

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



## Student Success And Completion Allocation Model Phase-in

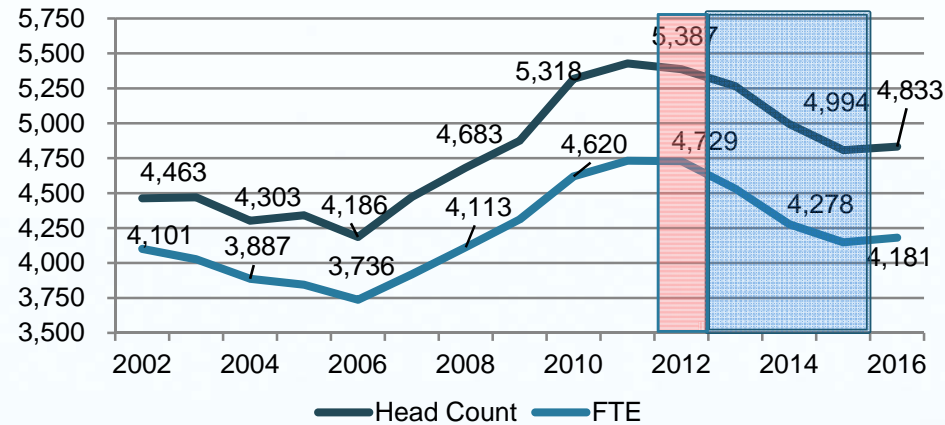
Table 1		Activity-Based and Outcomes-Based Funding Proportions				
Fiscal Year		2016	2017	2018	2019	2020
Outcomes-Based Allocation Proportion		20%	40%	60%	60%	60%
Activity-Based Allocation Proportion		80%	60%	40%	40%	40%

(1) Table 10		Stop Loss and Stop-Gain				
Fiscal Year		2016	2017	2018	2019	2020
Stop Loss		4.5%	2.0%	1.0%	0.0%	Disengaged
Stop Gain		$1.5 \times  \Delta PUSF $	2016+10%	2017+10%	2018+10%	Disengaged



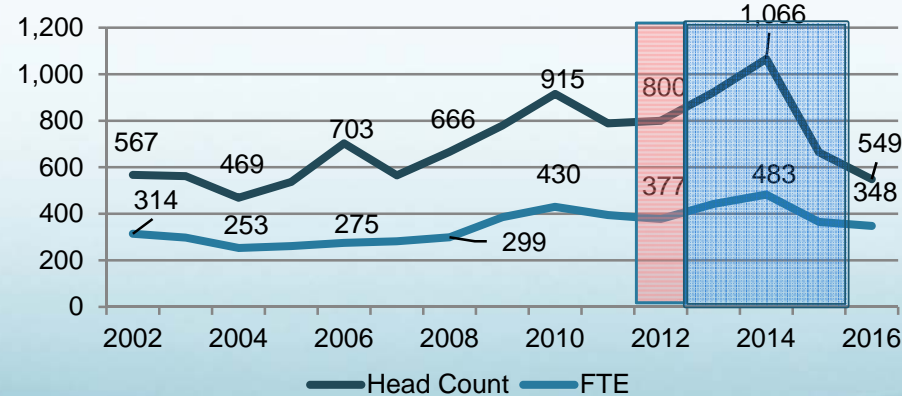
SSCM allocation is based on three year trailing degree and student credit hour data – 2013-14, 2014-15, and 2015-16.

