



OREGON
HEALTH & SCIENCE
UNIVERSITY

OHSU Board of Directors Meeting

**June 27, 2013
SON – 358/364
1:00 p.m. – 3:00 p.m.**

OREGON HEALTH & SCIENCE UNIVERSITY BOARD OF DIRECTORS MEETING

June 27, 2013
1:00 – 3:00 p.m.
School of Nursing, Rooms 358 & 364

1:00 p.m.	Call to Order/ Chairman's Comments President's Comments Approval of Minutes (Action)	Charles Wilhoite Joe Robertson, M.D. Charles Wilhoite
1:10 p.m.	Proposed FY14 Budget and Academic Tuition & Fee Book (Action) FY13 YTD Results	Lawrence Furnstahl Jeanette Mladenovic, M.D.
1:35 p.m.	Approval of Public Accounting Firm (Action)	Lawrence Furnstahl
1:40 p.m.	State Achievement Compact (Action)	David Robinson, Ph.D.
1:55 p.m.	Addressing Student Debt	Jeanette Mladenovic, M.D.
2:15 p.m.	Strategic Plan for Diversity	Norwood Knight-Richardson, M.D.
2:45 p.m.	Other Business; Adjournment	Charles Wilhoite



Next meeting
Thursday, Sept. 12, 2013
School of Nursing, rooms 358/364
1:00-3:00 p.m.

**Oregon Health & Science University
Board of Directors Meeting
June 27, 2013**

Board Members in Attendance: Charles Wilhoite, Ken Allen, Román Hernández, Poorav Patel, Maria Pope, Joe Robertson, Amy Tykeson, David Yaden

Staff Presenters: Lawrence Furnstahl, David Robinson, Jeanette Mladenovic, Norwood Knight-Richardson

Chair's Comments

Mr. Wilhoite called the meeting to order, welcoming all in attendance and outlining the agenda for the meeting, including discussions and presentations about fiscal year financial results, student tuition costs and the institution's strategic plan for diversity. Mr. Wilhoite recounted attending the Diversity and Inclusion Awards program, a wonderful event recognizing many talented faculty and staff for their diversity related contributions to OHSU. Mr. Wilhoite also participated in the School of Dentistry graduation ceremony describing it as an exciting event that is rewarding for faculty, staff, students and their family members.

President's Comments

Dr. Robertson opened his remarks by identifying student debt and the strategic plan for diversity as critically important topics that pose a particular challenge in Oregon. With the initiatives being launched at OHSU in these areas, he expressed confidence that considerable headway has been made and will continue.

Dr. Robertson commented on recognition that Shoukhrat Mitalipov is receiving for his successfully creating an embryonic stem cell from an ordinary human skin cell, describing it as a truly revolutionary development garnering worldwide recognition. Dr. Robertson commented on the nearly 1200 students who graduated from OHSU this year, and mentioned the anticipated arrival of Susan Bakewell-Sachs as Dean of the School of Nursing, and Phillip Marucha as Dean of the School of Dentistry. Dr. Robertson also welcomed Keith Todd, the new President of the OHSU Foundation and described Mr. Todd's background and qualifications. Finally, he recognized Constance French for her exemplary service as interim President of the OHSU Foundation.

Dr. Robertson recapped OHSU's experience with the legislative session, describing it as extremely successful, with OHSU receiving \$3 million more than the budgeted amount proposed by the governor and with the passage of landmark legislation. Senate Bill 2: Scholars for Healthy Oregon creates opportunity for education at OHSU with zero tuition in exchange for commitments to service after graduation in rural or underserved areas. Bills were passed related to skin cancer prevention, biofuels, telemedicine, credentialing, changing the name of CROET to the Oregon Institute of Occupational Health Sciences, and better defining the dental campus. Dr. Robertson also mentioned passage of the public safety authority bill, conferring on the OHSU Board authority to authorize OHSU police officers to carry firearms. This issue will be brought to the Board for consideration in the fall.

Dr. Robertson announced that AIMS Technology received FDA approval for a device designed to assist the recovery of individuals suffering from stroke, spinal cord injuries, or other neurological injuries. OHSU has a significant commercial interest in this technology and believes that this is a tremendous market opportunity that will bring a financial reward, along with relief for many patients.

