00	69.00	648.00	4,557.30	6,511.95	13,091.70
16	4,169.92	6,254.88	13,273.28	45.00	367.00	167.00	69.00	648.00	4,817.92	6,902.88	13,921.28
17	4,430.54	6,645.81	14,102.86	45.00	367.00	167.00	69.00	648.00	5,078.54	7,293.81	14,750.86
18	4,691.16	7,036.74	14,932.44	45.00	367.00	167.00	69.00	648.00	5,339.16	7,684.74	15,580.44
19	4,951.78	7,427.67	15,762.02	45.00	367.00	167.00	69.00	648.00	5,599.78	8,075.67	16,410.02
20	5,212.40	7,818.60	16,591.60	45.00	367.00	167.00	69.00	648.00	5,860.40	8,466.60	17,239.60
21	5,473.02	8,209.53	17,421.18	45.00	367.00	167.00	69.00	648.00	6,121.02	8,857.53	18,069.18
22	5,733.64	8,600.46	18,250.76	45.00	367.00	167.00	69.00	648.00	6,381.64	9,248.46	18,898.76
23	5,994.26	8,991.39	19,080.34	45.00	367.00	167.00	69.00	648.00	6,642.26	9,639.39	19,728.34
24	6,254.88	9,382.32	19,909.92	45.00	367.00	167.00	69.00	648.00	6,902.88	10,030.32	20,557.92

Health Service Fee is optional for 1-5 credits.

Allied Health Majors on externship are not charged the Incidental, Health Service Fee, and Student Rec Center Fee.

A one time non-refundable \$315 Matriculation Fee and a \$40 Transcript For Life Fee is assessed on all new and transfer students.

\*International Students are required to be covered under a Major Medical Insurance Plan.

Qualified tuition and fees do not include the Student Health Service Fee for Tax Relief Act reporting.

*International Student*				
Medical Insurance Cost				
	Fall	Winter	Spring	Summer
Age 24 & under	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 25-30	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 31-40	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 41+	To Be Determined	To Be Determined	To Be Determined	To Be Determined

**2019 - 2020 Undergraduate Tuition and Fees - Klamath Falls Campus Allied Health Respiratory Care(Summer)**

Credit Hours	Tuition			Fees					Total Tuition & Fees Resident	Total Tuition & Fees WUE	Total Tuition & Fees Non-Resident
	\$260.62/cr Resident	\$390.93/cr WUE	\$829.58/cr Non-Res	Building	Incidental	Health Service Fee	Student Rec Center Fee	Total Fees			
1	260.62	260.62	260.62	34.00	70.00	0.00	69.00	173.00	433.62	433.62	433.62
2	521.24	521.24	521.24	34.00	70.00	0.00	69.00	173.00	694.24	694.24	694.24
3	781.86	781.86	781.86	34.00	70.00	60.00	69.00	233.00	1,014.86	1,014.86	1,014.86
4	1,042.48	1,042.48	1,042.48	34.00	70.00	60.00	69.00	233.00	1,275.48	1,275.48	1,275.48
5	1,303.10	1,303.10	1,303.10	34.00	70.00	60.00	69.00	233.00	1,536.10	1,536.10	1,536.10
6	1,563.72	1,563.72	1,563.72	34.00	70.00	60.00	69.00	233.00	1,796.72	1,796.72	1,796.72
7	1,824.34	2,736.51	5,807.06	34.00	70.00	60.00	69.00	233.00	2,057.34	2,969.51	6,040.06
8	2,084.96	3,127.44	6,636.64	34.00	70.00	60.00	69.00	233.00	2,317.96	3,360.44	6,869.64
9	2,345.58	3,518.37	7,466.22	34.00	70.00	60.00	69.00	233.00	2,578.58	3,751.37	7,699.22
10	2,606.20	3,909.30	8,295.80	34.00	70.00	60.00	69.00	233.00	2,839.20	4,142.30	8,528.80
11	2,866.82	4,300.23	9,125.38	34.00	70.00	60.00	69.00	233.00	3,099.82	4,533.23	9,358.38
12	3,127.44	4,691.16	9,954.96	34.00	70.00	60.00	69.00	233.00	3,360.44	4,924.16	10,187.96
13	3,388.06	5,082.09	10,784.54	34.00	70.00	60.00	69.00	233.00	3,621.06	5,315.09	11,017.54
14	3,648.68	5,473.02	11,614.12	34.00	70.00	60.00	69.00	233.00	3,881.68	5,706.02	11,847.12
15	3,909.30	5,863.95	12,443.70	34.00	70.00	60.00	69.00	233.00	4,142.30	6,096.95	12,676.70
16	4,169.92	6,254.88	13,273.28	34.00	70.00	60.00	69.00	233.00	4,402.92	6,487.88	13,506.28
17	4,430.54	6,645.81	14,102.86	34.00	70.00	60.00	69.00	233.00	4,663.54	6,878.81	14,335.86
18	4,691.16	7,036.74	14,932.44	34.00	70.00	60.00	69.00	233.00	4,924.16	7,269.74	15,165.44
19	4,951.78	7,427.67	15,762.02	34.00	70.00	60.00	69.00	233.00	5,184.78	7,660.67	15,995.02
20	5,212.40	7,818.60	16,591.60	34.00	70.00	60.00	69.00	233.00	5,445.40	8,051.60	16,824.60
21	5,473.02	8,209.53	17,421.18	34.00	70.00	60.00	69.00	233.00	5,706.02	8,442.53	17,654.18
22	5,733.64	8,600.46	18,250.76	34.00	70.00	60.00	69.00	233.00	5,966.64	8,833.46	18,483.76
23	5,994.26	8,991.39	19,080.34	34.00	70.00	60.00	69.00	233.00	6,227.26	9,224.39	19,313.34
24	6,254.88	9,382.32	19,909.92	34.00	70.00	60.00	69.00	233.00	6,487.88	9,615.32	20,142.92

Summer Health Service Fee is optional for 1-2 credits.

Allied Health Majors on externship are not charged the Incidental, Health Service Fee, and Student Rec Center Fee.

A one time non-refundable **\$315** Matriculation Fee and a **\$40** Transcript For Life Fee is assessed on all new and transfer students.

\*International Students are required to be covered under a Major Medical Insurance Plan.

Qualified tuition and fees do not include the Student Health Service Fee for Tax Relief Act reporting.

*International Student*				
Medical Insurance Cost				
	Fall	Winter	Spring	Summer
Age 24 & under	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 25-30	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 31-40	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 41+	To Be Determined	To Be Determined	To Be Determined	To Be Determined



### 2019 - 2020 Undergraduate Tuition and Fees - Klamath Falls Campus (Allied Health Majors)

\*Dental Hygiene, Pre-Dental Hygiene, Diagnostic Medical Sonography, Echocardiography, Nuclear Medicine Technology, Radiologic Science, Vascular Technology, and all Pre-MIT programs DO NOT QUALIFY FOR WUE RATES. For Respiratory Care Rates see Previous Pages.

Credit Hours	Tuition		Fees					Total Tuition & Fees Resident	Total Tuition & Fees Non-Resident
	\$260.62/cr Resident	\$829.58/cr Non-Res	Building	Incidental	Health Service Fee	Student Rec Center Fee	Total Fees		
1	260.62	260.62	23.00	192.00	0.00	69.00	284.00	544.62	544.62
2	521.24	521.24	25.00	227.00	0.00	69.00	321.00	842.24	842.24
3	781.86	781.86	27.00	262.00	0.00	69.00	358.00	1,139.86	1,139.86
4	1,042.48	1,042.48	29.00	297.00	0.00	69.00	395.00	1,437.48	1,437.48
5	1,303.10	1,303.10	31.00	332.00	0.00	69.00	432.00	1,735.10	1,735.10
6	1,563.72	1,563.72	33.00	367.00	167.00	69.00	636.00	2,199.72	2,199.72
7	1,824.34	5,807.06	35.00	367.00	167.00	69.00	638.00	2,462.34	6,445.06
8	2,084.96	6,636.64	37.00	367.00	167.00	69.00	640.00	2,724.96	7,276.64
9	2,345.58	7,466.22	39.00	367.00	167.00	69.00	642.00	2,987.58	8,108.22
10	2,606.20	8,295.80	41.00	367.00	167.00	69.00	644.00	3,250.20	8,939.80
11	2,866.82	9,125.38	43.00	367.00	167.00	69.00	646.00	3,512.82	9,771.38
12	3,127.44	9,954.96	45.00	367.00	167.00	69.00	648.00	3,775.44	10,602.96
13	3,388.06	10,784.54	45.00	367.00	167.00	69.00	648.00	4,036.06	11,432.54
14	3,648.68	11,614.12	45.00	367.00	167.00	69.00	648.00	4,296.68	12,262.12
15	3,909.30	12,443.70	45.00	367.00	167.00	69.00	648.00	4,557.30	13,091.70
16	4,169.92	13,273.28	45.00	367.00	167.00	69.00	648.00	4,817.92	13,921.28
17	4,430.54	14,102.86	45.00	367.00	167.00	69.00	648.00	5,078.54	14,750.86
18	4,691.16	14,932.44	45.00	367.00	167.00	69.00	648.00	5,339.16	15,580.44
19	4,951.78	15,762.02	45.00	367.00	167.00	69.00	648.00	5,599.78	16,410.02
20	5,212.40	16,591.60	45.00	367.00	167.00	69.00	648.00	5,860.40	17,239.60
21	5,473.02	17,421.18	45.00	367.00	167.00	69.00	648.00	6,121.02	18,069.18
22	5,733.64	18,250.76	45.00	367.00	167.00	69.00	648.00	6,381.64	18,898.76
23	5,994.26	19,080.34	45.00	367.00	167.00	69.00	648.00	6,642.26	19,728.34
24	6,254.88	19,909.92	45.00	367.00	167.00	69.00	648.00	6,902.88	20,557.92

Health Service Fee is optional for 1-5 credits.

Allied Health Majors on externship are not charged the Incidental, Health Service Fee, and Student Rec Center Fee.

A one time non-refundable **\$315** Matriculation Fee and a **\$40** Transcript For Life Fee is assessed on all new and transfer students.

\*International Students are required to be covered under a Major Medical Insurance Plan.

Qualified tuition and fees do not include the Student Health Service Fee for Tax Relief Act reporting.

*International Student*				
Medical Insurance Cost				
	Fall	Winter	Spring	Summer
Age 24 & under	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 25-30	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 31-40	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 41+	To Be Determined	To Be Determined	To Be Determined	To Be Determined

### 2019 - 2020 Undergraduate Tuition and Fees - Klamath Falls Campus (Allied Health Majors) Summer

\*Dental Hygiene, Pre-Dental Hygiene, Diagnostic Medical Sonography, Echocardiography, Nuclear Medicine Technology, Radiologic Science, Vascular Technology, and all Pre-MIT programs DO NOT QUALIFY FOR WUE RATES. For Respiratory Care Rates see Previous Pages.

Credit Hours	Tuition		Fees					Total Tuition & Fees Resident	Total Tuition & Fees Non-Resident
	\$260.62/cr Resident	\$829.58/cr Non-Res	Building	Incidental	Health Service Fee	Student Rec Center Fee	Total Fees		
1	260.62	260.62	34.00	70.00	0.00	69.00	173.00	433.62	433.62
2	521.24	521.24	34.00	70.00	0.00	69.00	173.00	694.24	694.24
3	781.86	781.86	34.00	70.00	60.00	69.00	233.00	1,014.86	1,014.86
4	1,042.48	1,042.48	34.00	70.00	60.00	69.00	233.00	1,275.48	1,275.48
5	1,303.10	1,303.10	34.00	70.00	60.00	69.00	233.00	1,536.10	1,536.10
6	1,563.72	1,563.72	34.00	70.00	60.00	69.00	233.00	1,796.72	1,796.72
7	1,824.34	1,824.34	34.00	70.00	60.00	69.00	233.00	2,057.34	2,057.34
8	2,084.96	2,084.96	34.00	70.00	60.00	69.00	233.00	2,317.96	2,317.96
9	2,345.58	2,345.58	34.00	70.00	60.00	69.00	233.00	2,578.58	2,578.58
10	2,606.20	2,606.20	34.00	70.00	60.00	69.00	233.00	2,839.20	2,839.20
11	2,866.82	2,866.82	34.00	70.00	60.00	69.00	233.00	3,099.82	3,099.82
12	3,127.44	3,127.44	34.00	70.00	60.00	69.00	233.00	3,360.44	3,360.44
13	3,388.06	3,388.06	34.00	70.00	60.00	69.00	233.00	3,621.06	3,621.06
14	3,648.68	3,648.68	34.00	70.00	60.00	69.00	233.00	3,881.68	3,881.68
15	3,909.30	3,909.30	34.00	70.00	60.00	69.00	233.00	4,142.30	4,142.30
16	4,169.92	4,169.92	34.00	70.00	60.00	69.00	233.00	4,402.92	4,402.92
17	4,430.54	4,430.54	34.00	70.00	60.00	69.00	233.00	4,663.54	4,663.54
18	4,691.16	4,691.16	34.00	70.00	60.00	69.00	233.00	4,924.16	4,924.16
19	4,951.78	4,951.78	34.00	70.00	60.00	69.00	233.00	5,184.78	5,184.78
20	5,212.40	5,212.40	34.00	70.00	60.00	69.00	233.00	5,445.40	5,445.40
21	5,473.02	5,473.02	34.00	70.00	60.00	69.00	233.00	5,706.02	5,706.02
22	5,733.64	5,733.64	34.00	70.00	60.00	69.00	233.00	5,966.64	5,966.64
23	5,994.26	5,994.26	34.00	70.00	60.00	69.00	233.00	6,227.26	6,227.26
24	6,254.88	6,254.88	34.00	70.00	60.00	69.00	233.00	6,487.88	6,487.88

Summer Health Service Fee is optional for 1-2 credits.

**Allied Health Majors on externship are not charged the Incidental, Health Service Fee, and Student Rec Center Fee.**

**A one time non-refundable \$315 Matriculation Fee and a \$40 Transcript For Life Fee is assessed on all new and transfer students.**

\*International Students are required to be covered under a Major Medical Insurance Plan.

