

## POLICY CONCEPT FORM INSTRUCTIONS AND GUIDELINES

**All policy proposals – including new policy concepts, proposed revisions, or suggested repeals – must be submitted via this form to the Office of the University Secretary with appropriate supporting information and documents.** Completed submissions are forwarded to the President’s Policy Advisory Council (PAC), which ensures proper routing through the policy-making process. (See UO Policy I.03.01 for more information.)

**Please keep the following definition of a university policy in mind as you develop your concept:**

*A University Policy (“Policy”) is a policy that (1) has broad application or impact throughout the University community, (2) must be implemented to ensure compliance with state or federal law, (3) is necessary to enhance the University’s mission, to ensure institutional consistency and operational efficiency, or to mitigate institutional risks; or (4) is otherwise designated by the Board [of Trustees] or the President [of the University] as a University Policy.*

*A policy establishes rights, requirements or responsibilities. Excluded from this definition are things such as, but not limited to, implementation guides, operating guidelines, internal procedures, and similar management controls and tools.*

**To help facilitate as smooth a process as possible, please consider the following:**

1. Consult as many stakeholders as possible *prior to submitting* your concept. A primary role for the PAC is to ensure that appropriate offices, departments or groups are consulted.
2. Run your concept by the Office of General Counsel (OGC) *prior to submission*. OGC review is a required step in policy-making.
3. Please use the proper template for revisions or a new concept. The existing policy template (revisions) or a blank template (new concepts) can be obtained from the Office of the Secretary by emailing [uopolicy@uoregon.edu](mailto:uopolicy@uoregon.edu).
4. A “redlined” version of your concept is required for proposed revisions.
5. Include any appropriate related resources. Links are preferred, but supplemental documents are of course acceptable for items not online. Examples include:
  - Other policies or procedures related to, overridden by, necessary as a result of, or otherwise affiliated with your concept
  - Statutory or regulatory citations
  - Necessary notations or a summary of changes if changes are numerous or not obvious when reading the submitted template

**Please email [uopolicy@uoregon.edu](mailto:uopolicy@uoregon.edu) if you have any questions.**

## POLICY CONCEPT FORM

Name and UO Title/Affiliation:	Kathie Stanley
Policy Title/# (if applicable):	AVP for Student Life
Submitted on Behalf Of:	Student Life
Responsible Executive Officer:	VP for Student Life

**SELECT ONE:**  New Policy  Revision  Repeal

*Click the box to select*

**HAS THE OFFICE OF GENERAL COUNSEL REVIEWED THIS CONCEPT:**  Yes  No

If yes, which attorney(s): Kevin Reed, in process

### GENERAL SUBJECT MATTER

*Include the policy name and number of any existing policies associated with this concept.*

Former OAR 580.010.0080-0090 – payment of student fees

### RELATED STATUTES, REGULATIONS, POLICIES, ETC.

*List known statutes, regulations, policies (including unit level policies), or similar related to or impacted by the concept. Include hyperlinks where possible, excerpts when practical (e.g. a short statute), or attachments if necessary. Examples: statute that negates the need for or requires updates to an existing policy; unit level policy(ies) proposed for University-wide enactment; or existing policies used in a new, merged and updated policy.*

This policy is no longer needed due to other existing policies:

1. Retention and delegation of authority - <https://policies.uoregon.edu/vol-1-governance/ch-1-governance-board-affairs/retention-and-delegation-authority>
2. New ASUO policy (in process)
3. Tuition and fee policy book, adopted annually by BOT - <https://policies.uoregon.edu/vol-3-administration-student-affairs/ch-3-tuition-student-fees/tuition-and-fee-policy-book>
4. Tuition-setting process - [http://trustees.uoregon.edu/sites/trustees2.uoregon.edu/files/resolution\\_-\\_amendment\\_to\\_tuition-and\\_and\\_fee-setting\\_process\\_-\\_september\\_11\\_2015.pdf](http://trustees.uoregon.edu/sites/trustees2.uoregon.edu/files/resolution_-_amendment_to_tuition-and_and_fee-setting_process_-_september_11_2015.pdf)
5. Oregon Revised Statutes 352.102 - [https://www.oregonlegislature.gov/bills\\_laws/ors/ors352.html](https://www.oregonlegislature.gov/bills_laws/ors/ors352.html)
6. ORS 461.543 - [https://www.oregonlegislature.gov/bills\\_laws/ors/ors461.html](https://www.oregonlegislature.gov/bills_laws/ors/ors461.html)
7. Higher Education Coordinating Commission OARs - [http://arcweb.sos.state.or.us/pages/rules/oars\\_700/oar\\_715/715\\_013.html](http://arcweb.sos.state.or.us/pages/rules/oars_700/oar_715/715_013.html)

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**STATEMENT OF NEED**

*What does this concept accomplish and why is it necessary?*

Everything in this policy is now outdated (i.e., we don't participate in the program anymore), covered in ORS revised by SB270 (2013), covered in forthcoming ASUO policy, or (and in some cases "and"), the board's established policies on the delegation of authority, annual tuition and fee book, or tuition-setting processes.