Finally, Dr. Robertson reported that Doernbecher Children's Hospital continues to rank among the nation's best children's hospitals, and he mentioned the favorable and improved ranking of many of its pediatric specialties.

Approval of Minutes

Mr. Wilhoite asked for approval of the minutes of the March 21, 2013 Board meeting included in the Board Docket. Upon motion duly made and seconded, the minutes were unanimously approved.

Financial Update

Mr. Furnstahl described the proposed budget, noting that it was reviewed by the Finance and Audit Committee, and that it targets 5% growth in revenue to \$2.2 billion. The budget reflects operating income of \$65 million, funding for \$150 million in annual capital projects plus completion of the Collaborative Life Sciences Building, while maintaining liquidity at or above OHSU's benchmark for A+ credit. Mr. Furnstahl noted that OHSU will begin a transition to a more integrative budget approach with the following major thrusts: (i) focusing on our classic business -- excellent academic health care, attracting and educating top students, and securing grant funding; (ii) implementing more standard operating procedures across the university to increase efficiency; and (iii) partnering with others and investing in the future.

Mr. Furnstahl commented that the key financial challenges for the budget include (i) the national slowing of healthcare spending and the corresponding flattening of our payment rates, (ii) federal sequestration and its impact on research funding, (iii) pension funding, (iv) the costs associated with new facilities that are coming online, and (v) the need to reduce relatively high tuition and student debt loads. The current fiscal year operating budget is \$60 million, but in order to address those challenges in the next two years, OHSU must have operating income of \$90 million and \$110 million respectively. Through cost reduction strategies including a hiring freeze, the FY 13 actual run rate puts OHSU on firm financial foundation to meet those challenges.

Commenting on national trends, Mr. Furnstahl reported that over the last 40 years, national healthcare spending averaged 7-8% increases annually, but only 4% in the last two years, resulting in no payment rate increases and a need for OHSU to increase volume and clinical productivity while holding expenses. The NIH budget nearly doubled in the 1990s, but it has been flat against inflation since 2003 and is now decreasing 8-10% with the federal sequestration. May's grant awards compared to last year are down 10-11%. Reduced grant awards will decrease research income over the next three to four years.

Moving to current operation performance, Mr. Furnstahl reported that operating income through May is \$31 million above budget (including \$7 million in one-time gains.) He noted clinical revenue and cost saving and efficiency efforts that supported that strong performance.

Mr. Furnstahl then discussed measures to meet FY 14 budget targets, including continued growth in patient activity, and greater application of gifts to operations and further cost reductions to offset reductions in grant funding. Patient activity is budgeted to grow at 5.7%. The clinical enterprise is striving to improve labor productivity, targeting the 31st percentile among university teaching hospitals, and the School of Medicine is accelerating the PwC initiatives.

On Mr. Furnstahl's invitation, Dr. Jeannette Mladenovic outlined various education initiatives and priorities including developing better access for students, ongoing integration of the inter-professional curriculum, the development of web portals, and the recruitment of the new deans. Dr. Mladenovic noted that addressing the student debt burden and high tuition and fees remains a priority.

Turning to the research mission, Mr. Furnstahl mentioned efforts to shift from individual grants to program grants, to diversify the portfolio of research grant funding, and to track success rates in securing research funding and faculty research productivity. He also described a \$4 million investment in the next two to three years to support the integration of research across OHSU. Responding to a question from a Board member, Dr. Dorsa explained that the program grants bring more support for infrastructure than do individual grants.

Mr. Furnstahl continued by describing the \$150 million capital budget, of which \$83 million is allocated to the hospital, \$53 million to the rest of the university, including the Knight Cardiovascular Institute and the Knight Cancer Institute, and a final \$14 million of capital funded by research grants. The annual capital budget does not include the Collaborative Life Sciences Building for which we will spend the final \$90 million of our \$205 million share in FY 14.

Referencing the balance sheet, Mr. Furnstahl explained that projections for fiscal year end reflect nearly a 10% increase in net worth due to strong operating performance and the Knight Cardiovascular Institute gift. Responding to a question from Mr. Wilhoite related to the projected operating income for FY14 below actual FY13 operating income,

Mr. Furnstahl explained that the operating income is higher this year in part due to one-time revenues, but largely because of efforts across the university to increase baseline performance in advance of next year's financial challenges.