Qualified tuition and fees do not include the Student Health Service Fee for Tax Relief Act reporting.

*International Student*				
Medical Insurance Cost				
	Fall	Winter	Spring	Summer
Age 24 & under	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 25-30	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 31-40	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 41+	To Be Determined	To Be Determined	To Be Determined	To Be Determined



**2019 - 2020 Undergraduate Tuition and Fees - Portland-Metro Campus**

Credit Hours	Tuition			Fees				Total Tuition & Fees Resident	Total Tuition & Fees WUE	Total Tuition & Fees Non-Resident
	\$200.48/cr Resident	\$300.72/cr WUE	\$638.14/cr Non-Res	Building	Incidental	Health Service Fee	Total Fees			
1	200.48	200.48	200.48	23.00	50.00	40.00	113.00	313.48	313.48	313.48
2	400.96	400.96	400.96	25.00	50.00	40.00	115.00	515.96	515.96	515.96
3	601.44	601.44	601.44	27.00	50.00	40.00	117.00	718.44	718.44	718.44
4	801.92	801.92	801.92	29.00	50.00	40.00	119.00	920.92	920.92	920.92
5	1,002.40	1,002.40	1,002.40	31.00	50.00	40.00	121.00	1,123.40	1,123.40	1,123.40
6	1,202.88	1,202.88	1,202.88	33.00	50.00	40.00	123.00	1,325.88	1,325.88	1,325.88
7	1,403.36	2,105.04	4,466.98	35.00	50.00	40.00	125.00	1,528.36	2,230.04	4,591.98
8	1,603.84	2,405.76	5,105.12	37.00	50.00	40.00	127.00	1,730.84	2,532.76	5,232.12
9	1,804.32	2,706.48	5,743.26	39.00	50.00	40.00	129.00	1,933.32	2,835.48	5,872.26
10	2,004.80	3,007.20	6,381.40	41.00	50.00	40.00	131.00	2,135.80	3,138.20	6,512.40
11	2,205.28	3,307.92	7,019.54	43.00	50.00	40.00	133.00	2,338.28	3,440.92	7,152.54
12	2,405.76	3,608.64	7,657.68	45.00	50.00	40.00	135.00	2,540.76	3,743.64	7,792.68
13	2,606.24	3,909.36	8,295.82	45.00	50.00	40.00	135.00	2,741.24	4,044.36	8,430.82
14	2,806.72	4,210.08	8,933.96	45.00	50.00	40.00	135.00	2,941.72	4,345.08	9,068.96
15	3,007.20	4,510.80	9,572.10	45.00	50.00	40.00	135.00	3,142.20	4,645.80	9,707.10
16	3,207.68	4,811.52	10,210.24	45.00	50.00	40.00	135.00	3,342.68	4,946.52	10,345.24
17	3,408.16	5,112.24	10,848.38	45.00	50.00	40.00	135.00	3,543.16	5,247.24	10,983.38
18	3,608.64	5,412.96	11,486.52	45.00	50.00	40.00	135.00	3,743.64	5,547.96	11,621.52
19	3,809.12	5,713.68	12,124.66	45.00	50.00	40.00	135.00	3,944.12	5,848.68	12,259.66
20	4,009.60	6,014.40	12,762.80	45.00	50.00	40.00	135.00	4,144.60	6,149.40	12,897.80
21	4,210.08	6,315.12	13,400.94	45.00	50.00	40.00	135.00	4,345.08	6,450.12	13,535.94
22	4,410.56	6,615.84	14,039.08	45.00	50.00	40.00	135.00	4,545.56	6,750.84	14,174.08
23	4,611.04	6,916.56	14,677.22	45.00	50.00	40.00	135.00	4,746.04	7,051.56	14,812.22
24	4,811.52	7,217.28	15,315.36	45.00	50.00	40.00	135.00	4,946.52	7,352.28	15,450.36

A one time non-refundable **\$315** Matriculation Fee and a **\$40** Transcript For Life Fee is assessed on all new and transfer students.

\*International Students are required to be covered under a Major Medical Insurance Plan.

Qualified tuition and fees do not include the Student Health Service Fee for Tax Relief Act reporting.

*International Student*				
Medical Insurance Cost				
	Fall	Winter	Spring	Summer
Age 24 & Under	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 25-30	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 31-40	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 41+	To Be Determined	To Be Determined	To Be Determined	To Be Determined

**2019 - 2020 Undergraduate Tuition and Fees - Portland-Metro Campus Summer**

Credit Hours	Tuition			Fees				Total Tuition & Fees Resident	Total Tuition & Fees WUE	Total Tuition & Fees Non-Resident
	\$200.48/cr Resident	\$300.72/cr WUE	\$638.14/cr Non-Res	Building	Incidental	Health Service Fee	Total Fees			
1	200.48	200.48	200.48	34.00	50.00	40.00	124.00	324.48	324.48	324.48
2	400.96	400.96	400.96	34.00	50.00	40.00	124.00	524.96	524.96	524.96
3	601.44	601.44	601.44	34.00	50.00	40.00	124.00	725.44	725.44	725.44
4	801.92	801.92	801.92	34.00	50.00	40.00	124.00	925.92	925.92	925.92
5	1,002.40	1,002.40	1,002.40	34.00	50.00	40.00	124.00	1,126.40	1,126.40	1,126.40
6	1,202.88	1,202.88	1,202.88	34.00	50.00	40.00	124.00	1,326.88	1,326.88	1,326.88
7	1,403.36	2,105.04	4,466.98	34.00	50.00	40.00	124.00	1,527.36	2,229.04	4,590.98
8	1,603.84	2,405.76	5,105.12	34.00	50.00	40.00	124.00	1,727.84	2,529.76	5,229.12
9	1,804.32	2,706.48	5,743.26	34.00	50.00	40.00	124.00	1,928.32	2,830.48	5,867.26
10	2,004.80	3,007.20	6,381.40	34.00	50.00	40.00	124.00	2,128.80	3,131.20	6,505.40
11	2,205.28	3,307.92	7,019.54	34.00	50.00	40.00	124.00	2,329.28	3,431.92	7,143.54
12	2,405.76	3,608.64	7,657.68	34.00	50.00	40.00	124.00	2,529.76	3,732.64	7,781.68
13	2,606.24	3,909.36	8,295.82	34.00	50.00	40.00	124.00	2,730.24	4,033.36	8,419.82
14	2,806.72	4,210.08	8,933.96	34.00	50.00	40.00	124.00	2,930.72	4,334.08	9,057.96
15	3,007.20	4,510.80	9,572.10	34.00	50.00	40.00	124.00	3,131.20	4,634.80	9,696.10
16	3,207.68	4,811.52	10,210.24	34.00	50.00	40.00	124.00	3,331.68	4,935.52	10,334.24
17	3,408.16	5,112.24	10,848.38	34.00	50.00	40.00	124.00	3,532.16	5,236.24	10,972.38
18	3,608.64	5,412.96	11,486.52	34.00	50.00	40.00	124.00	3,732.64	5,536.96	11,610.52
19	3,809.12	5,713.68	12,124.66	34.00	50.00	40.00	124.00	3,933.12	5,837.68	12,248.66
20	4,009.60	6,014.40	12,762.80	34.00	50.00	40.00	124.00	4,133.60	6,138.40	12,886.80
21	4,210.08	6,315.12	13,400.94	34.00	50.00	40.00	124.00	4,334.08	6,439.12	13,524.94
22	4,410.56	6,615.84	14,039.08	34.00	50.00	40.00	124.00	4,534.56	6,739.84	14,163.08
23	4,611.04	6,916.56	14,677.22	34.00	50.00	40.00	124.00	4,735.04	7,040.56	14,801.22
24	4,811.52	7,217.28	15,315.36	34.00	50.00	40.00	124.00	4,935.52	7,341.28	15,439.36

A one time non-refundable **\$315** Matriculation Fee and a **\$40** Transcript For Life Fee is assessed on all new and transfer students.

\*International Students are required to be covered under a Major Medical Insurance Plan.

Qualified tuition and fees do not include the Student Health Service Fee for Tax Relief Act reporting.

*International Student*				
Medical Insurance Cost				
	Fall	Winter	Spring	Summer
Age 24 & Under	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 25-30	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 31-40	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 41+	To Be Determined	To Be Determined	To Be Determined	To Be Determined



### 2019 - 2020 Undergraduate Tuition and Fees - Portland-Metro Campus (Engineering & Technology Majors)

Credit Hours	Tuition			Fees				Total Tuition & Fees Resident	Total Tuition & Fees WUE	Total Tuition & Fees Non-Resident
	\$260.62/cr Resident	\$390.93/cr WUE	\$829.58/cr Non-Res	Building	Incidental	Health Service Fee	Total Fees			
1	260.62	260.62	260.62	23.00	50.00	40.00	113.00	373.62	373.62	373.62
2	521.24	521.24	521.24	25.00	50.00	40.00	115.00	636.24	636.24	636.24
3	781.86	781.86	781.86	27.00	50.00	40.00	117.00	898.86	898.86	898.86
4	1,042.48	1,042.48	1,042.48	29.00	50.00	40.00	119.00	1,161.48	1,161.48	1,161.48
5	1,303.10	1,303.10	1,303.10	31.00	50.00	40.00	121.00	1,424.10	1,424.10	1,424.10
6	1,563.72	1,563.72	1,563.72	33.00	50.00	40.00	123.00	1,686.72	1,686.72	1,686.72
7	1,824.34	2,736.51	5,807.06	35.00	50.00	40.00	125.00	1,949.34	2,861.51	5,932.06
8	2,084.96	3,127.44	6,636.64	37.00	50.00	40.00	127.00	2,211.96	3,254.44	6,763.64
9	2,345.58	3,518.37	7,466.22	39.00	50.00	40.00	129.00	2,474.58	3,647.37	7,595.22
10	2,606.20	3,909.30	8,295.80	41.00	50.00	40.00	131.00	2,737.20	4,040.30	8,426.80
11	2,866.82	4,300.23	9,125.38	43.00	50.00	40.00	133.00	2,999.82	4,433.23	9,258.38
12	3,127.44	4,691.16	9,954.96	45.00	50.00	40.00	135.00	3,262.44	4,826.16	10,089.96
13	3,388.06	5,082.09	10,784.54	45.00	50.00	40.00	135.00	3,523.06	5,217.09	10,919.54
14	3,648.68	5,473.02	11,614.12	45.00	50.00	40.00	135.00	3,783.68	5,608.02	11,749.12
15	3,909.30	5,863.95	12,443.70	45.00	50.00	40.00	135.00	4,044.30	5,998.95	12,578.70
16	4,169.92	6,254.88	13,273.28	45.00	50.00	40.00	135.00	4,304.92	6,389.88	13,408.28
17	4,430.54	6,645.81	14,102.86	45.00	50.00	40.00	135.00	4,565.54	6,780.81	14,237.86
18	4,691.16	7,036.74	14,932.44	45.00	50.00	40.00	135.00	4,826.16	7,171.74	15,067.44
19	4,951.78	7,427.67	15,762.02	45.00	50.00	40.00	135.00	5,086.78	7,562.67	15,897.02
20	5,212.40	7,818.60	16,591.60	45.00	50.00	40.00	135.00	5,347.40	7,953.60	16,726.60
21	5,473.02	8,209.53	17,421.18	45.00	50.00	40.00	135.00	5,608.02	8,344.53	17,556.18
22	5,733.64	8,600.46	18,250.76	45.00	50.00	40.00	135.00	5,868.64	8,735.46	18,385.76
23	5,994.26	8,991.39	19,080.34	45.00	50.00	40.00	135.00	6,129.26	9,126.39	19,215.34
24	6,254.88	9,382.32	19,909.92	45.00	50.00	40.00	135.00	6,389.88	9,517.32	20,044.92

A one time non-refundable **\$315** Matriculation Fee and a **\$40** Transcript For Life Fee is assessed on all new and transfer students.

\*International Students are required to be covered under a Major Medical Insurance Plan.

Qualified tuition and fees do not include the Student Health Service Fee for Tax Relief Act reporting.