## Undergraduate Fall Enrollment



\* Source: WOU Data Warehouse - Fall 4th week numbers

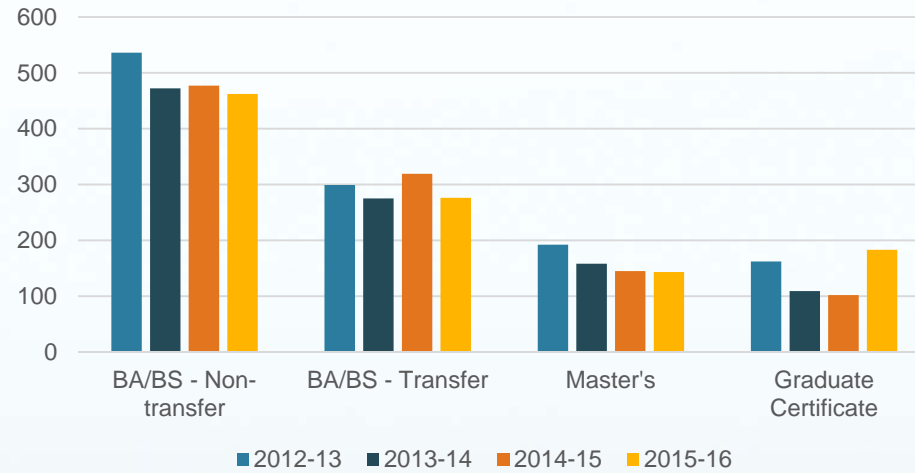
## Graduate Fall Enrollment



\* Source: WOU Data Warehouse - Fall 4th week numbers



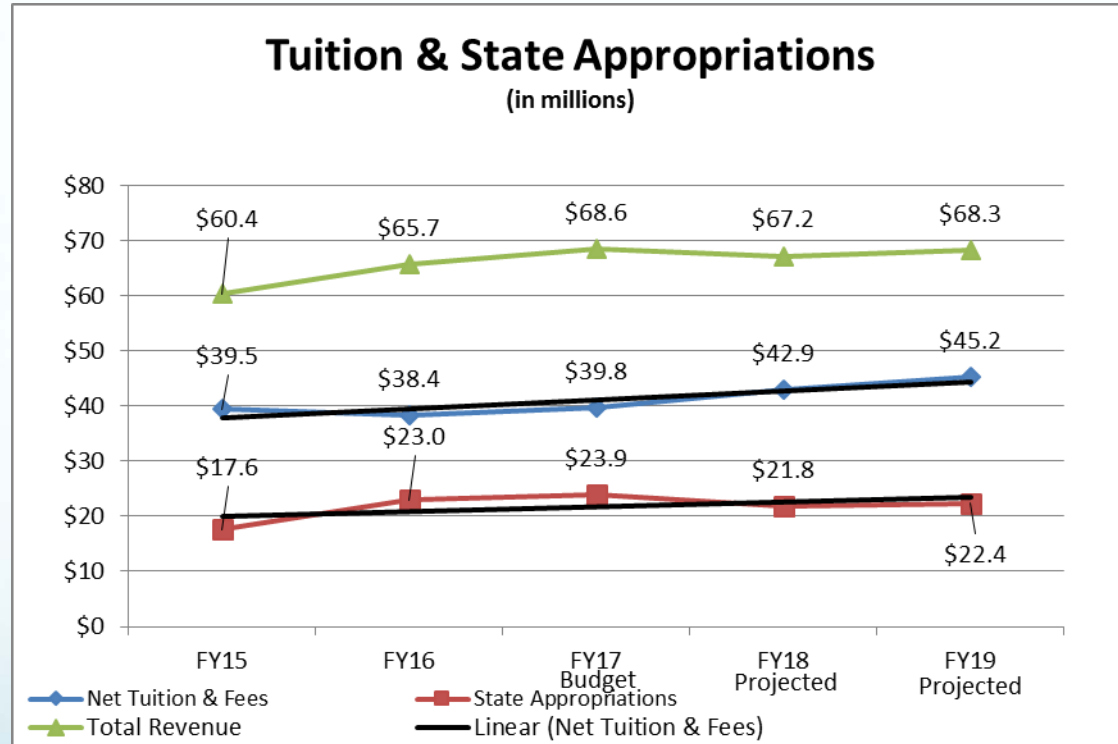
### WOU Degrees Granted



WOU SSCM Degrees 2013-16 - Resident degrees only unless otherwise noted

	2012-13	2013-14	2014-15	2015-16
BA/BS - Non-transfer	536	472	477	462
BA/BS - Transfer	299	275	319	276
Master's	192	158	145	143
Graduate Certificate	162	109	102	183
<b>Total</b>	<b>1,189</b>	<b>1,014</b>	<b>1,043</b>	<b>1,064</b>