Mr. Furnstahl outlined capital projects for FY14 -- replacing the three decade old telephone system, adding a new data center, funding the first year of capital in the Knight Cardiovascular Institute, replacing a chiller servicing the north side of campus, funding additional hospital beds and certain add high tech and imaging resources, and funding certain facilities and equipment replacement strategies.

Mr. Furnstahl summarized the key focus areas for the upcoming fiscal year -- hospital capacity and throughput, managing growth in patient activity to offset the lack of rate growth in payments, scaling the research enterprise to match the lower levels of federal grant spending, completing the productivity redesign effort, implementing the Knight Cardiovascular Institute business plan, and opening the Collaborative Life Sciences Building. A continuing challenge for the coming year is the uncertainty with the federal budget, the source of 40% of OHSU's revenue. He concluded by noting that belt-tightening measures taken in this past year have helped position the institution to weather this uncertainty.

Mr. Wilhoite asked for approval of Resolution 2013-06-01, adopting the FY 2013-14 Operating Budget and Capital Budget. Upon motion duly made and seconded, the resolution was unanimously approved.

Auditor Approval

Mr. Furnstahl recounted that KPMG has presented a plan for auditing the FY13 financial statements, FY13 being the sixth year of KPMG's performing those services for OHSU. The members of the Finance and Audit committee concluded that 7 years reflects an appropriate cycle to allow continuity and periodic testing of the market for auditors. Mr. Furnstahl recommended continuing with KPMG this year as they have done excellent work, charging reasonable rates, including keeping next year's fees at the current rate.

Mr. Wilhoite asked for approval of Resolution 2013-06-02, selecting and approving KPMG as the OHSU auditor for FY14. Upon motion duly made and seconded, the resolution was unanimously approved.

State Achievement Compact

At Mr. Wilhoite's invitation, Dr. David Robinson discussed the OHSU 2013 Achievement Compact. He provided background for the creation of the Oregon Education Investment Board (OEIB), for Compact 40-40-20 and for Senate Bills 909 and 1581, the latter Bill requiring the governing body of each educational entity to enter into an achievement compact with the OEIB for the upcoming fiscal year. The intent of establishing the achievement compacts is to set targets for statewide goals, report on the progress toward these goals, and to ultimately inform future decisions by the State regarding education.

OHSU's Achievement Compact has 5 components, most related to performance metrics that OHSU has been measuring so that new reporting requirements are not necessary. Outcomes to be measured include the number and percentage of students who are Oregonians that are admitted to the Schools of Medicine, Dentistry, and Nursing respectively; the total number of graduate degrees and certificates awarded in the School of Nursing; and the total number of healthcare professional degrees and certificates awarded. Responding to questions from Board members, Dr. Robinson said that the Achievement Compact percentages do not present challenges relative to the targeted diversity and inclusion plans, and do not include tracking related to where students practice upon graduation.

Mr. Wilhoite asked for approval of Resolution 2013-06-03, approving the Achievement Compact with the Oregon Education Investment Board. Upon motion duly made and seconded, the resolution was unanimously approved.

Addressing Student Debt

Dr. Mladenovic began her remarks by calling the Board's attention to copies of *The State of Our Health*, provided for the Board, noting that the publication was a part of the efforts in connection with the development of the School of Public

Health. She then described efforts by the institution to help students manage debt and to address OHSU's tuition costs which are third highest among public medical schools, in the upper third among public dental schools, and higher than in Washington for a BS in nursing. Referencing materials circulated to the Board, she commented on OHSU student debt for various OHSU programs, emphasizing that while some students incur no debt, a large percentage of School of Medicine and School of Dentistry students graduate with over \$200,000 in debt. Steps by OHSU to address this issue include (i) keeping the cost of medical and dental insurance flat for students, (ii) flattening the fee structure, (iii) limiting the tuition increase in the School of Medicine to 4%, (iv) pursuing efforts intended to reduce costs over time, such as streamlining central support services and utilizing a uniform academic calendar, and (v) requiring debt counseling for students who take on debt. She also described OHSU's financial counseling activities.

Dr. Mladenovic described other initiatives to address the debt issue including handling scholarships (now referred to as grant-in-aid) via a single application process, providing more grant-in-aid money to students, timing the grant-in-aid for optimal advantage to students, and grant-in-aid focused on diversity. She also described Senate Bill 2: Oregon Healthy Scholars -- which will direct \$2.5 million to approximately 21 Oregonians who in exchange for full tuition for the dental, medical, graduate, nursing, and physician assistant programs, commit to serve in rural or underserved areas, upon graduation. She also described OHSU's tuition commitment that students in clinical programs will have no tuition increase during the duration of their program, a commitment designed to help manage student debt.