*International Student*				
Medical Insurance Cost				
	Fall	Winter	Spring	Summer
Age 24 & under	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 25-30	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 31-40	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 41+	To Be Determined	To Be Determined	To Be Determined	To Be Determined

### 2019 - 2020 Undergraduate Tuition and Fees - Portland-Metro Campus (Engineering & Technology Majors) Summer

Credit Hours	Tuition			Fees				Total	Total	Total
	\$260.62/cr Resident	\$390.93/cr WUE	\$829.58/cr Non-Res	Building	Incidental	Health Service Fee	Total Fees	Tuition & Fees Resident	Tuition & Fees WUE	Tuition & Fees Non-Resident
1	260.62	260.62	260.62	34.00	50.00	40.00	124.00	384.62	384.62	384.62
2	521.24	521.24	521.24	34.00	50.00	40.00	124.00	645.24	645.24	645.24
3	781.86	781.86	781.86	34.00	50.00	40.00	124.00	905.86	905.86	905.86
4	1,042.48	1,042.48	1,042.48	34.00	50.00	40.00	124.00	1,166.48	1,166.48	1,166.48
5	1,303.10	1,303.10	1,303.10	34.00	50.00	40.00	124.00	1,427.10	1,427.10	1,427.10
6	1,563.72	1,563.72	1,563.72	34.00	50.00	40.00	124.00	1,687.72	1,687.72	1,687.72
7	1,824.34	2,736.51	5,807.06	34.00	50.00	40.00	124.00	1,948.34	2,860.51	5,931.06
8	2,084.96	3,127.44	6,636.64	34.00	50.00	40.00	124.00	2,208.96	3,251.44	6,760.64
9	2,345.58	3,518.37	7,466.22	34.00	50.00	40.00	124.00	2,469.58	3,642.37	7,590.22
10	2,606.20	3,909.30	8,295.80	34.00	50.00	40.00	124.00	2,730.20	4,033.30	8,419.80
11	2,866.82	4,300.23	9,125.38	34.00	50.00	40.00	124.00	2,990.82	4,424.23	9,249.38
12	3,127.44	4,691.16	9,954.96	34.00	50.00	40.00	124.00	3,251.44	4,815.16	10,078.96
13	3,388.06	5,082.09	10,784.54	34.00	50.00	40.00	124.00	3,512.06	5,206.09	10,908.54
14	3,648.68	5,473.02	11,614.12	34.00	50.00	40.00	124.00	3,772.68	5,597.02	11,738.12
15	3,909.30	5,863.95	12,443.70	34.00	50.00	40.00	124.00	4,033.30	5,987.95	12,567.70
16	4,169.92	6,254.88	13,273.28	34.00	50.00	40.00	124.00	4,293.92	6,378.88	13,397.28
17	4,430.54	6,645.81	14,102.86	34.00	50.00	40.00	124.00	4,554.54	6,769.81	14,226.86
18	4,691.16	7,036.74	14,932.44	34.00	50.00	40.00	124.00	4,815.16	7,160.74	15,056.44
19	4,951.78	7,427.67	15,762.02	34.00	50.00	40.00	124.00	5,075.78	7,551.67	15,886.02
20	5,212.40	7,818.60	16,591.60	34.00	50.00	40.00	124.00	5,336.40	7,942.60	16,715.60
21	5,473.02	8,209.53	17,421.18	34.00	50.00	40.00	124.00	5,597.02	8,333.53	17,545.18
22	5,733.64	8,600.46	18,250.76	34.00	50.00	40.00	124.00	5,857.64	8,724.46	18,374.76
23	5,994.26	8,991.39	19,080.34	34.00	50.00	40.00	124.00	6,118.26	9,115.39	19,204.34
24	6,254.88	9,382.32	19,909.92	34.00	50.00	40.00	124.00	6,378.88	9,506.32	20,033.92

A one time non-refundable **\$315** Matriculation Fee and a **\$40** Transcript For Life Fee is assessed on all new and transfer students.

\*International Students are required to be covered under a Major Medical Insurance Plan.

Qualified tuition and fees do not include the Student Health Service Fee for Tax Relief Act reporting.

*International Student*				
Medical Insurance Cost				
	Fall	Winter	Spring	Summer
Age 24 & Under	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 25-30	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 31-40	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 41+	To Be Determined	To Be Determined	To Be Determined	To Be Determined



### 2019 - 2020 Undergraduate Tuition and Fees - Portland-Metro Campus (Allied Health Majors)

\*Dental Hygiene, Pre-Dental Hygiene, Diagnostic Medical Sonography, Echocardiography, Nuclear Medicine Technology, Radiologic Science, Vascular Technology, and all Pre-MIT programs DO NOT QUALIFY FOR WUE RATES. For Respiratory Care Rates see Previous Pages.

Credit Hours	Tuition		Fees				Total Tuition & Fees Resident	Total Tuition & Fees Non-Resident
	\$260.62/cr Resident	\$829.58/cr Non-Res	Building	Incidental	Health Service Fee	Total Fees		
1	260.62	260.62	23.00	50.00	40.00	113.00	373.62	373.62
2	521.24	521.24	25.00	50.00	40.00	115.00	636.24	636.24
3	781.86	781.86	27.00	50.00	40.00	117.00	898.86	898.86
4	1,042.48	1,042.48	29.00	50.00	40.00	119.00	1,161.48	1,161.48
5	1,303.10	1,303.10	31.00	50.00	40.00	121.00	1,424.10	1,424.10
6	1,563.72	1,563.72	33.00	50.00	40.00	123.00	1,686.72	1,686.72
7	1,824.34	5,807.06	35.00	50.00	40.00	125.00	1,949.34	5,932.06
8	2,084.96	6,636.64	37.00	50.00	40.00	127.00	2,211.96	6,763.64
9	2,345.58	7,466.22	39.00	50.00	40.00	129.00	2,474.58	7,595.22
10	2,606.20	8,295.80	41.00	50.00	40.00	131.00	2,737.20	8,426.80
11	2,866.82	9,125.38	43.00	50.00	40.00	133.00	2,999.82	9,258.38
12	3,127.44	9,954.96	45.00	50.00	40.00	135.00	3,262.44	10,089.96
13	3,388.06	10,784.54	45.00	50.00	40.00	135.00	3,523.06	10,919.54
14	3,648.68	11,614.12	45.00	50.00	40.00	135.00	3,783.68	11,749.12
15	3,909.30	12,443.70	45.00	50.00	40.00	135.00	4,044.30	12,578.70
16	4,169.92	13,273.28	45.00	50.00	40.00	135.00	4,304.92	13,408.28
17	4,430.54	14,102.86	45.00	50.00	40.00	135.00	4,565.54	14,237.86
18	4,691.16	14,932.44	45.00	50.00	40.00	135.00	4,826.16	15,067.44
19	4,951.78	15,762.02	45.00	50.00	40.00	135.00	5,086.78	15,897.02
20	5,212.40	16,591.60	45.00	50.00	40.00	135.00	5,347.40	16,726.60
21	5,473.02	17,421.18	45.00	50.00	40.00	135.00	5,608.02	17,556.18
22	5,733.64	18,250.76	45.00	50.00	40.00	135.00	5,868.64	18,385.76
23	5,994.26	19,080.34	45.00	50.00	40.00	135.00	6,129.26	19,215.34
24	6,254.88	19,909.92	45.00	50.00	40.00	135.00	6,389.88	20,044.92

A one time non-refundable **\$315** Matriculation Fee and a **\$40** Transcript For Life Fee is assessed on all new and transfer students.

\*International Students are required to be covered under a Major Medical Insurance Plan.

Qualified tuition and fees do not include the Student Health Service Fee for Tax Relief Act reporting.

*International Student*				
Medical Insurance Cost				
	Fall	Winter	Spring	Summer
Age 24 & under	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 25-30	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 31-40	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 41+	To Be Determined	To Be Determined	To Be Determined	To Be Determined

### 2019 - 2020 Undergraduate Tuition and Fees - Portland-Metro Campus (Allied Health Majors) Summer

\*Dental Hygiene, Pre-Dental Hygiene, Diagnostic Medical Sonography, Echocardiography, Nuclear Medicine Technology, Radiologic Science, Vascular Technology, and all Pre-MIT programs DO NOT QUALIFY FOR WUE RATES. For Respiratory Care Rates see Previous Pages.

Credit Hours	Tuition		Fees				Total Tuition & Fees Resident	Total Tuition & Fees Non-Resident
	\$260.62/cr Resident	\$829.58/cr Non-Res	Building	Incidental	Health Service Fee	Total Fees		
1	260.62	260.62	34.00	50.00	40.00	124.00	384.62	384.62
2	521.24	521.24	34.00	50.00	40.00	124.00	645.24	645.24
3	781.86	781.86	34.00	50.00	40.00	124.00	905.86	905.86
4	1,042.48	1,042.48	34.00	50.00	40.00	124.00	1,166.48	1,166.48
5	1,303.10	1,303.10	34.00	50.00	40.00	124.00	1,427.10	1,427.10
6	1,563.72	1,563.72	34.00	50.00	40.00	124.00	1,687.72	1,687.72
7	1,824.34	5,807.06	34.00	50.00	40.00	124.00	1,948.34	5,931.06
8	2,084.96	6,636.64	34.00	50.00	40.00	124.00	2,208.96	6,760.64
9	2,345.58	7,466.22	34.00	50.00	40.00	124.00	2,469.58	7,590.22
10	2,606.20	8,295.80	34.00	50.00	40.00	124.00	2,730.20	8,419.80
11	2,866.82	9,125.38	34.00	50.00	40.00	124.00	2,990.82	9,249.38
12	3,127.44	9,954.96	34.00	50.00	40.00	124.00	3,251.44	10,078.96
13	3,388.06	10,784.54	34.00	50.00	40.00	124.00	3,512.06	10,908.54
14	3,648.68	11,614.12	34.00	50.00	40.00	124.00	3,772.68	11,738.12
15	3,909.30	12,443.70	34.00	50.00	40.00	124.00	4,033.30	12,567.70
16	4,169.92	13,273.28	34.00	50.00	40.00	124.00	4,293.92	13,397.28
17	4,430.54	14,102.86	34.00	50.00	40.00	124.00	4,554.54	14,226.86
18	4,691.16	14,932.44	34.00	50.00	40.00	124.00	4,815.16	15,056.44
19	4,951.78	15,762.02	34.00	50.00	40.00	124.00	5,075.78	15,886.02
20	5,212.40	16,591.60	34.00	50.00	40.00	124.00	5,336.40	16,715.60
21	5,473.02	17,421.18	34.00	50.00	40.00	124.00	5,597.02	17,545.18
22	5,733.64	18,250.76	34.00	50.00	40.00	124.00	5,857.64	18,374.76
23	5,994.26	19,080.34	34.00	50.00	40.00	124.00	6,118.26	19,204.34
24	6,254.88	19,909.92	34.00	50.00	40.00	124.00	6,378.88	20,033.92

A one time non-refundable **\$315** Matriculation Fee and a **\$40** Transcript For Life Fee is assessed on all new and transfer students.

\*International Students are required to be covered under a Major Medical Insurance Plan.

Qualified tuition and fees do not include the Student Health Service Fee for Tax Relief Act reporting.

*International Student*				
Medical Insurance Cost				
	Fall	Winter	Spring	Summer
Age 24 & under	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 25-30	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 31-40	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 41+	To Be Determined	To Be Determined	To Be Determined	To Be Determined



**2019 - 2020 Graduate Tuition and Fees - Klamath Falls Campus**

Credit Hours	Tuition		Fees					Total Tuition & Fees Resident	Total Tuition & Fees Non-Resident
	\$448.43/cr Resident	\$752.78/CR Non-Res	Building	Incidental	Health Service Fee	Student Rec Center Fee	Total Fees		
1	448.43	448.43	23.00	192.00	0.00	69.00	284.00	732.43	1,180.86
2	896.86	896.86	25.00	227.00	0.00	69.00	321.00	1,217.86	2,114.72
3	1,345.29	1,345.29	27.00	262.00	0.00	69.00	358.00	1,703.29	3,048.58
4	1,793.72	1,793.72	29.00	297.00	0.00	69.00	395.00	2,188.72	3,982.44
5	2,242.15	2,242.15	31.00	332.00	0.00	69.00	432.00	2,674.15	4,916.30
6	2,690.58	2,690.58	33.00	367.00	167.00	69.00	636.00	3,326.58	6,017.16
7	3,139.01	5,269.46	35.00	367.00	167.00	69.00	638.00	3,777.01	5,907.46
8	3,587.44	6,022.24	37.00	367.00	167.00	69.00	640.00	4,227.44	6,662.24
9	4,035.87	6,775.02	39.00	367.00	167.00	69.00	642.00	4,677.87	7,417.02
10	4,484.30	7,527.80	41.00	367.00	167.00	69.00	644.00	5,128.30	8,171.80
11	4,932.73	8,280.58	43.00	367.00	167.00	69.00	646.00	5,578.73	8,926.58
12	5,381.16	9,033.36	45.00	367.00	167.00	69.00	648.00	6,029.16	9,681.36
13	5,829.59	9,786.14	45.00	367.00	167.00	69.00	648.00	6,477.59	10,434.14
14	6,278.02	10,538.92	45.00	367.00	167.00	69.00	648.00	6,926.02	11,186.92
15	6,726.45	11,291.70	45.00	367.00	167.00	69.00	648.00	7,374.45	11,939.70
16	7,174.88	12,044.48	45.00	367.00	167.00	69.00	648.00	7,822.88	12,692.48
17	7,623.31	12,797.26	45.00	367.00	167.00	69.00	648.00	8,271.31	13,445.26
18	8,071.74	13,550.04	45.00	367.00	167.00	69.00	648.00	8,719.74	14,198.04
19	8,520.17	14,302.82	45.00	367.00	167.00	69.00	648.00	9,168.17	14,950.82
20	8,968.60	15,055.60	45.00	367.00	167.00	69.00	648.00	9,616.60	15,703.60
21	9,417.03	15,808.38	45.00	367.00	167.00	69.00	648.00	10,065.03	16,456.38
22	9,865.46	16,561.16	45.00	367.00	167.00	69.00	648.00	10,513.46	17,209.16
23	10,313.89	17,313.94	45.00	367.00	167.00	69.00	648.00	10,961.89	17,961.94
24	10,762.32	18,066.72	45.00	367.00	167.00	69.00	648.00	11,410.32	18,714.72

Health Service Fee is optional for 1-5 credits.

**A one time non-refundable \$165 Matriculation Fee and a \$40 Transcript For Life Fee is assessed on all new and transfer students**

\*International Students are required to be covered under a Major Medical Insurance Plan.

Qualified tuition and fees do not include the Student Health Service Fee for Tax Relief Act reporting.