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**AFFECTED PARTIES**

*Who is impacted by this change, and how?*

No one as this repeal doesn't actually change any existing authorities or practices

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**CONSULTED STAKEHOLDERS**

*Which offices/departments have reviewed your concept and are they confirmed as supportive? (Please do not provide a list of every individual consulted. Remain focused on stakeholders (e.g. ASUO, Office of the Provost, Registrar, Title IX Coordinator, etc..))*

<b>Name</b>	<b>Office</b>	<b>Date</b>
Andrew Dunn	ASUO	Multiple
Sue Eveland	Registrar	Multiple
JP Monroe	Institutional Research	Multiple
Brian Stanley	Residency Officer (Admissions)	Multiple

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# Payment of Student Fees

Reason for Policy:

This policy contains matters pertaining to student fees.

Entities Affected by this Policy:

All students and employees who interact with the above mentioned matters

Enactment & Revision History:

Technical revisions enacted by the University Secretary on September 2, 2015.

Became a University of Oregon Policy by operation of law on July 1, 2014.

Former Oregon Administrative Rule Chapter 580 Division 10, Sections 0080 through 0090.

Policy:

## A. Payment of Nonresident Instruction Fee

(1) All students who are classified as nonresidents shall pay a nonresident fee.

**Commented [KLS1]:** This shouldn't require a policy for people to understand.

(2) Refunds of the nonresident fee may be granted if the student shows that the classification previously assigned was in error, but no such refund shall be made unless the student applies and submits all supporting information for residency status prior to the last day to register for the term in which the student seeks change of status.

**Commented [KLS2]:** According to the UO residency officer, if we made an error we will change it, even retroactively. We don't penalize student for our mistakes.

## B. Waiver of Nonresident Instruction Fee

(1) Notwithstanding the provisions of Section A, the following nonresident students shall be permitted to pay instruction fees at the same rates as Oregon resident students:

**Commented [KLS3]:** Waivers of non-resident fee are now covered in the tuition and fee policy book adopted annually.

(a) Students who are residents of the State of Washington attending an Oregon institution and who are granted a tuition waiver under the terms of reciprocity agreement;

**Commented [KLS4]:** Haven't had reciprocity with WA in since the mid 80's

(b) Eastern Oregon University students who:

(i) graduated from a state-recognized high school in Oregon, Washington, or Idaho within the previous three year period; or

(ii) are lawful residents of Idaho or Washington; or



(iii) were enrolled in an institution of higher education in Idaho or Washington at any time during the preceding academic year; or

(iv) were enrolled students at Eastern Oregon University during the academic year 2011-12, so long as they continue to make satisfactory academic progress toward graduation without a break in enrollment (excluding summer term);

(c) Graduate students who are residents of a participating WICHE state enrolled in a WICHE Regional Graduate Program or a WICHE northwest doctoral student exchange program at a Department institution; and

**Commented [AW5]:** We no longer participate in WICHE/WUE, though there are a few students grandfathered who are completing their programs.

(d) Students attending Oregon graduate or professional schools under terms of the WICHE Compact.

(2) When provisions of this policy are limited to residents of specific states or counties, determination of residence in those states or counties shall be made in the same manner as for students claiming Oregon residence.

**Commented [KLS6]:** Obsolete / residency rules apply

### C. Scholarships Funded by Sports Lottery Revenue

(1) The Office of Academic Affairs will allocate scholarship funds as authorized by ORS 461.543 (5)(b) and funded from the Sports Lottery Account. Scholarship funds will be awarded for post-baccalaureate professional and graduate students and will be divided equally between scholarships awarded on the basis of need and scholarships awarded on the basis of academic merit.

**Commented [KLS7]:** Scholarships are under the purview of the financial aid office and, further, those under the Sports Lottery Revenue program are covered in state statute.

(2) For purposes of this policy:

(a) "Academic Merit" will be determined by acceptance into an OSSHE graduate program, by a record of scholarly achievement as demonstrated by grade point average, test scores on nationally recognized admissions tests or other evidence of scholarly or creative ability.

(b) "Need" will be determined in accordance with the federal guidelines established pursuant to the Higher Education Act of 1965, as amended, together with consideration of the costs associated with an applicant's academic program.

(3) The Vice Chancellor for Academic Affairs shall establish additional criteria and procedures consistent with this policy for selecting among applicants eligible for scholarships under this policy.