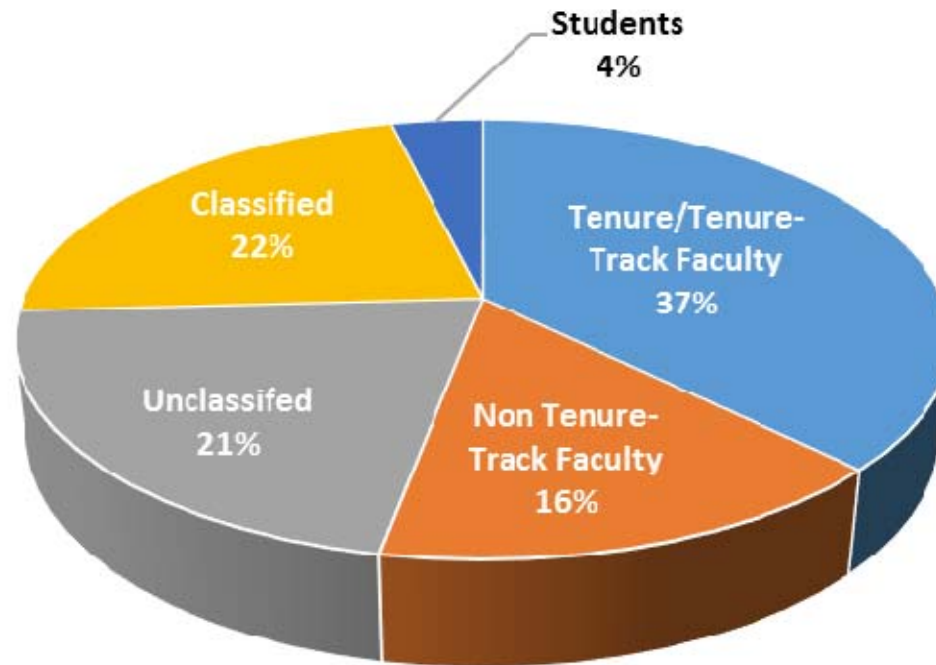


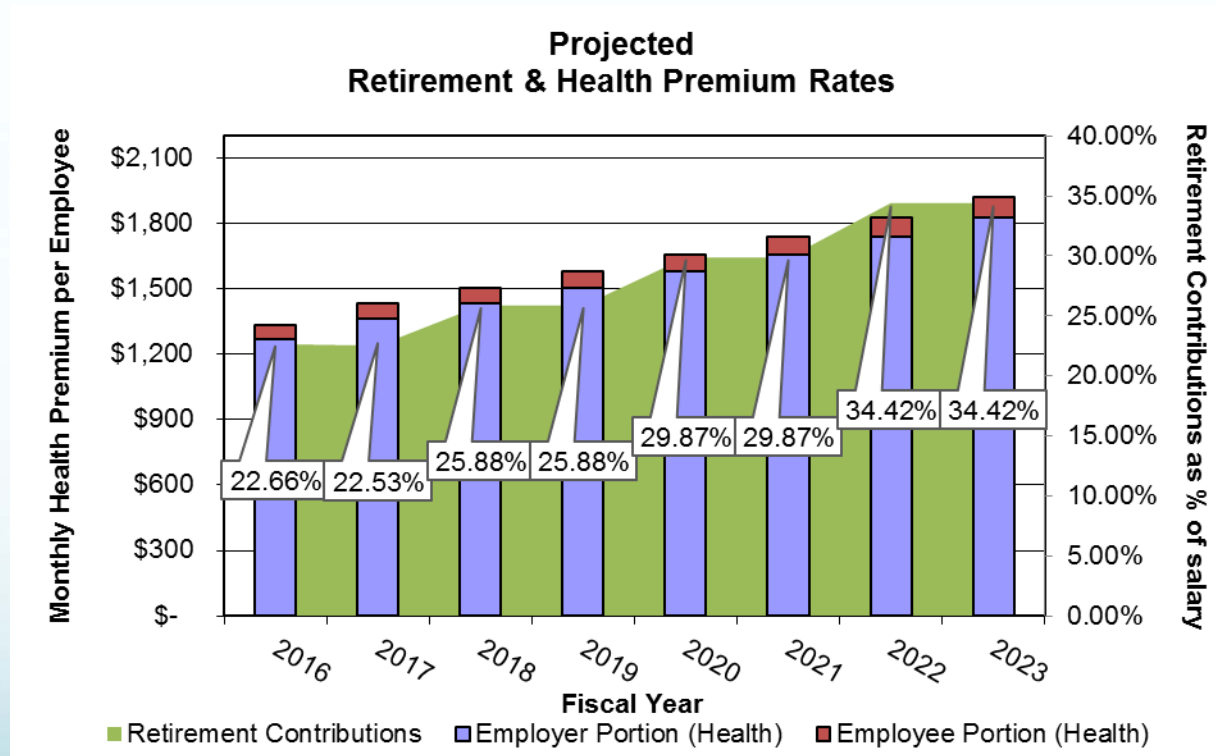
**Western Oregon University**  
**Education and General Fund Operations**  
**2017 - 19 Biennial Budget Projection**  
**Draft - For Discussion Purposes Only**