*International Student*				
Medical Insurance Cost				
	Fall	Winter	Spring	Summer
Age 24 & under	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 25-30	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 31-40	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 41+	To Be Determined	To Be Determined	To Be Determined	To Be Determined

**2019 - 2020 Graduate Tuition and Fees - Klamath Falls Campus (Summer)**

Credit Hours	Tuition		Fees					Total Tuition & Fees Resident	Total Tuition & Fees Non-Resident
	\$448.43/cr Resident	\$752.78/CR Non-Res	Building	Incidental	Health Service Fee	Student Rec Center Fee	Total Fees		
1	448.43	448.43	34.00	70.00	0.00	69.00	173.00	448.43	621.43
2	896.86	896.86	34.00	70.00	0.00	69.00	173.00	1,069.86	1,069.86
3	1,345.29	1,345.29	34.00	70.00	60.00	69.00	233.00	1,578.29	1,578.29
4	1,793.72	1,793.72	34.00	70.00	60.00	69.00	233.00	2,026.72	2,026.72
5	2,242.15	2,242.15	34.00	70.00	60.00	69.00	233.00	2,475.15	2,475.15
6	2,690.58	2,690.58	34.00	70.00	60.00	69.00	233.00	2,923.58	2,923.58
7	3,139.01	5,269.46	34.00	70.00	60.00	69.00	233.00	3,372.01	5,502.46
8	3,587.44	6,022.24	34.00	70.00	60.00	69.00	233.00	3,820.44	6,255.24
9	4,035.87	6,775.02	34.00	70.00	60.00	69.00	233.00	4,268.87	7,008.02
10	4,484.30	7,527.80	34.00	70.00	60.00	69.00	233.00	4,717.30	7,760.80
11	4,932.73	8,280.58	34.00	70.00	60.00	69.00	233.00	5,165.73	8,513.58
12	5,381.16	9,033.36	34.00	70.00	60.00	69.00	233.00	5,614.16	9,266.36
13	5,829.59	9,786.14	34.00	70.00	60.00	69.00	233.00	6,062.59	10,019.14
14	6,278.02	10,538.92	34.00	70.00	60.00	69.00	233.00	6,511.02	10,771.92
15	6,726.45	11,291.70	34.00	70.00	60.00	69.00	233.00	6,959.45	11,524.70
16	7,174.88	12,044.48	34.00	70.00	60.00	69.00	233.00	7,407.88	12,277.48
17	7,623.31	12,797.26	34.00	70.00	60.00	69.00	233.00	7,856.31	13,030.26
18	8,071.74	13,550.04	34.00	70.00	60.00	69.00	233.00	8,304.74	13,783.04
19	8,520.17	14,302.82	34.00	70.00	60.00	69.00	233.00	8,753.17	14,535.82
20	8,968.60	15,055.60	34.00	70.00	60.00	69.00	233.00	9,201.60	15,288.60
21	9,417.03	15,808.38	34.00	70.00	60.00	69.00	233.00	9,650.03	16,041.38
22	9,865.46	16,561.16	34.00	70.00	60.00	69.00	233.00	10,098.46	16,794.16
23	10,313.89	17,313.94	34.00	70.00	60.00	69.00	233.00	10,546.89	17,546.94
24	10,762.32	18,066.72	34.00	70.00	60.00	69.00	233.00	10,995.32	18,299.72

Summer Health Service Fee is optional for 1-2 credits.

**A one time non-refundable \$165 Matriculation Fee and a \$40 Transcript For Life Fee is assessed on all new and transfer students**

\*International Students are required to be covered under a Major Medical Insurance Plan.

Qualified tuition and fees do not include the Student Health Service Fee for Tax Relief Act reporting.

*International Student*				
Medical Insurance Cost				
	Fall	Winter	Spring	Summer
Age 24 & under	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 25-30	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 31-40	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 41+	To Be Determined	To Be Determined	To Be Determined	To Be Determined



**2019 - 2020 Graduate Tuition and Fees - Klamath Falls Campus (Engineering & Technology Majors)**

Credit Hours	Tuition		Fees					Total Tuition & Fees Resident	Total Tuition & Fees Non-Resident
	\$582.96/cr Resident	\$978.61/cr Non-Res	Building	Incidental	Health Service Fee	Student Rec Center Fee	Total Fees		
1	582.96	582.96	23.00	192.00	0.00	69.00	284.00	866.96	866.96
2	1,165.92	1,165.92	25.00	227.00	0.00	69.00	321.00	1,486.92	1,486.92
3	1,748.88	1,748.88	27.00	262.00	0.00	69.00	358.00	2,106.88	2,106.88
4	2,331.84	2,331.84	29.00	297.00	0.00	69.00	395.00	2,726.84	2,726.84
5	2,914.80	2,914.80	31.00	332.00	0.00	69.00	432.00	3,346.80	3,346.80
6	3,497.76	3,497.76	33.00	367.00	167.00	69.00	636.00	4,133.76	4,133.76
7	4,080.72	6,850.27	35.00	367.00	167.00	69.00	638.00	4,718.72	7,488.27
8	4,663.68	7,828.88	37.00	367.00	167.00	69.00	640.00	5,303.68	8,468.88
9	5,246.64	8,807.49	39.00	367.00	167.00	69.00	642.00	5,888.64	9,449.49
10	5,829.60	9,786.10	41.00	367.00	167.00	69.00	644.00	6,473.60	10,430.10
11	6,412.56	10,764.71	43.00	367.00	167.00	69.00	646.00	7,058.56	11,410.71
12	6,995.52	11,743.32	45.00	367.00	167.00	69.00	648.00	7,643.52	12,391.32
13	7,578.48	12,721.93	45.00	367.00	167.00	69.00	648.00	8,226.48	13,369.93
14	8,161.44	13,700.54	45.00	367.00	167.00	69.00	648.00	8,809.44	14,348.54
15	8,744.40	14,679.15	45.00	367.00	167.00	69.00	648.00	9,392.40	15,327.15
16	9,327.36	15,657.76	45.00	367.00	167.00	69.00	648.00	9,975.36	16,305.76
17	9,910.32	16,636.37	45.00	367.00	167.00	69.00	648.00	10,558.32	17,284.37
18	10,493.28	17,614.98	45.00	367.00	167.00	69.00	648.00	11,141.28	18,262.98
19	11,076.24	18,593.59	45.00	367.00	167.00	69.00	648.00	11,724.24	19,241.59
20	11,659.20	19,572.20	45.00	367.00	167.00	69.00	648.00	12,307.20	20,220.20
21	12,242.16	20,550.81	45.00	367.00	167.00	69.00	648.00	12,890.16	21,198.81
22	12,825.12	21,529.42	45.00	367.00	167.00	69.00	648.00	13,473.12	22,177.42
23	13,408.08	22,508.03	45.00	367.00	167.00	69.00	648.00	14,056.08	23,156.03
24	13,991.04	23,486.64	45.00	367.00	167.00	69.00	648.00	14,639.04	24,134.64

Health Service Fee is optional for 1-5 credits.

**A one time non-refundable \$165 Matriculation Fee and a \$40 Transcript For Life Fee is assessed on all new and transfer students**

\*International Students are required to be covered under a Major Medical Insurance Plan.

Qualified tuition and fees do not include the Student Health Service Fee for Tax Relief Act reporting.

	*International Student*			
	Medical Insurance Cost			
	Fall	Winter	Spring	Summer
Age 24 & under	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 25-30	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 31-40	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 41+	To Be Determined	To Be Determined	To Be Determined	To Be Determined

**2019 - 2020 Graduate Tuition and Fees - Klamath Falls Campus (Engineering & Technology Majors) Summer**

Credit Hours	Tuition		Fees					Total Tuition & Fees Resident	Total Tuition & Fees Non-Resident
	\$582.96/cr Resident	\$978.61/cr Non-Res	Building	Incidental	Health Service Fee	Student Rec Center Fee	Total Fees		
1	582.96	582.96	34.00	70.00	0.00	69.00	173.00	755.96	755.96
2	1,165.92	1,165.92	34.00	70.00	0.00	69.00	173.00	1,338.92	1,338.92
3	1,748.88	1,748.88	34.00	70.00	60.00	69.00	233.00	1,981.88	1,981.88
4	2,331.84	2,331.84	34.00	70.00	60.00	69.00	233.00	2,564.84	2,564.84
5	2,914.80	2,914.80	34.00	70.00	60.00	69.00	233.00	3,147.80	3,147.80
6	3,497.76	3,497.76	34.00	70.00	60.00	69.00	233.00	3,730.76	3,730.76
7	4,080.72	6,850.27	34.00	70.00	60.00	69.00	233.00	4,313.72	7,083.27
8	4,663.68	7,828.88	34.00	70.00	60.00	69.00	233.00	4,896.68	8,061.88
9	5,246.64	8,807.49	34.00	70.00	60.00	69.00	233.00	5,479.64	9,040.49
10	5,829.60	9,786.10	34.00	70.00	60.00	69.00	233.00	6,062.60	10,019.10
11	6,412.56	10,764.71	34.00	70.00	60.00	69.00	233.00	6,645.56	10,997.71
12	6,995.52	11,743.32	34.00	70.00	60.00	69.00	233.00	7,228.52	11,976.32
13	7,578.48	12,721.93	34.00	70.00	60.00	69.00	233.00	7,811.48	12,954.93
14	8,161.44	13,700.54	34.00	70.00	60.00	69.00	233.00	8,394.44	13,933.54
15	8,744.40	14,679.15	34.00	70.00	60.00	69.00	233.00	8,977.40	14,912.15
16	9,327.36	15,657.76	34.00	70.00	60.00	69.00	233.00	9,560.36	15,890.76
17	9,910.32	16,636.37	34.00	70.00	60.00	69.00	233.00	10,143.32	16,869.37
18	10,493.28	17,614.98	34.00	70.00	60.00	69.00	233.00	10,726.28	17,847.98
19	11,076.24	18,593.59	34.00	70.00	60.00	69.00	233.00	11,309.24	18,826.59
20	11,659.20	19,572.20	34.00	70.00	60.00	69.00	233.00	11,892.20	19,805.20
21	12,242.16	20,550.81	34.00	70.00	60.00	69.00	233.00	12,475.16	20,783.81
22	12,825.12	21,529.42	34.00	70.00	60.00	69.00	233.00	13,058.12	21,762.42
23	13,408.08	22,508.03	34.00	70.00	60.00	69.00	233.00	13,641.08	22,741.03
24	13,991.04	23,486.64	34.00	70.00	60.00	69.00	233.00	14,224.04	23,719.64

Summer Health Service Fee is optional for 1-2 credits.

**A one time non-refundable \$165 Matriculation Fee and a \$40 Transcript For Life Fee is assessed on all new and transfer students**

\*International Students are required to be covered under a Major Medical Insurance Plan.

Qualified tuition and fees do not include the Student Health Service Fee for Tax Relief Act reporting.

*International Student*				
Medical Insurance Cost				
	Fall	Winter	Spring	Summer
Age 24 & under	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 25-30	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 31-40	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 41+	To Be Determined	To Be Determined	To Be Determined	To Be Determined



**2019 - 2020 Graduate Tuition and Fees - Portland-Metro Campus**

Credit Hours	Tuition		Fees				Total Tuition & Fees Resident	Total Tuition & Fees Non-Resident
	\$448.43/cr Resident	\$752.78/CR Non-Res	Building	Incidental	Health Service Fee	Total Fees		
1	448.43	448.43	23.00	50.00	40.00	113.00	561.43	561.43
2	896.86	896.86	25.00	50.00	40.00	115.00	1,011.86	1,011.86
3	1,345.29	1,345.29	27.00	50.00	40.00	117.00	1,462.29	1,462.29
4	1,793.72	1,793.72	29.00	50.00	40.00	119.00	1,912.72	1,912.72
5	2,242.15	2,242.15	31.00	50.00	40.00	121.00	2,363.15	2,363.15
6	2,690.58	2,690.58	33.00	50.00	40.00	123.00	2,813.58	2,813.58
7	3,139.01	5,269.46	35.00	50.00	40.00	125.00	3,264.01	5,394.46
8	3,587.44	6,022.24	37.00	50.00	40.00	127.00	3,714.44	6,149.24
9	4,035.87	6,775.02	39.00	50.00	40.00	129.00	4,164.87	6,904.02
10	4,484.30	7,527.80	41.00	50.00	40.00	131.00	4,615.30	7,658.80
11	4,932.73	8,280.58	43.00	50.00	40.00	133.00	5,065.73	8,413.58
12	5,381.16	9,033.36	45.00	50.00	40.00	135.00	5,516.16	9,168.36
13	5,829.59	9,786.14	45.00	50.00	40.00	135.00	5,964.59	9,921.14
14	6,278.02	10,538.92	45.00	50.00	40.00	135.00	6,413.02	10,673.92
15	6,726.45	11,291.70	45.00	50.00	40.00	135.00	6,861.45	11,426.70
16	7,174.88	12,044.48	45.00	50.00	40.00	135.00	7,309.88	12,179.48
17	7,623.31	12,797.26	45.00	50.00	40.00	135.00	7,758.31	12,932.26
18	8,071.74	13,550.04	45.00	50.00	40.00	135.00	8,206.74	13,685.04
19	8,520.17	14,302.82	45.00	50.00	40.00	135.00	8,655.17	14,437.82
20	8,968.60	15,055.60	45.00	50.00	40.00	135.00	9,103.60	15,190.60
21	9,417.03	15,808.38	45.00	50.00	40.00	135.00	9,552.03	15,943.38
22	9,865.46	16,561.16	45.00	50.00	40.00	135.00	10,000.46	16,696.16
23	10,313.89	17,313.94	45.00	50.00	40.00	135.00	10,448.89	17,448.94
24	10,762.32	18,066.72	45.00	50.00	40.00	135.00	10,897.32	18,201.72

**A one time non-refundable \$165 Matriculation Fee and a \$40 Transcript For Life Fee is assessed on all new and transfer students.**

\*International Students are required to be covered under a Major Medical Insurance Plan.

Qualified tuition and fees do not include the Student Health Service Fee for Tax Relief Act reporting.