### D. Student Exchanges

(1)(a) Under the WICHE student exchange program, certification of students as Oregon residents for purposes of attending institutions not under Board control or in other states shall be guided by rules set forth in this division;

**Commented [KLS8]:** We no longer participate in WICHE/WUE, though there are a few students grandfathered who are completing their programs.

(b) Applications for support through the WICHE Professional Student Exchange Program (PSEP) must be received by the Oregon WICHE Certifying Officer on or before October 15 of the year preceding the year for which support is sought. An application received after that date in an envelope postmarked not later than October 15 will be deemed to have been received on the 15th. PSEP applicants must be Oregon residents. Residency shall be determined as of the date of the application for PSEP support, not as of the date of expected admission or registration to a participating program. When PSEP funding is insufficient to support all certified applicants within a field, the Oregon WICHE Certifying Officer will work with the participating PSEP programs to which the applicants have applied to determine the ranked order of the applicants. Support will be offered within the available funding according to the rankings so established.

(2)(a) The University may enter into agreements with individual institutions in other states or other countries whereby resident students specified by name in the Oregon institutions may transfer to the other institution, and an equal number of students specified by name from the other institution may transfer to the Oregon institution with a reciprocal waiving of additional fees ordinarily assessed to nonresident students in both institutions;

(b) The recommendation for a student exchange program, together with a copy of the proposed agreement between the institutions, shall be approved by the President or designee before the exchange program is undertaken. Further, the program recommendation and the proposed agreement between institutions shall set forth the reasons the exchange would be of particular benefit to the students in their chosen study programs and specify: fees to be paid by incoming and outgoing students; student responsibility for costs of transportation, housing, books, board and room and other incidentals; responsibility of institutions to assist students in obtaining housing, counseling and interpreters; procedures to be followed in state entitlement funding and counting credit hours; action to be taken if students do not regularly participate in the academic program being pursued; and procedures for providing transcripts;

(c) If an approved agreement provides for exchange of equal numbers of students, then unforeseen circumstances that later might cause a student to withdraw from the program shall not void the arrangements agreed upon by the two institutions.

(3) Attendance at the University as an exchange student from another state or country cannot be used in establishing residence.

(4) Notwithstanding any other policy, and effective fall term of the 1989-90 academic year, the University may provide that a vacant WICHE opening may be occupied by a nonresident, non-WICHE student who agrees not to seek residency status for the duration of the student's degree program and who agrees to pay a fee equal to the nonresident tuition fee for the duration of that program.

#### **E. Enrollment of Spouse and Dependent Children**

(1) The spouse and dependent children of regular University staff members with a full-time equivalent of at least .50 may enroll as students at resident fee rates in Oregon public universities. Effective January 1, 1999, for purposes of this rule, "spouse" includes the same sex

**Commented [KLS9]:** This is covered in the staff tuition benefit policy.



domestic partner of an employee. The President or designee shall establish criteria to determine domestic partner eligibility.

(2) The spouse and dependent children of visiting instructors from other countries or other states with a full-time equivalent of at least .50 may enroll in Oregon public universities at resident fee rates during the terms that the parent, guardian, or spouse is serving the University as a visiting instructor.

#### **F. Student Involvement in Development of Proposed Resident Undergraduate Tuition Rates**

(1) The Board shall establish the tuition and fees to be assessed at the University in accordance with applicable statutes and upon the recommendation of the President. This section shall not impair the entities of student government or the Board under ORS 351.070(3)(d).

(2) The University will establish a process for student participation in the development of recommended rates for resident undergraduate tuition. The planned process will be communicated to the duly elected student government for discussion and input.

(3) Prior to the formal submission of proposed tuition rates to the Board, or designee, the President, or designee, will provide an opportunity for the duly elected student government to consider and comment on the proposed rates. Efforts shall be made by both the appropriate student representatives and members of the university administration to accomplish this exchange in a timely manner that 1) provides for adequate student consideration and takes into account the academic calendar and 2) allows the University to meet necessary deadlines for submission of proposals.

(4) As part of formally submitting rate proposals to the Board, or designee, the President (or designee) will convey: 1) the process used by the University to involve students in the development of recommended tuition rates and 2) the specific resident undergraduate tuition rates being proposed.

#### **G. Incidental Fee Guidelines and Procedures**

(1) The Board shall establish the incidental fee to be assessed at the University in accordance with applicable statutes and upon the recommendation of the President. This section shall not impair the entities of student government or the Board under ORS 351.070(1)(d).

(2) The duly recognized student government shall designate student representatives to meet with the President (or designee) for the purpose of formulating or modifying guidelines and procedures to be followed at the University in budgeting, allocating, and recommending the amount of incidental fee income. Such guidelines and procedures (and modifications thereof) shall be subject to approval by the Board. If the student government and the President fail to agree, the Board shall formulate the guidelines and procedures.