In response to Board questions, Dr. Mladenovic commented on the relationship of the K-12 pipeline programs and Senate Bill 2, she discussed the rate of increases in tuition at OHSU relative to other schools, and she and Dr. Robertson commented on the significance of student debt on the workforce. The debt load affects the types of students that are recruited more than the ultimate distribution of the workforce. To attract health care workforce members to rural areas, those areas must have educational facilities for family members and employment opportunities for spouses.

Mr. Wilhoite expressed appreciation for the efforts and focus on this significant issue and noted that OHSU should be proud of the quality of education and the value of the degree that students receive.

Diversity and Inclusion Plan

Dr. Norwood Knight-Richardson acknowledged Leslie Garcia, Michael Tom, and their staff for efforts in developing the Diversity Action Plan. The plan was constructed around OHSU's Vision 2020 and is intended to accomplish a cultural transformation such that the institution not only values diversity but "lives" it. Dr. Knight-Richardson discussed the definition of diversity, the business case for diversity, the guiding principles for success in efforts to drive diversity and inclusion, and the vision of the Diversity Action Plan.

He outlined the five goals of the Diversity Action Plan -- to increase recruitment, strengthen retention, improve the climate of inclusion, build community partnerships, and create a benchmark for excellence -- noting that each goal has associated strategies and quantifiable metrics. Each mission will choose which goal(s) to emphasize, while pursuing all goals. A campus-wide assessment will be conducted this fall to measure progress against goals. Measuring progress will involve a self-evaluation, benchmarking against peer and notable institutions, and benchmarking against accepted standards created by organizations around the world. Responding to questions from Mr. Patel, Dr. Knight-Richardson explained that the diversity of outside vendors engaged by OHSU is identified when possible and that diversity related criteria are included in OHSU selection processes following the issuance of RFPs.

Discussion followed with the Board, Dr. Knight Richardson and Dr. Mladenovic regarding diversity related recruitment efforts for students and faculty, the challenges for OHSU given the competition with other institutions for candidates, training for Search Committees and Admissions Committees and ensuring that as a part of the retention goal, opportunities exist for candidates to senior leadership positions.


Mr. Wilhoite commended Dr. Knight-Richardson on his efforts and noted that he has seen positive results in a relatively short period of time. He cited the upward trend in OHSU minority and underrepresented minority enrollment as a positive development, noting that the Board wants to see advancement in diversity relative to students and faculty and to all parts of the institution. Mr. Wilhoite commented that as the largest employer in the city of

Portland, OHSU has a responsibility to present the best and most inclusive employment environment, and that the Board and the Executive Leadership Team are 100% committed to this plan and to the dedication of necessary resources to achieve the stated goals. This must be a long-term objective since the Pacific Northwest is not a diverse region, but results will be achieved if diversity remains a focused objective. Mr. Wilhoite recognized the efforts of Michael Tom and Leslie Garcia. Mr. Yaden encouraged the institution to work closely with the Oregon University System to identify students in middle school and create a motivational and financial pipeline for them.

Adjournment

Hearing no further business, Mr. Wilhoite adjourned the meeting at 3pm.

Respectfully submitted,



Amy M. Wayson
Board Secretary



Proposed FY14 Budget

**OHSU Board of Directors
June 27, 2013**

FY14 Budget: Table of Contents

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4) Proposed FY14 operating budget & tuition	37 – 77
5) Proposed FY14 capital budget & balance sheet	78 – 89

Introduction & Overview

- This document presents the proposed FY14 operating and capital budget for Oregon Health & Science University, within the context of national trends in health care and research funding, as well as this year's results through May.
- After review last week at the Finance & Audit Committee, we will propose the budget for approval at the June 27th meeting of the Board of Directors.
- In summary, the budget targets 5% growth in revenues to \$2.2 billion, yielding \$65 million in operating income, funding \$150 million in annual capital projects plus completion of the Collaborative Life Sciences Building, while maintaining liquidity at or above OHSU's benchmark for A+ credits.
- It also begins a transition to a more integrative budget approach, focused on:
 - Classic academic health care done very well (tertiary/quaternary care, NIH grants, training the best students)
 - “Standard operating procedures” to reduce variation and increase effectiveness
 - Partnering and investing for the future: population health and non-governmental support of science.