*International Student*				
Medical Insurance Cost				
	Fall	Winter	Spring	Summer
Age 24 & under	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 25-30	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 31-40	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 41+	To Be Determined	To Be Determined	To Be Determined	To Be Determined

**2019 - 2020 Graduate Tuition and Fees - Portland-Metro Campus (Summer)**

Credit Hours	Tuition		Fees				Total Tuition & Fees Resident	Total Tuition & Fees Non-Resident
	\$448.43/cr Resident	\$752.78/CR Non-Res	Building	Incidental	Health Service Fee	Total Fees		
1	448.43	448.43	34.00	50.00	40.00	124.00	572.43	572.43
2	896.86	896.86	34.00	50.00	40.00	124.00	1,020.86	1,020.86
3	1,345.29	1,345.29	34.00	50.00	40.00	124.00	1,469.29	1,469.29
4	1,793.72	1,793.72	34.00	50.00	40.00	124.00	1,917.72	1,917.72
5	2,242.15	2,242.15	34.00	50.00	40.00	124.00	2,366.15	2,366.15
6	2,690.58	2,690.58	34.00	50.00	40.00	124.00	2,814.58	2,814.58
7	3,139.01	3,139.01	34.00	50.00	40.00	124.00	3,263.01	3,263.01
8	3,587.44	3,587.44	34.00	50.00	40.00	124.00	3,711.44	3,711.44
9	4,035.87	4,035.87	34.00	50.00	40.00	124.00	4,159.87	4,159.87
10	4,484.30	4,484.30	34.00	50.00	40.00	124.00	4,608.30	4,608.30
11	4,932.73	4,932.73	34.00	50.00	40.00	124.00	5,056.73	5,056.73
12	5,381.16	5,381.16	34.00	50.00	40.00	124.00	5,505.16	5,505.16
13	5,829.59	5,829.59	34.00	50.00	40.00	124.00	5,953.59	5,953.59
14	6,278.02	6,278.02	34.00	50.00	40.00	124.00	6,402.02	6,402.02
15	6,726.45	6,726.45	34.00	50.00	40.00	124.00	6,850.45	6,850.45
16	7,174.88	7,174.88	34.00	50.00	40.00	124.00	7,298.88	7,298.88
17	7,623.31	7,623.31	34.00	50.00	40.00	124.00	7,747.31	7,747.31
18	8,071.74	8,071.74	34.00	50.00	40.00	124.00	8,195.74	8,195.74
19	8,520.17	8,520.17	34.00	50.00	40.00	124.00	8,644.17	8,644.17
20	8,968.60	8,968.60	34.00	50.00	40.00	124.00	9,092.60	9,092.60
21	9,417.03	9,417.03	34.00	50.00	40.00	124.00	9,541.03	9,541.03
22	9,865.46	9,865.46	34.00	50.00	40.00	124.00	9,989.46	9,989.46
23	10,313.89	10,313.89	34.00	50.00	40.00	124.00	10,437.89	10,437.89
24	10,762.32	10,762.32	34.00	50.00	40.00	124.00	10,886.32	10,886.32

**A one time non-refundable \$165 Matriculation Fee and a \$40 Transcript For Life Fee is assessed on all new and transfer students.**

\*International Students are required to be covered under a Major Medical Insurance Plan.

Qualified tuition and fees do not include the Student Health Service Fee for Tax Relief Act reporting.

	*International Student*			
	Medical Insurance Cost			
	Fall	Winter	Spring	Summer
Age 24 & under	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 25-30	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 31-40	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 41+	To Be Determined	To Be Determined	To Be Determined	To Be Determined



**2019 - 2020 Graduate Tuition and Fees - Portland-Metro Campus (Engineering & Technology Majors)**

Credit Hours	Tuition		Fees				Total Tuition & Fees Resident	Total Tuition & Fees Non-Resident
	\$582.96/cr Resident	\$978.61/cr Non-Res	Building	Incidental	Health Service Fee	Total Fees		
1	582.96	582.96	23.00	50.00	40.00	113.00	695.96	695.96
2	1,165.92	1,165.92	25.00	50.00	40.00	115.00	1,280.92	1,280.92
3	1,748.88	1,748.88	27.00	50.00	40.00	117.00	1,865.88	1,865.88
4	2,331.84	2,331.84	29.00	50.00	40.00	119.00	2,450.84	2,450.84
5	2,914.80	2,914.80	31.00	50.00	40.00	121.00	3,035.80	3,035.80
6	3,497.76	3,497.76	33.00	50.00	40.00	123.00	3,620.76	3,620.76
7	4,080.72	6,850.27	35.00	50.00	40.00	125.00	4,205.72	6,975.27
8	4,663.68	7,828.88	37.00	50.00	40.00	127.00	4,790.68	7,955.88
9	5,246.64	8,807.49	39.00	50.00	40.00	129.00	5,375.64	8,936.49
10	5,829.60	9,786.10	41.00	50.00	40.00	131.00	5,960.60	9,917.10
11	6,412.56	10,764.71	43.00	50.00	40.00	133.00	6,545.56	10,897.71
12	6,995.52	11,743.32	45.00	50.00	40.00	135.00	7,130.52	11,878.32
13	7,578.48	12,721.93	45.00	50.00	40.00	135.00	7,713.48	12,856.93
14	8,161.44	13,700.54	45.00	50.00	40.00	135.00	8,296.44	13,835.54
15	8,744.40	14,679.15	45.00	50.00	40.00	135.00	8,879.40	14,814.15
16	9,327.36	15,657.76	45.00	50.00	40.00	135.00	9,462.36	15,792.76
17	9,910.32	16,636.37	45.00	50.00	40.00	135.00	10,045.32	16,771.37
18	10,493.28	17,614.98	45.00	50.00	40.00	135.00	10,628.28	17,749.98
19	11,076.24	18,593.59	45.00	50.00	40.00	135.00	11,211.24	18,728.59
20	11,659.20	19,572.20	45.00	50.00	40.00	135.00	11,794.20	19,707.20
21	12,242.16	20,550.81	45.00	50.00	40.00	135.00	12,377.16	20,685.81
22	12,825.12	21,529.42	45.00	50.00	40.00	135.00	12,960.12	21,664.42
23	13,408.08	22,508.03	45.00	50.00	40.00	135.00	13,543.08	22,643.03
24	13,991.04	23,486.64	45.00	50.00	40.00	135.00	14,126.04	23,621.64

**A one time non-refundable \$165 Matriculation Fee and a \$40 Transcript For Life Fee is assessed on all new and transfer students.**

\*International Students are required to be covered under a Major Medical Insurance Plan.

Qualified tuition and fees do not include the Student Health Service Fee for Tax Relief Act reporting.

*International Student*				
Medical Insurance Cost				
	Fall	Winter	Spring	Summer
Age 24 & under	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 25-30	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 31-40	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 41+	To Be Determined	To Be Determined	To Be Determined	To Be Determined

**2019 - 2020 Graduate Tuition and Fees - Portland-Metro Campus (Engineering & Technology Majors) Summer**

Credit Hours	Tuition		Fees				Total Tuition & Fees Resident	Total Tuition & Fees Non-Resident
	\$582.96/cr Resident	\$978.61/cr Non-Res	Building	Incidental	Health Service Fee	Total Fees		
1	582.96	582.96	34.00	50.00	40.00	124.00	706.96	706.96
2	1,165.92	1,165.92	34.00	50.00	40.00	124.00	1,289.92	1,289.92
3	1,748.88	1,748.88	34.00	50.00	40.00	124.00	1,872.88	1,872.88
4	2,331.84	2,331.84	34.00	50.00	40.00	124.00	2,455.84	2,455.84
5	2,914.80	2,914.80	34.00	50.00	40.00	124.00	3,038.80	3,038.80
6	3,497.76	3,497.76	34.00	50.00	40.00	124.00	3,621.76	3,621.76
7	4,080.72	6,850.27	34.00	50.00	40.00	124.00	4,204.72	6,974.27
8	4,663.68	7,828.88	34.00	50.00	40.00	124.00	4,787.68	7,952.88
9	5,246.64	8,807.49	34.00	50.00	40.00	124.00	5,370.64	8,931.49
10	5,829.60	9,786.10	34.00	50.00	40.00	124.00	5,953.60	9,910.10
11	6,412.56	10,764.71	34.00	50.00	40.00	124.00	6,536.56	10,888.71
12	6,995.52	11,743.32	34.00	50.00	40.00	124.00	7,119.52	11,867.32
13	7,578.48	12,721.93	34.00	50.00	40.00	124.00	7,702.48	12,845.93
14	8,161.44	13,700.54	34.00	50.00	40.00	124.00	8,285.44	13,824.54
15	8,744.40	14,679.15	34.00	50.00	40.00	124.00	8,868.40	14,803.15
16	9,327.36	15,657.76	34.00	50.00	40.00	124.00	9,451.36	15,781.76
17	9,910.32	16,636.37	34.00	50.00	40.00	124.00	10,034.32	16,760.37
18	10,493.28	17,614.98	34.00	50.00	40.00	124.00	10,617.28	17,738.98
19	11,076.24	18,593.59	34.00	50.00	40.00	124.00	11,200.24	18,717.59
20	11,659.20	19,572.20	34.00	50.00	40.00	124.00	11,783.20	19,696.20
21	12,242.16	20,550.81	34.00	50.00	40.00	124.00	12,366.16	20,674.81
22	12,825.12	21,529.42	34.00	50.00	40.00	124.00	12,949.12	21,653.42
23	13,408.08	22,508.03	34.00	50.00	40.00	124.00	13,532.08	22,632.03
24	13,991.04	23,486.64	34.00	50.00	40.00	124.00	14,115.04	23,610.64

**A one time non-refundable \$165 Matriculation Fee and a \$40 Transcript For Life Fee is assessed on all new and transfer students.**

\*International Students are required to be covered under a Major Medical Insurance Plan.

Qualified tuition and fees do not include the Student Health Service Fee for Tax Relief Act reporting.

	*International Student*			
	Medical Insurance Cost			
	Fall	Winter	Spring	Summer
	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 24 & under	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 25-30	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 31-40	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 41+	To Be Determined	To Be Determined	To Be Determined	To Be Determined



**2019 - 2020 Medical Laboratory Science Program - Portland-Metro Campus**

Credit Hours	Tuition		Fees				Total Tuition & Fees Resident	Total Tuition & Fees Non-Resident
	\$269.66/cr Resident	\$487.58/cr Non-Res	Building	Incidental	Health Service Fee	Total Fees		
1	269.66	269.66	23.00	50.00	40.00	113.00	382.66	382.66
2	539.32	539.32	25.00	50.00	40.00	115.00	654.32	654.32
3	808.98	808.98	27.00	50.00	40.00	117.00	925.98	925.98
4	1,078.64	1,078.64	29.00	50.00	40.00	119.00	1,197.64	1,197.64
5	1,348.30	1,348.30	31.00	50.00	40.00	121.00	1,469.30	1,469.30
6	1,617.96	1,617.96	33.00	50.00	40.00	123.00	1,740.96	1,740.96
7	1,887.62	3,413.06	35.00	50.00	40.00	125.00	2,012.62	3,538.06
8	2,157.28	3,900.64	37.00	50.00	40.00	127.00	2,284.28	4,027.64
9	2,426.94	4,388.22	39.00	50.00	40.00	129.00	2,555.94	4,517.22
10	2,696.60	4,875.80	41.00	50.00	40.00	131.00	2,827.60	5,006.80
11	2,966.26	5,363.38	43.00	50.00	40.00	133.00	3,099.26	5,496.38
12	3,235.92	5,850.96	45.00	50.00	40.00	135.00	3,370.92	5,985.96
13	3,505.58	6,338.54	45.00	50.00	40.00	135.00	3,640.58	6,473.54
14	3,775.24	6,826.12	45.00	50.00	40.00	135.00	3,910.24	6,961.12
15	4,044.90	7,313.70	45.00	50.00	40.00	135.00	4,179.90	7,448.70
16	4,314.56	7,801.28	45.00	50.00	40.00	135.00	4,449.56	7,936.28
17	4,584.22	8,288.86	45.00	50.00	40.00	135.00	4,719.22	8,423.86
18	4,853.88	8,776.44	45.00	50.00	40.00	135.00	4,988.88	8,911.44
19	5,123.54	9,264.02	45.00	50.00	40.00	135.00	5,258.54	9,399.02
20	5,393.20	9,751.60	45.00	50.00	40.00	135.00	5,528.20	9,886.60
21	5,662.86	10,239.18	45.00	50.00	40.00	135.00	5,797.86	10,374.18
22	5,932.52	10,726.76	45.00	50.00	40.00	135.00	6,067.52	10,861.76
23	6,202.18	11,214.34	45.00	50.00	40.00	135.00	6,337.18	11,349.34
24	6,471.84	11,701.92	45.00	50.00	40.00	135.00	6,606.84	11,836.92

**Medical Laboratory Science Program Students on externship are not charged the Incidental and Health Service Fees.**

**A one time non-refundable \$315 Matriculation Fee and a \$40 Transcript For Life Fee is assessed on all new and transfer students.**

\*International Students are required to be covered under a Major Medical Insurance Plan.

Qualified tuition and fees do not include the Student Health Service Fee for Tax Relief Act reporting.

*International Student*				
Medical Insurance Cost				
	Fall	Winter	Spring	Summer
Age 24 & under	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 25-30	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 31-40	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 41+	To Be Determined	To Be Determined	To Be Determined	To Be Determined

**2019 - 2020 Medical Laboratory Science Program - Portland-Metro Campus (Summer)**

Credit Hours	Tuition		Fees				Total Tuition & Fees Resident	Total Tuition & Fees Non-Resident
	\$269.66/cr Resident	\$487.58/cr Non-Res	Building	Incidental	Health Service Fee	Total Fees		
1	269.66	269.66	34.00	50.00	40.00	124.00	393.66	393.66
2	539.32	539.32	34.00	50.00	40.00	124.00	663.32	663.32
3	808.98	808.98	34.00	50.00	40.00	124.00	932.98	932.98
4	1,078.64	1,078.64	34.00	50.00	40.00	124.00	1,202.64	1,202.64
5	1,348.30	1,348.30	34.00	50.00	40.00	124.00	1,472.30	1,472.30
6	1,617.96	1,617.96	34.00	50.00	40.00	124.00	1,741.96	1,741.96
7	1,887.62	3,413.06	34.00	50.00	40.00	124.00	2,011.62	3,537.06
8	2,157.28	3,900.64	34.00	50.00	40.00	124.00	2,281.28	4,024.64
9	2,426.94	4,388.22	34.00	50.00	40.00	124.00	2,550.94	4,512.22
10	2,696.60	4,875.80	34.00	50.00	40.00	124.00	2,820.60	4,999.80
11	2,966.26	5,363.38	34.00	50.00	40.00	124.00	3,090.26	5,487.38
12	3,235.92	5,850.96	34.00	50.00	40.00	124.00	3,359.92	5,974.96
13	3,505.58	6,338.54	34.00	50.00	40.00	124.00	3,629.58	6,462.54
14	3,775.24	6,826.12	34.00	50.00	40.00	124.00	3,899.24	6,950.12
15	4,044.90	7,313.70	34.00	50.00	40.00	124.00	4,168.90	7,437.70
16	4,314.56	7,801.28	34.00	50.00	40.00	124.00	4,438.56	7,925.28
17	4,584.22	8,288.86	34.00	50.00	40.00	124.00	4,708.22	8,412.86
18	4,853.88	8,776.44	34.00	50.00	40.00	124.00	4,977.88	8,900.44
19	5,123.54	9,264.02	34.00	50.00	40.00	124.00	5,247.54	9,388.02
20	5,393.20	9,751.60	34.00	50.00	40.00	124.00	5,517.20	9,875.60
21	5,662.86	10,239.18	34.00	50.00	40.00	124.00	5,786.86	10,363.18
22	5,932.52	10,726.76	34.00	50.00	40.00	124.00	6,056.52	10,850.76
23	6,202.18	11,214.34	34.00	50.00	40.00	124.00	6,326.18	11,338.34
24	6,471.84	11,701.92	34.00	50.00	40.00	124.00	6,595.84	11,825.92

**Medical Laboratory Science Program Students on externship are not charged the Incidental and Health Service Fees.**

**A one time non-refundable \$315 Matriculation Fee and a \$40 Transcript For Life Fee is assessed on all new and transfer students.**

\*International Students are required to be covered under a Major Medical Insurance Plan.