GRB/Appropriations	\$667.3M	
Resident Undergrad Choice	10%	5%
Resident Promise	20%	20%

	2017 Q2 Projection	FY17 Projection - FY16 Actual		2018 Projected Budget	FY18 Budget - FY17 Budget		2019 Projected Budget	FY19 Budget - FY18 Budget	
		\$ Δ	% Δ		\$ Δ	% Δ		\$ Δ	% Δ
State Appropriations	23,887,904	899,565	3.9%	21,819,123	(2,068,781)	-8.7%	22,415,901	596,778	2.7%
Tuition and Resource Fees, Net	39,755,700	1,367,690	3.6%	42,900,061	3,144,361	7.9%	45,230,639	2,330,577	5.4%
Other Revenue	3,592,698	(198,807)	-5.2%	3,561,285	(31,414)	-0.9%	3,561,285	-	0.0%
<b>Total Operating Revenue</b>	<b>67,236,302</b>	<b>2,068,448</b>	<b>3.2%</b>	<b>68,280,469</b>	<b>1,044,167</b>	<b>1.6%</b>	<b>71,207,824</b>	<b>2,927,355</b>	<b>4.3%</b>
<b>Expenditures</b>									
Total Personnel	54,685,542	4,971,641	9.7%	58,300,130	3,614,588	6.6%	61,078,059	2,777,930	4.8%
Supplies & Services	8,757,964	1,672,956	23.6%	8,558,511	(199,453)	-2.3%	8,757,964	199,453	2.3%
Capital Outlay	202,691	(155,464)	-43.4%	202,691	-	0.0%	202,691	-	0.0%
Total Transfers	<b>2,909,036</b>	<b>(1,631,254)</b>	<b>-35.9%</b>	<b>3,613,574</b>	<b>704,537</b>	<b>24.2%</b>	<b>3,682,345</b>	<b>68,771</b>	<b>1.9%</b>
<b>Total Expenditures</b>	<b>66,555,233</b>	<b>4,857,879</b>	<b>7.7%</b>	<b>70,674,905</b>	<b>4,119,672</b>	<b>6.2%</b>	<b>73,721,059</b>	<b>3,046,154</b>	<b>4.3%</b>
Change in Fund Balance	681,069			(2,394,436)			(2,513,235)		
Beginning Fund Balance	11,293,642			11,974,711			9,580,275		
Ending Fund Balance	11,974,711	681,069	6.0%	9,580,275	(2,394,436)	-20.0%	7,067,040	(2,513,235)	-26.2%
% Operating Revenues	17.8%			14.0%	Board directive 10-20% with target of 15%.		9.9%	Board directive 10-20% with target of 15%.	