**Commented [KLS10]:** This is now covered by the board policy on the retention and delegation of authority, state statute, and the related board established process (required by statute) on tuition setting requirements.  
[http://trustees.uoregon.edu/sites/trustees2.uoregon.edu/files/resolution\\_-\\_amendment\\_to\\_tuition-and\\_and\\_fee-setting\\_process\\_-\\_r\\_september\\_11\\_2015.pdf](http://trustees.uoregon.edu/sites/trustees2.uoregon.edu/files/resolution_-_amendment_to_tuition-and_and_fee-setting_process_-_r_september_11_2015.pdf)

**Commented [KLS11]:** See prior comment.  
Also, ASUO has reviewed and agrees this is unnecessary.

(3) Guidelines and procedures formulated pursuant to Section (G)(2) of this policy shall provide at least for the following:

(a) Designation of either the recognized student government or other entity designated in the established guidelines and procedures (hereinafter cited as other designated entity) with which the President communicates;

(b) All student members of incidental fee committees and subcommittees thereof shall be students maintaining at least half-time status;

(c) All meetings of incidental fee committees and subcommittees thereof shall be open to the public and appropriate notice (to be specified in the guidelines and procedures) shall be given;

(d) Budget and allocation recommendations to the President shall be aggregated by three major categories: student union activities; educational, cultural and student government activities; and athletic activities; and shall be submitted in writing;

(e) The President shall within a reasonable time (to be specified in the guidelines and procedures) acknowledge and accept in writing the recommendations of the student government or other designated entity or notify the student government or other designated entity in writing of any modifications under consideration by the President, including reasons for the proposed modification;

(f) The student government or other designated entity shall have a reasonable time (to be specified in the guidelines and procedures) to consider and respond in writing to modifications proposed by the President. If the student government or other designated entity concurs with the President's proposed modifications, such shall be communicated in writing to the President within the specified time. If no response is received within the specified time, the student government or other designated entity shall be deemed to have concurred in the modifications;

(g) If the student government or other designated entity does not concur, such shall be communicated in writing to the President within the specified time. The President (or designee) shall (within the time specified in the guidelines and procedures) then meet with the representatives of the student government or other designated entity to attempt to reconcile the difference;

(h) If the President and the student government or other designated entity do not reach agreement within ten working days, either party may request a hearing before the Hearings Board. Within five working days of the request for hearing, the Hearings Board shall conduct a hearing and within five working days thereafter shall make written findings of fact and recommendations for resolution of the disagreement and shall provide such findings and recommendations to both parties. Both parties shall notify the Hearings Board and each other promptly (to be specified in the guidelines and procedures) and in writing whether they accept or reject the recommendations of the Hearings Board:



(A) The Hearings Board shall consist of five members, two appointed by the President, two appointed by the student government or other designated entity and one mutually agreed upon. The members shall be selected promptly upon receipt of a request for a hearing. Prior to November 1 of each year, both parties will compile a list of persons mutually acceptable to sit on the Hearings Board. In the event a hearing is requested, the parties shall select the fifth Hearings Board member from this list;

(B) The President and the student government or other designated entity shall be given notice of the time and place of the hearing at least 24 hours before the hearing. All meetings of the Hearings Board shall be open to the public and appropriate notice shall be given;

(C) A representative of the student government or other designated entity and the President (or designee) shall present to members of the Hearings Board relevant information that may include, but is not limited to, memoranda, budget requests, minutes and correspondence.

(4) The recommended amount of the incidental fee for the campus shall be made by the President to the Board. A representative of student government or other designated entity may appeal to the Board the recommendations of the President regarding the amount of the incidental fee or the allocation among the three major categories listed in subsection (3)(c) of this section. Allocations among programs and activities within a major category are not subject to appeal. The Board shall order a timely review of the appeal and shall communicate to the parties involved a decision in writing within a reasonable time.

(5) The President shall recommend to the Board an incidental fee for each institution. Representatives of student government as well as other members of the public may appear in support of, opposition to, or to request modification of the recommended incidental fee in accordance with the provisions of University policy. The Board will concurrently consider appeals of the substantial unresolved differences in the allocation of incidental fees among the three major categories. Except in extraordinary circumstances or upon its own motion, the Board will not consider allocations within a major category.

(6) Within a reasonable time (to be specified in the guidelines and procedures) after final action by the Board, the President shall confer with the student government or other designated entity in making any necessary adjustments in the allocations and shall communicate the final action of the Board and the president in writing to the student government or other designated entity.

Chapter/Volume:  
Responsible Office:

For questions about this policy, please contact the Office of Student Life at 541-346-3216

Original Source:  
Oregon Administrative Rule