Qualified tuition and fees do not include the Student Health Service Fee for Tax Relief Act reporting.

	*International Student*			
	Medical Insurance Cost			
	Fall	Winter	Spring	Summer
Age 24 & under	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 25-30	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 31-40	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 41+	To Be Determined	To Be Determined	To Be Determined	To Be Determined



**2019 - 2020 Paramedic Program - Portland-Metro Campus**

Credit Hours	Tuition		Fees				Total Tuition & Fees Resident	Total Tuition & Fees Non-Resident
	\$213.24/Cr Resident	\$305.78/Cr Non-Res	Building	Incidental	Health Service Fee	Total Fees		
1	213.24	213.24	23.00	50.00	40.00	113.00	326.24	326.24
2	426.48	426.48	25.00	50.00	40.00	115.00	541.48	541.48
3	639.72	639.72	27.00	50.00	40.00	117.00	756.72	756.72
4	852.96	852.96	29.00	50.00	40.00	119.00	971.96	971.96
5	1,066.20	1,066.20	31.00	50.00	40.00	121.00	1,187.20	1,187.20
6	1,279.44	1,279.44	33.00	50.00	40.00	123.00	1,402.44	1,402.44
7	1,492.68	2,140.46	35.00	50.00	40.00	125.00	1,617.68	2,265.46
8	1,705.92	2,446.24	37.00	50.00	40.00	127.00	1,832.92	2,573.24
9	1,919.16	2,752.02	39.00	50.00	40.00	129.00	2,048.16	2,881.02
10	2,132.40	3,057.80	41.00	50.00	40.00	131.00	2,263.40	3,188.80
11	2,345.64	3,363.58	43.00	50.00	40.00	133.00	2,478.64	3,496.58
12	2,558.88	3,669.36	45.00	50.00	40.00	135.00	2,693.88	3,804.36
13	2,772.12	3,975.14	45.00	50.00	40.00	135.00	2,907.12	4,110.14
14	2,985.36	4,280.92	45.00	50.00	40.00	135.00	3,120.36	4,415.92
15	3,198.60	4,586.70	45.00	50.00	40.00	135.00	3,333.60	4,721.70
16	3,411.84	4,892.48	45.00	50.00	40.00	135.00	3,546.84	5,027.48
17	3,625.08	5,198.26	45.00	50.00	40.00	135.00	3,760.08	5,333.26
18	3,838.32	5,504.04	45.00	50.00	40.00	135.00	3,973.32	5,639.04
19	4,051.56	5,809.82	45.00	50.00	40.00	135.00	4,186.56	5,944.82
20	4,264.80	6,115.60	45.00	50.00	40.00	135.00	4,399.80	6,250.60
21	4,478.04	6,421.38	45.00	50.00	40.00	135.00	4,613.04	6,556.38
22	4,691.28	6,727.16	45.00	50.00	40.00	135.00	4,826.28	6,862.16
23	4,904.52	7,032.94	45.00	50.00	40.00	135.00	5,039.52	7,167.94
24	5,117.76	7,338.72	45.00	50.00	40.00	135.00	5,252.76	7,473.72

Paramedic Program Students on externship are not charged the Incidental and Health Service Fees.

A one time non-refundable \$315 Matriculation Fee and a \$40 Transcript For Life Fee is assessed on all new and transfer students.

\*International Students are required to be covered under a Major Medical Insurance Plan.

Qualified tuition and fees do not include the Student Health Service Fee for Tax Relief Act reporting.

	*International Student*			
	Medical Insurance Cost			
	Fall	Winter	Spring	Summer
Age 24 & under	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 25-30	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 31-40	To Be Determined	To Be Determined	To Be Determined	To Be Determined
Age 41+	To Be Determined	To Be Determined	To Be Determined	To Be Determined

**2019 - 2020 Paramedic Program (Externship - Summer)**

Credit Hours	Tuition		Fees		Total Tuition & Fees Resident	Total Tuition & Fees Non-Resident
	\$213.24/Cr Resident	\$305.78/Cr Non-Res	Building	Total Fees		
1	213.24	213.24	34.00	34.00	247.24	247.24
2	426.48	426.48	34.00	34.00	460.48	460.48
3	639.72	639.72	34.00	34.00	673.72	673.72
4	852.96	852.96	34.00	34.00	886.96	886.96
5	1,066.20	1,066.20	34.00	34.00	1,100.20	1,100.20
6	1,279.44	1,279.44	34.00	34.00	1,313.44	1,313.44
7	1,492.68	2,140.46	34.00	34.00	1,526.68	2,174.46
8	1,705.92	2,446.24	34.00	34.00	1,739.92	2,480.24
9	1,919.16	2,752.02	34.00	34.00	1,953.16	2,786.02
10	2,132.40	3,057.80	34.00	34.00	2,166.40	3,091.80
11	2,345.64	3,363.58	34.00	34.00	2,379.64	3,397.58
12	2,558.88	3,669.36	34.00	34.00	2,592.88	3,703.36
13	2,772.12	3,975.14	34.00	34.00	2,806.12	4,009.14
14	2,985.36	4,280.92	34.00	34.00	3,019.36	4,314.92
15	3,198.60	4,586.70	34.00	34.00	3,232.60	4,620.70
16	3,411.84	4,892.48	34.00	34.00	3,445.84	4,926.48
17	3,625.08	5,198.26	34.00	34.00	3,659.08	5,232.26
18	3,838.32	5,504.04	34.00	34.00	3,872.32	5,538.04
19	4,051.56	5,809.82	34.00	34.00	4,085.56	5,843.82
20	4,264.80	6,115.60	34.00	34.00	4,298.80	6,149.60
21	4,478.04	6,421.38	34.00	34.00	4,512.04	6,455.38
22	4,691.28	6,727.16	34.00	34.00	4,725.28	6,761.16
23	4,904.52	7,032.94	34.00	34.00	4,938.52	7,066.94
24	5,117.76	7,338.72	34.00	34.00	5,151.76	7,372.72

**A one time non-refundable \$315 Matriculation Fee and a \$40 Transcript For Life Fee is assessed on all new and transfer students.**

\*International Students are required to be covered under a Major Medical Insurance Plan.

Qualified tuition and fees do not include the Student Health Service Fee for Tax Relief Act reporting.

Age 24 & under

Age 25-30

Age 31-40

Age 41+

*International Student*			
Medical Insurance Cost			
Fall	Winter	Spring	Summer
To Be Determined	To Be Determined	To Be Determined	To Be Determined
To Be Determined	To Be Determined	To Be Determined	To Be Determined
To Be Determined	To Be Determined	To Be Determined	To Be Determined
To Be Determined	To Be Determined	To Be Determined	To Be Determined

**2019 - 2020 Dental Hygiene Program - Chemeketa Community College**

Credit Hours	Tuition		Total Resident	Total Non-Res
	\$213.24/Cr Resident	\$692.50/Cr Non-Res		
1	213.24	213.24	213.24	213.24
2	426.48	426.48	426.48	426.48
3	639.72	639.72	639.72	639.72
4	852.96	852.96	852.96	852.96
5	1,066.20	1,066.20	1,066.20	1,066.20
6	1,279.44	1,279.44	1,279.44	1,279.44
7	1,492.68	4,847.50	1,492.68	4,847.50
8	1,705.92	5,540.00	1,705.92	5,540.00
9	1,919.16	6,232.50	1,919.16	6,232.50
10	2,132.40	6,925.00	2,132.40	6,925.00
11	2,345.64	7,617.50	2,345.64	7,617.50
12	2,558.88	8,310.00	2,558.88	8,310.00
13	2,772.12	9,002.50	2,772.12	9,002.50
14	2,985.36	9,695.00	2,985.36	9,695.00
15	3,198.60	10,387.50	3,198.60	10,387.50
16	3,411.84	11,080.00	3,411.84	11,080.00
17	3,625.08	11,772.50	3,625.08	11,772.50
18	3,838.32	12,465.00	3,838.32	12,465.00
19	4,051.56	13,157.50	4,051.56	13,157.50
20	4,264.80	13,850.00	4,264.80	13,850.00
21	4,478.04	14,542.50	4,478.04	14,542.50
22	4,691.28	15,235.00	4,691.28	15,235.00
23	4,904.52	15,927.50	4,904.52	15,927.50
24	5,117.76	16,620.00	5,117.76	16,620.00

**A one time non-refundable \$315 Matriculation Fee and a \$40 Transcript For Life Fee is assessed on all new and transfer students**

\*International Students are required to be covered under a Major Medical Insurance Plan.

Age 24 & under  
Age 25-30  
Age 31-40  
Age 41+

*International Student*			
Medical Insurance Cost			
Fall	Winter	Spring	Summer
To Be Determined	To Be Determined	To Be Determined	To Be Determined
To Be Determined	To Be Determined	To Be Determined	To Be Determined
To Be Determined	To Be Determined	To Be Determined	To Be Determined
To Be Determined	To Be Determined	To Be Determined	To Be Determined



**2019 - 2020 Dental Hygiene Program - Chemeketa Community College (Summer)**

Credit Hours	Tuition		Total Resident	Total Non-Res
	\$213.24/Cr Resident	\$692.50/Cr Non-Res		
1	213.24	213.24	213.24	213.24
2	426.48	426.48	426.48	426.48
3	639.72	639.72	639.72	639.72
4	852.96	852.96	852.96	852.96
5	1,066.20	1,066.20	1,066.20	1,066.20
6	1,279.44	1,279.44	1,279.44	1,279.44
7	1,492.68	4,847.50	1,492.68	4,847.50
8	1,705.92	5,540.00	1,705.92	5,540.00
9	1,919.16	6,232.50	1,919.16	6,232.50
10	2,132.40	6,925.00	2,132.40	6,925.00
11	2,345.64	7,617.50	2,345.64	7,617.50
12	2,558.88	8,310.00	2,558.88	8,310.00
13	2,772.12	9,002.50	2,772.12	9,002.50
14	2,985.36	9,695.00	2,985.36	9,695.00
15	3,198.60	10,387.50	3,198.60	10,387.50
16	3,411.84	11,080.00	3,411.84	11,080.00
17	3,625.08	11,772.50	3,625.08	11,772.50
18	3,838.32	12,465.00	3,838.32	12,465.00
19	4,051.56	13,157.50	4,051.56	13,157.50
20	4,264.80	13,850.00	4,264.80	13,850.00
21	4,478.04	14,542.50	4,478.04	14,542.50
22	4,691.28	15,235.00	4,691.28	15,235.00
23	4,904.52	15,927.50	4,904.52	15,927.50
24	5,117.76	16,620.00	5,117.76	16,620.00

**A one time non-refundable \$315 Matriculation Fee and a \$40 Transcript For Life Fee is assessed on all new and transfer students**

\*International Students are required to be covered under a Major Medical Insurance Plan.

Age 24 & under  
Age 25-30  
Age 31-40  
Age 41+

*International Student*			
Medical Insurance Cost			
Fall	Winter	Spring	Summer
To Be Determined	To Be Determined	To Be Determined	To Be Determined
To Be Determined	To Be Determined	To Be Determined	To Be Determined
To Be Determined	To Be Determined	To Be Determined	To Be Determined
To Be Determined	To Be Determined	To Be Determined	To Be Determined



**2019-2020 ONLINE TUITION AND FEES RATES**

TUITION	RATES
Online Undergraduate Tuition	\$257.00/Credit
Online Graduate Tuition	\$367.00/Credit
Online Master of Science in Allied Health (MSAH) Tuition	\$367.00/Credit
Online Master of Science in Engineering (MSE) Tuition	\$533.00/Credit

FEES	RATES
Online Tech Fee	\$65.00/Online Course

**2019-2020 STAFF & STAFF DEPENDENT FEE PRIVILEGES**

TUITION	RATES
Staff Tuition (on-campus credits only)	\$60.00/Credit (up to 12 credits)
<u>STAFF GRADUATE</u> Online Tuition	A 25% discount is applied on graduate online tuition billed to Oregon Tech staff members.
Staff Dependent Tuition (on-campus credits only)	\$60.00/Credit (up to 12 credits)

FEES	RATES
Staff Fees	Staff do not pay Building, Incidental, and Health Service Fees but they do pay extra class fees.
Staff Dependent Fees	Staff Dependents pay all on-campus fees and extra class fees

**2019-2020 DUAL CREDIT PROGRAM (HST) & ADVANCED CREDIT PROGRAM (ACP)**

TUITION	RATES
Dual Credit Program (HST)	\$25.00/Credit
Advanced Credit Program (ACP)	\$100.00/Course

## **ACTION**

### **Agenda Item No. 4.5**

## **Adoption of the Fiscal Year 2019-20 All Funds Budget**

#### **Background:**

The following docket provides the Education and General, Auxiliary, Service Operations and Designated Operations Funds budgets for the 2019-2020 Fiscal Year (FY 20). The General Fund (GF) is the primary operating budget for the university and will be the bulk of the report. This includes the General Fund and Special General Fund which includes directed fee-for-service activities such as Distance Education Boeing Operations, etc.