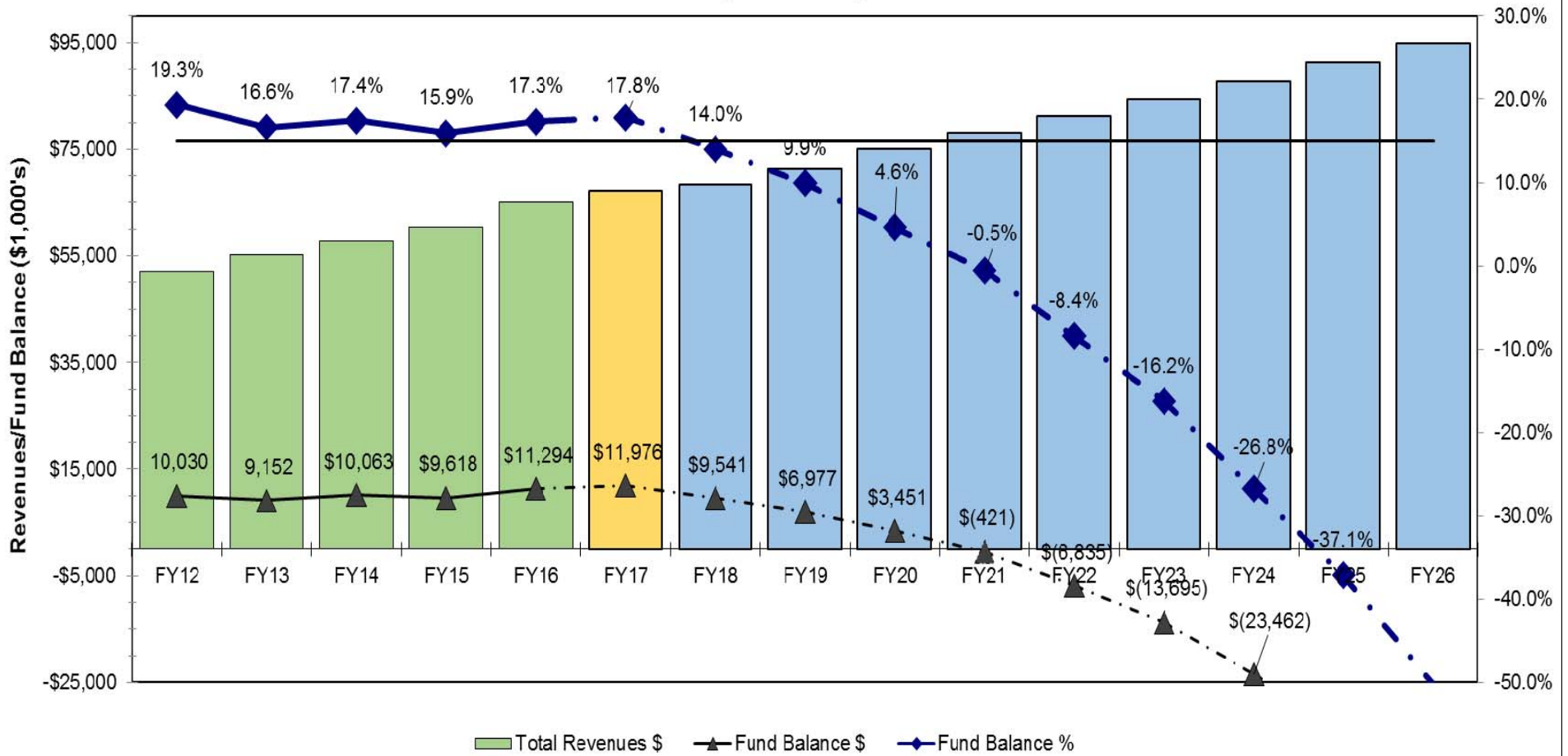
## Salaries by Employee Type







## WOU 10-year Projection



# Western Oregon University

## Proposed 2016-17 Tuition & Fees

### Final Proposal

	% Increase	New Rate	Prior Rate	Tuition 15 Credits	Building	Incidental	Health Service	WOU Health Center Construction	Student Rec./Union Center	Total Fees	Total Tuition & Fees	2016-17 Academic Year Total	2015-16 Academic Year Total	\$ Change Over Prior Year	% Change
<b>Undergraduate - Resident</b>															
WOU Promise 2015	0.00%	\$172	\$168	2,580	45	341	130	11	42	569	3,149	9,447	9,369	78	0.83%
Promise 2014	0.00%	\$168	\$164	2,520	45	341	130	11	42	569	3,089	9,267	9,189	78	0.85%
Promise 2013	0.00%	\$164	\$157	2,460	45	341	130	11	42	569	3,029	9,087	9,009	78	0.87%
Promise 2012	0.00%	\$157	\$143	2,355	45	341	130	11	42	569	2,924	8,772	8,703	69	0.79%
UO	4.80%	\$198	\$189	2,971	45	224	161	-	165	595	3,566	10,697	10,289	408	3.97%
OSU	2.20%	\$187	\$183	2,805	45	344	135	-	-	524	3,330	9,989	10,107	(119)	-1.18%
WOU Promise 2016	5.23%	\$181	\$172	2,720	45	341	131	11	42	570	3,290	9,870	9,369	501	5.35%
OSU - Cascades	2.20%	\$178	\$174	2,667	45	175	-	-	-	220	2,887	8,662	8,790	(128)	-1.45%
Oregon Tech - Klamath	3.00%	\$168	\$163	2,515	45	325	150	-	-	520	3,035	9,105	8,838	267	3.02%
Oregon Tech - Wilsonville	3.00%	\$168	\$163	2,518	45	64	30	-	-	139	2,657	7,972	7,785	187	2.40%
PSU	2.63%	\$156	\$152	2,340	45	221	129	-	44	439	2,779	8,337	8,124	213	2.62%
WOU Regular	2.65%	\$155	\$151	2,330	45	341	131	11	42	570	2,900	8,700	8,433	267	3.17%