The GF includes revenues from tuition and fees, state General Fund appropriations through the Public University Support Fund, Engineering Technology Support Fund and Oregon Renewable Energy Center and other miscellaneous income. These revenues are used to fund instruction, research, public service, academic support, student service, facilities and administrative expenses of the institution. Service and Designated Operations funds are minor pools of restricted or highly purpose driven resources and are *de minimis* portions of the overall budget. The Auxiliary budgets include housing operations, campus life, athletics, parking, student health and other various non-core operations, but are of significant size, scope and importance to the university overall.

The President outlined an overall goal when setting the budget to balance the revenues and expenses related to continuing operations in the General Fund budget, and to do so utilizing the Board's budget development priorities established at its January 24, 2019 meeting. When this budget is implemented it will allow for functional VPs and Deans to manage and prioritize investments within their divisions.

Investments of the universities fund balance are identified within the docket item as Strategic Investments and are aligned with the Board's adopted budget goals.

#### **Strategy:**

Budget development for next fiscal year began late during calendar year 2018 in an open and participatory process which relied on significant effort from Department Chairs, Deans, Directors and functional VPs. The Budget and Planning Office served as the coordinating body to facilitate communication, instruction, templates and collect submissions. The Fiscal Operations Advisory Council (FOAC) recommended a series of general budget principles to advise the President. These were further crafted by the President and financial leadership of the university and presented to the Board for adoption at their January 24, 2019 meeting. The principles adopted by the Board, and listed below, served as the evaluative factors for the President when establishing a budget recommendation. Incremental budget investments and reductions align with these priorities.

Oregon Tech 2020 Budget Development Goals:

- 1) Prioritize recruiting, retaining and graduating students,
- 2) Invest in faculty, staff, and infrastructure to support student success,
- 3) Align programs and initiatives with industry demand,

- 4) Manage operating efficiency in all aspects of the university, and
- 5) Manage short-term uncertainty – focus on long-term sustainability.

This budget development process represents the second time in university history in which there was significant involvement from personnel across the university, including chairs, deans and division directors. Traditionally the budget development and decision making process has been a highly centralized process.

Because of significant uncertainty related to state funding levels and cost increases including the rolling up of past budget allocations and mandatory cost increases from the state it was clear that options including reductions in overall operating expenses on an inflation/cost adjusted bases would be necessary. To that end, at the direction of the President, each division within the university was tasked by the Budget and Planning Office to develop three budget scenarios for their General Fund budgets. These included a reduction of 5% from their current (FY 19) budget, a flat budget and a positive 3% increase. Within these scenarios, division heads were to absorb mandatory cost increases related to PERS and PEBB. Conversely, within the scenarios, roll up expenses including the mid-year salary increases were annualized. Divisions did not have similar scenarios for Special General Fund Budgets.

Each division was invited to submit Strategic Investments which they believed advanced the needs of the university.

A council was established to advise the President in the budget development process, including the Senior Staff and the Chair of FOAC. Each Division executive was invited to present to the council its budget and the impact of each scenario as well as its proposed strategic investments. This process allowed for discussion and debate on budget investment levels. Council members were then invited to provide their feedback and reactions to the President to help support his decision making process. In an effort to broaden the feedback to the President, the list of proposed strategic investments was also shared with FOAC members, who were invited to score the investment ideas. The aggregate scores were then provided to the President.

In establishing the FY20 budget for the university the President tasked the BPO and VPFA to present options which delivered a break even operating budget despite a \$2.2M increase in PERS and PEBB, \$500k increase including the roll-up impact of mid-year salary increases and \$4.3M in roll-up costs from the mid-year budget adjustment approved by the Board at their January 24, 2019 meeting. Investments made during the current year were linked tightly with the Short Term Action Plan Goals approved by the Board. These goals are coming to a close at the end of this academic year, though many actions and initiatives are expected to continue into the new fiscal year, serving as the building blocks, as a new strategic plan is developed. The university continues to be well poised for enrollment growth, but must continue to focus on streamlining administrative processes and increasing efficiency in academic operations across all locations and modalities to accommodate this growth.

Revenues are expected to increase \$3.1M, largely due to net tuition revenue, assuming the 9% tuition increase for Academic Year 2019-2020 is approved by the Board of Trustees and the Higher Education Coordinating Commission.

**Process:**

The Budget and Planning Office led an inclusive budget development process. This process pushed budget development down to the department level, but required the functional VP to submit final budgets balancing across their departments. The budget principles which the President recommended to the Board were derived from those recommended by FOAC. Executive level review and feedback to the President was provided by a committee comprised of the Senior Staff and the faculty chair of FOAC.

Finalized budget assumptions, investment decisions and reductions were set by the President with support from the Vice President of Finance and Administration and the Assistant Vice President for Financial Operations and the Budget and Planning Office.

The process included the following major steps:

1. Establish assumed enrollment, tuition and state funding rates and incorporated these into the budget build, in a parallel process to the Legislative Session and the Tuition Recommendation Committee.
2. Distribute budget development templates to departments and functional vice presidents and required submission of multiple budget scenarios, including a 5% budget reduction, year over year flat budget and 3% budget increase. This built off of the FY 19 budget build process which shifted a significant amount of adjunct and overload budgets and some previously centrally held funds into departments and a reserve held by colleges in order to align authority and accountability to budget owners. Each budget template included the increased PERS and PEBB costs associated with the department's FTEs while it re-set the prior year base to include the roll-up of salary increases and prior classified employee steps.
3. Once the budgets were due and the templates closed and locked from editing by the functional vice presidents the BPO met with each division lead to understand the decisions they made, how they covered increasing costs to hit budget targets.
4. Strategic investment templates were provided to Division Directors and investments were brought forward from each division.
5. Aggregated budget requests from all divisions were presented to the Senior Staff and each division lead presented to a committee of the Senior Staff and the chair of FOAC, who were instructed to provide whatever feedback they wished to the President for consideration during the final budget build process.
6. The President and Vice President of Finance and Administration reviewed the aggregated budget, identified that divisions had, by in large, hit their budget targets in their General Fund indices, but had pushed expenses into the Special General Fund, and in many cases utilized reserves in excess of revenues in those accounts. This amounted to a significant planned overspending of projected annual revenues.
7. The President with the advice and support of the Vice President of Finance and Administration and the Assistant Vice President for Financial Operations identified strategies to ensure a balanced operating budget, by reviewing all budgets, new and replacement position requests and strategic funding opportunities. The result of this effort is described below.

## **Budget Assumptions**

The following assumptions were used in establishing the 2019-20 GF budget:

**Revenues** (utilizing 2018-19 forecast budget as the base for comparison):

1. Tuition rates were increased as proposed by the Tuition Recommendation Committee and the President. This assumption is contingent on Board approval at its May 30, 2019 meeting and approval by the Higher Education Coordinating Commission at its June 13, 2019 meeting. Briefly summarized, tuition has been assumed to increase by 9.0% on base undergraduate tuition for resident, non-resident and WUE students as well as an additive increase of 5% to tuition differentials, increasing from 25% to 30%. Enrollment was assumed to increase by 1% overall. This generated approximately: \$2.2M in additional revenues compared to the 2018-19 fiscal year end forecast.
2. Fee remissions were budgeted at \$4.5M, or 11.4% of gross tuition. This is an increase of \$566K from the current year, and a 14% increase from its current amount of \$3.9M. This increase is above the recommendation from the TRC.
3. State appropriations are budgeted using the HECC's SSCM funding model with PUSF revenues forecast at the Co-Chairs Recommended Budget of \$777M and assumes flat funding for Sports Lottery, the Engineering Technology Sustaining Fund, and the Oregon Renewable Energy Center. There has been indications from the legislature that the final three programs will be level funded for the upcoming biennium and that the state funding level is likely to be at or above the Co-Chairs Recommended Budget level. This resulted in an increase in state funding from the current year forecast budget of \$314K or 1.1%.
4. Other income was adjusted representing changes in expected OMIC, grant indirect and other miscellaneous income. Most revenues from this category have other offsetting expenses in the Special General Fund.
5. Resulting in a net increase in General Fund Revenue of \$3.01M or 4.8% from the current fiscal year.

**Expenses** (utilizing 2018-19 forecast budget as the base for comparison unless otherwise noted):

1. Operating expenses were budgeted as follows:
  - a. A -2% across the board funding scenario was applied to all divisions. This cut will be applied at the division level, and the functional lead (vice-president, associate Vice-President, or Dean) in charge of the division will be responsible to make these cuts and to do so in accordance with the budget development principles adopted by the Board. This resulted in \$1.3M in savings.
  - b. Eleven total new or replacement positions requested by the divisions in the flat budget scenario were eliminated. These additional position reductions are in excess of the 2% reduction in overall funding for each division. The functional lead will be allowed to substitute positions identified for reductions for like savings if they believe that position is necessary. This resulted in approximately \$750K in savings.
  - c. The full impact of prior year pay-plan increases were rolled up into the current fiscal year. This resulted in approximately \$500K of additional costs.
  - d. PERS and PEBB increases were included with department budgets, resulting in approximately \$2.2M in increased costs. These were offset in the flat budget scenario from the division leads through cuts in positions, S&S, adjunct pay, student employment, training and other sources.

- e. Salary savings of \$2.0M was included in the budget and will be pulled back centrally from department and division budgets to ensure anticipated salary savings are not spent within the source index since this is necessary to reach overall budget targets.
  - f. An operating contingency was established to allow for mid-year adjustments as necessary and will be utilized at the discretion of the President.
  - g. The net change in expenses allowed for a negative operating budget of net (\$112K).
2. Additional Investments are proposed in order to advance the institution and are aligned with the Board's Budget Development Goals. Among the investment are the following:
- a) X-Ray Equipment Replacement and partnership
  - b) Multicultural Center
  - c) Military Outreach
  - d) DPT & Rural Health
  - e) Website Redesign
  - f) Foundation Capacity - Prospect Research
  - g) Partnerships (SOHEC, LW-Tech, International)
  - h) Strategic Planning
  - i) Campus beautification, and
  - j) Strategic Enrollment Management.

The net strategic investments in the institution account for \$1.73M in total funding, and result in a net use of fund balance totaling \$1.844M for Fiscal Year 2019-20.

<b>FY20 General Fund Budget Request</b>	
<b>Revenue</b>	
State Funding	\$29,259,133
Tuition & Fees	\$39,369,386
Remissions	(\$4,500,000)
Other	<u>\$2,890,521</u>
<b>Total All Revenues</b>	<b>\$67,019,040</b>
<b>Expenses</b>	
Labor & OPE	\$53,431,121
Planned Salary Savings	(\$2,000,000)
Other Expenses	<u>\$15,699,920</u>
<b>Total Expenses</b>	<b>\$67,131,041</b>
<b>Net Revenue/(Loss)</b>	<b>(\$112,001)</b>
<b>Investments</b>	
Strategic Investments	\$1,731,873
<b>Total Strategic Investments</b>	<b>\$1,731,873</b>
<b>Net of FY20 Budget</b>	<b>(\$1,843,874)</b>

**Fund Balance:**

Oregon Tech is forecast to end FY19 with \$11.46M in General Fund reserves or 17.9% in operating reserves. With the FY20 budget as presented ending fund balance is expected to be \$9.61M in General Fund reserves or 14% in operating reserves. This falls within the Board's designated fund balance range.

**Budget Investments:****Strategic Investments**

Through a collaborative development process the President sought input from across the leadership team and university to identify strategic investments which could be undertaken to advance the university. These initiatives, which represented the best thinking of a diverse set of university faculty, departments and staff, were scored by members of FOAC and the senior leadership team. Those which were most aligned with the overall needs of the university and the Board's budget priorities were included in the funding recommendation. Each initiative is listed below, with a short description of the project, its overall cost and the Board objective it is designed to respond to.

For ease of reading, the Board's Budget Development Goals, which are applicable to investment decisions are as follows;

- 1) Prioritize recruiting, retaining and graduating students,
- 2) Invest in faculty, staff, and infrastructure to support student success,
- 3) Align programs and initiatives with industry demand, and
- 4) Manage operating efficiency in all aspects of the university.

<b>Fiscal Year 2019-2020 Strategic Investments</b>		
<b>Initiative</b>	<b>Investment Level</b>	<b>Board Objective</b>
X-Ray Equipment Replacement - Year 1 of 5	\$ 570,000	(1) (3)
Launch Multicultural Center	\$ 85,000	(1) (2)
Military Outreach	\$ 145,000	(1) (2) (3)
DPT & Rural Health	\$ 400,000	(1) (3)
Website Redesign	\$ 150,000	(1)
Foundation Capacity - Prospect Research	\$ 50,000	(2)
Partnerships (SOHEC, LW-Tech, International)	\$ 100,000	(1)
Strategic Planning	\$ 75,000	(2) (4)
Campus beautification	\$ 65,000	(1)
Strategic Enrollment Management	\$ 85,000	(1)
Strategic Planning	\$ 6,783	N/A
<b>Total Strategic Investments</b>	<b>\$ 1,731,873</b>	

**Operating Contingency**



Within the operating budget the university has established an Operating Contingency which can be accessed by the President. This includes set aside resources for mid-year salary adjustments if total fee paying student credit hour enrollment and total revenue targets are met. It also includes a small reserve for unforeseen and unbudgeted events. As a result of the -2% funding level for each division it is unlikely that functional vice presidents will have additional resources to invest in new or unforeseen events. Any adjustments to their budgets throughout the year will be made by reallocating existing budgeted resources. There is continued uncertainty regarding the settlement of the SEIU contract which is currently in negotiations. Limited resources have been set aside to fund increases and will be supported through further budget or position reductions. The total operating contingency fund is \$1.30M.

### **Summary**

The 2019-2020 General Fund budget described within this docket is designed to balance the significant short-term uncertainty the university is experiencing with investments in the long-term growth of the institution. Unfortunately rising pressure on the university's budget from PERS, PEBB and other employee costs, along with finite state and tuition resources cause a situation in which hard choices must be made. These include reducing 11 previously budgeted or approved positions next fiscal year, 2% cuts across each department and some additional tactical reductions and the elimination of many sought after uses of reserves. These choices will be hard felt across the university and in particular areas which have little to no fiscal space to make reductions without impacting students. That said, it is important as a university that we make reductions wherever possible in order to create resources to invest in new initiatives which will drive enrollment growth and student success over the coming years and to put the institution in a position to balance its budget over the medium term.

Included within this budget are needed investments in lab equipment in the College of Health, Arts and Sciences, initiatives focused on a growing diverse population of Oregonian and non-resident students and attracting and retaining current and former members of the armed forces. These investments will continue the work being completed under the 11 Short-Term Action Goals approved by the Board for the 2018-19 Academic Year and will sustain the positive momentum of the institution into the coming years.

The planned use of reserves necessary to make such investments are expected to bear in terms of increased tuition paying enrollment and student completions over the coming years. By making significant reductions in expenses this year, many of which are offset by increases in PERS and PEBB, while investing in enrollment growth Oregon Tech is placing itself on a sustainable path forward. In order to ensure this sustainable path, Oregon Tech's senior leadership team will develop a multi-year sustainability plan and report back to the Board during next fiscal year how this plan, when integrated with the themes identified in the strategic planning process, will better secure the positive trend at Oregon Tech over the past several years.

### **Recommendation**

Staff recommends the Finance and Facilities Committee recommend to the Board of Trustees adoption of the proposed Fiscal Year 2019-20 budget, including all fund types, as recommended by the President and outlined in the docket, at its May 30, 2019 meeting.

**Attachments**

- [General Fund Budget Overview](#)
- [Auxiliary Fund Budget](#)
- [Designated Operations Fund Budget](#)

**General Fund Budget Overview**

<b>FY20 General Fund Summary</b>			
<b>Acct</b>	<b>FY20 Budget</b>	<b>FY19 Forecast</b>	<b>FY19 Adj Budget</b>
State Allocations	\$29,259,133	\$28,945,097	\$28,945,097
Tuition & Fees	\$39,369,386	\$35,785,329	\$38,029,935
Remissions	(\$4,500,000)	(\$3,934,420)	(\$4,558,482)
Others	\$2,890,521	\$3,159,852	\$2,465,175
<b>Total Revenue</b>	<b>\$67,019,040</b>	<b>\$63,955,858</b>	<b>\$64,881,725</b>
Unclassified	\$27,859,697	\$25,729,823	\$25,563,980
Classified	\$6,416,720	\$5,811,376	\$5,883,703
Student	\$1,062,841	\$1,034,136	\$1,077,346
GTA	\$116,000	\$145,610	\$193,610
OPE	\$18,841,711	\$15,223,444	\$16,579,779
Salary Savings	(\$2,000,000)		
<b>Total Labor</b>	<b>\$52,296,969</b>	<b>\$47,944,389</b>	<b>\$49,298,418</b>
Travel	\$1,121,872	\$987,073	\$1,067,122
Professional Development	\$435,028	\$78,497	\$449,384
Supplies & Services	\$17,355,505	\$12,515,276	\$14,035,169
Capital	\$772,725	\$691,766	\$1,179,375
Net Transfers	\$1,653,284	\$3,330,036	\$3,128,446
Debt Service	\$700,000	\$1,468,483	\$1,468,483
Internal Sales	(\$1,557,816)	(\$870,401)	(\$829,100)
Equipment Savings	\$280,000		\$0
Reductions	(\$4,194,653)		
<b>Total Non-Personnel Expense</b>	<b>\$16,565,945</b>	<b>\$18,200,730</b>	<b>\$20,498,879</b>
<b>Total All Expenses</b>	<b>\$68,862,914</b>	<b>\$66,145,119</b>	<b>\$69,797,297</b>
<b>Net (Revenue - Expenses)</b>	<b>(\$1,843,874)</b>	<b>(\$2,189,261)</b>	<b>(\$4,915,572)</b>

(1) Reductions will be allotted to their respective budget categories by division leads as they appropriate reductions.

Auxiliary Fund Budget

FY20 Auxiliary Fund Summary		
Acct	FY20 Budget	FY19 Adj Budget
Carryover	\$876,943	\$0
Incidental Fee Revenue	\$3,416,428	\$3,421,750
Sports Lottery Funding	\$458,620	\$401,824
Room Fees	\$2,944,454	\$2,800,540
Board Fees	\$1,211,760	\$1,152,534
Other Revenue	\$2,845,847	\$2,683,108
<b>Total Revenue &amp; Carryover</b>	<b>\$11,754,052</b>	<b>\$10,459,756</b>
Unclassified	\$1,882,499	\$1,713,859
Classified	\$809,979	\$883,777
Student	\$565,318	\$532,856
GTA	\$0	\$0
OPE	\$1,800,722	\$1,561,708
<b>Total Labor</b>	<b>\$5,058,518</b>	<b>\$4,692,200</b>
Travel	\$565,918	\$543,553
Assesments	\$544,938	\$0
Supplies & Services	\$4,450,264	\$4,900,653
Capital	\$118,000	\$208,600
Net Transfers	(\$1,719,500)	(\$2,156,739)
Debt Service	\$1,277,101	\$1,343,605
Internal Sales	\$145,100	\$0
Equipment Savings	\$692,740	\$0
<b>Total Non-Personnel Expense</b>	<b>\$6,074,561</b>	<b>\$4,839,672</b>
<b>Total All Expenses</b>	<b>\$11,133,079</b>	<b>\$9,531,872</b>
<b>Net (Revenue - Expenses)</b>	<b>\$620,973</b>	<b>\$927,884</b>

(1) Items were previously budgeted within S&amp;S.

**Designated Operations Fund Budget**

<b>FY20 Designated Fund Summary</b>		
<b>Acct</b>	<b>FY20 Budget</b>	<b>FY19 Adj Budget</b>
Carryover	\$180,094	\$0
Other Revenue	\$49,100	\$32,000
<b>Total Revenue &amp; Carryover</b>	<b>\$229,194</b>	<b>\$32,000</b>
Unclassified	\$0	\$25,800
Classified	\$2,250	\$0
Student	\$2,290	\$0
GTA	\$0	\$0
OPE	\$373	\$4,386
<b>Total Labor</b>	<b>\$4,913</b>	<b>\$30,186</b>
Travel	\$0	\$0
Supplies & Services	\$15,775	\$27,075
Capital	\$0	\$0
Net Transfers	\$0	\$0
Debt Service	\$0	\$0
Internal Sales	\$0	\$0
Equipment Savings	\$0	\$0
<b>Total Non-Personnel Expense</b>	<b>\$15,775</b>	<b>\$27,075</b>
<b>Total All Expenses</b>	<b>\$20,688</b>	<b>\$57,261</b>
<b>Net (Revenue - Expenses)</b>	<b>\$208,506</b>	<b>(\$25,261)</b>



## **ACTION ITEM**

### **Agenda Item No. 4.6**

## **Radiologic Science Program Equipment Partnership and Authorization for the Purchase of Equipment in Excess of One Million Dollars**

### **Background**

The Radiologic Sciences Program (RDSC) within the Medical Image Technology Department is among Oregon Tech's flagship programs. This program includes education on tools used in clinical imaging such as Computed Tomography (CT) scanners, Magnetic Resonance Imaging (MRI), Mammography and Radiography. The quality of education and desirability of our graduates for employers within RDSC program is directly tied to the quality and reliability of the equipment students utilize during their training.

The majority of the current RDSC equipment was purchased as refurbished units during the initial buildout of the Dow Center for Health Professions in 2007. In 2009 two machines failed and were irreparable and have been stripped of usable parts over time to sustain other machines. Standard clinical practice is to replace X-Ray equipment every five to seven years. The current equipment is now at least 12 years old and significantly out of date. Many units are no longer functioning effectively or reliably enough for educational purposes. Because of the equipment's age refurbishing the existing equipment is neither cost effective nor pedagogically sound. Replacing the aged-out equipment is necessary to sustain the quality and viability of the program.

Recruitment and enrollment channels for RDSC are strong and serve as a tool to enroll many students who do make it through the selection process and into one of the limited cohort space available. These students often subsequently enroll in other non-MIT majors. This department is among the "differential" departments in which incremental tuition beyond the normal base rate is charged to support small cohorts and high equipment needs. Further, the state through the Student Success and Completion Model, provides direct funding to health technology programs in recognition of their high operating and capital costs.

Staff is seeking authorization for the President, or designee, to enter into a purchase agreement in excess of \$1 million dollars as is required by the Board's policy on delegation of authority to refit the existing RDSC laboratory space and to execute associated financing agreements.

The university and department are engaged in advanced discussions with Konica Minolta, a major medical imaging technology manufacturer, to outfit these labs and which is expected to result in a strategic partnership between the two entities. This partnership is likely to include both the College of Health, Arts and Sciences as principle users of the technology and the College of Engineering Technology and Management including internships and faculty engagement relating to multiple programs including Electrical, Mechanical and Manufacturing Engineering as well as Computer Science Engineering Technology.

### **Project Scope**

The project envisioned includes three major components; equipment, service and training related to the medical imaging equipment.

### **Equipment**

- Seven (7) fully equipped X-Ray rooms, including:
  - o Five (5) standard overhead digital X-Ray tubes and tables
  - o Two (2) trauma bays and digital X-Ray tubes, including simulation and live equipment
  - o Portable digital X-Ray unit
- De-installation of existing equipment, freight and installation of new equipment
- Software supporting the equipment

### **Service**

- Preventative maintenance and calibrations during five-year service coverage period
- Five (5) year full service agreement, including digital system and hardware, all parts and labor
- Room drawings and construction support during installation

### **Training**

- Technical training for university biomedical engineer on the complete digital system at the same level as a firm employed field service engineer

Capital construction, including the removal of existing non-structural walls, removing lead lining, and installing newly designed spaces accommodating state-of-the-art equipment and meeting proper safety standards will be necessary and is budgeted separately. Engineering and project planning is underway in order to ensure the project is completed before the beginning of the 2019-2020 academic year in late September 2019.

### **Partnership**

Oregon Tech and Konica Minolta are actively negotiating a partnership agreement to stand along with and integral to the purchase of RDSC equipment. This strategic partnership agreement between Oregon Tech and Konica Minolta will serve both entities as they seek relationships which add mutual value. For Oregon Tech this includes closer integration between the Allied Health programs and key equipment suppliers reducing the overall cost of equipment and increasing the ability to sustain these highly equipment intensive and expensive programs. Further, within RDSC updating equipment to state-of-the-art will create the opportunity to broaden the suite of offerings within the program from its current traditional degree seeking students to continuing education for practitioners from across the Pacific Northwest and broader western region. Konica Minolta is a leading international advanced equipment manufacturer and is seeking a partnerships with universities specializing in manufacturing, mechanical and electrical engineering disciplines related to the manufacture and research and development of state-of-the-art digital imaging equipment, as well as information analysis/precision medicine software. This is in strong alignment with existing

engineering disciplines at both the Klamath Falls and Portland-Metro locations and with programs in the development process including the emerging data science program.

This partnership is in alignment with and furthers Oregon Tech's vision of becoming *Industry's University*.

### **Financial and Operational Impact**

The expected total cost of the project remains under negotiation with the vendor, but is expected to be in excess of \$1 million dollars, including capital construction as well as removal of existing equipment, shipping and installation of new equipment. The university is in discussions with the Oregon Tech Foundation and the vendor's equipment leasing partner, US Bank, to determine appropriate financing for the project. It is expected that the project will be financed using a capital lease with a nominal terminal payment over a five-year amortization period.

In the FY 2019-2020 budget recommendation includes resources specifically set aside to support the expected lease/debt payments associated with the equipment and capital construction. Previously approved equipment funding for the department will be redirected towards the project as will funds available from the Oregon Tech Foundation specifically donated to support capital purchases within the College of Health, Arts and Sciences.

Medical Imagine Technology (MIT) is a marquee program of Oregon Tech and encompasses multiple sub-disciplines. MIT in total has grown every year for the past five years, reaching a high of 821 students at the Fall 2018 the census date. RDSC accounts for 150-160 students accepted within the program, including a cohort size of approximately 48 students annually. Nearly 200 students are pre-MIT students. Though that cohort has shrunk over the past five years it remains a sizable amount of the university's full time, on campus students.

The leadership of the College of Health, Arts and Sciences is working with RDSC to establish a plan to expand the current cohort capacity using the new equipment, implementing clinical and continuing education for medical staff in the Pacific Northwest on a fee-for-service basis and other revenue enhancing channels. This plan is expected to be complete and implementation beginning during the 2019-20 Academic Year. By pursuing a partnership with Konica Minolta there is significant opportunity to leverage their provider partnerships to improve career pathways and clinical placements for our students and as a market for continuing education for staff employed at hospitals equipped with Konica Minolta equipment.

The equipment purchase agreement includes a service agreement for a five-year term as well as training the universities biomedical engineer as a first response technician authorized by Konica Minolta to provide service on the equipment in-house both during the five-year service period and after. It is expected that the equipment will have a serviceable life of eight- to ten-years.

Given the relatively quick replacement cycles, and cost of equipment within the MIT department, the College of Health, Arts and Sciences will undergo an equipment capital planning exercise to allow for predictable and mindful equipment updating using both institutional, philanthropic and other revenues to maintain a consistent portfolio of state-of-the-art imaging equipment. This report will be complete by the end of Fall Term 2019.

**Recommendation**

Staff recommends the Finance and Facilities Committee recommend the Board of Trustees authorize staff to negotiate a purchase agreement in excess of one million dollars for the purposes of refitting Radiological Science Laboratory Space and enter into financing agreements to facilitate such a purchase and direct staff to report the final terms of the purchase agreement and financing arrangement to the Finance and Facilities Committee at its meeting immediately subsequent to the execution of such agreement.