SOU	2.70%	\$151	\$147	2,265	45	307	123	-	35	510	2,775	8,324	8,145	179	2.19%
EOU Resident- Advantage 2016	8.16%	\$159	\$147	2,385	45	255	150	-	28	478	2,863	8,589	8,049	540	6.71%
EOU Regular	3.55%	\$146	\$141	2,190	45	255	150	-	28	478	2,668	8,004	7,758	246	3.17%

# Western Oregon University

## Proposed 2017-18 Tuition Rates

Proposed as "Not to Exceed"

	FY17 Rate	FY18 Rate	\$ Increase /SCH	% Increase	Projected FTE	% of Total FTE	Weighted Average Increase
<b>Undergraduate:</b>							
<b>Resident</b>							
Traditional - Variable Rate	155.00	171.00	16.00	10.32%	1,827	67.03%	6.92%
Promise - 2013	164.00	164.00	-	0.00%	8	0.30%	0.00%
Promise - 2014	168.00	168.00	-	0.00%	206	7.55%	0.00%
Promise - 2015	172.00	172.00	-	0.00%	210	7.69%	0.00%
Promise - 2016	181.00	181.00	-	0.00%	219	8.02%	0.00%
Promise - 2017		220.00	39.00	21.55%	256	9.40%	2.03%
					<b>2,725</b>	<b>100.00%</b>	<b>8.95%</b>
Non-Resident	483.00	531.30	48.30	10.00%	236	27.31%	10.00%
<b>WUE</b>							
Traditional - Variable Rate	233.00	257.00	24.00	10.30%	421	48.73%	5.02%
Promise - 2013	246.00	246.00	-	0.00%	1	0.12%	0.00%
Promise - 2014	252.00	252.00	-	0.00%	48	5.56%	0.00%
Promise - 2015	258.00	258.00	-	0.00%	33	3.82%	0.00%
Promise - 2016	272.00	272.00	-	0.00%	60	6.94%	0.00%
Promise - 2017		330.00	58.00	21.32%	65	7.52%	1.60%
					<b>864</b>	<b>100.00%</b>	<b>16.62%</b>
<b>Graduate:</b>							
Resident	363.00	399.30	36.30	10.00%			
Non-Resident	610.00	671.00	61.00	10.00%			