Budget Advances Vision 2020

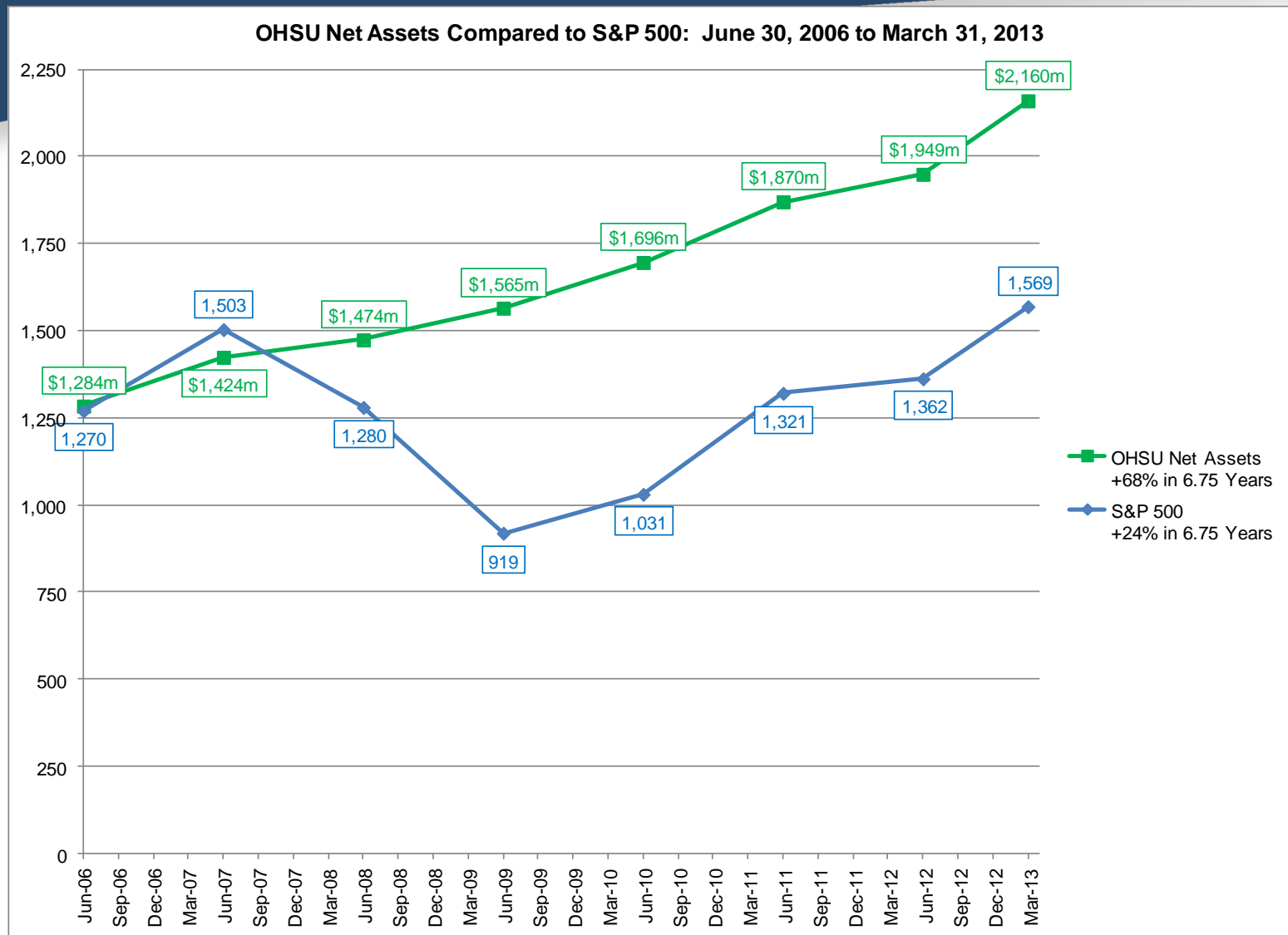
OHSU will partner to make Oregon a national leader in health and science innovation for the purpose of improving the health and well-being of all Oregonians.

Best predictor of future success is past performance.

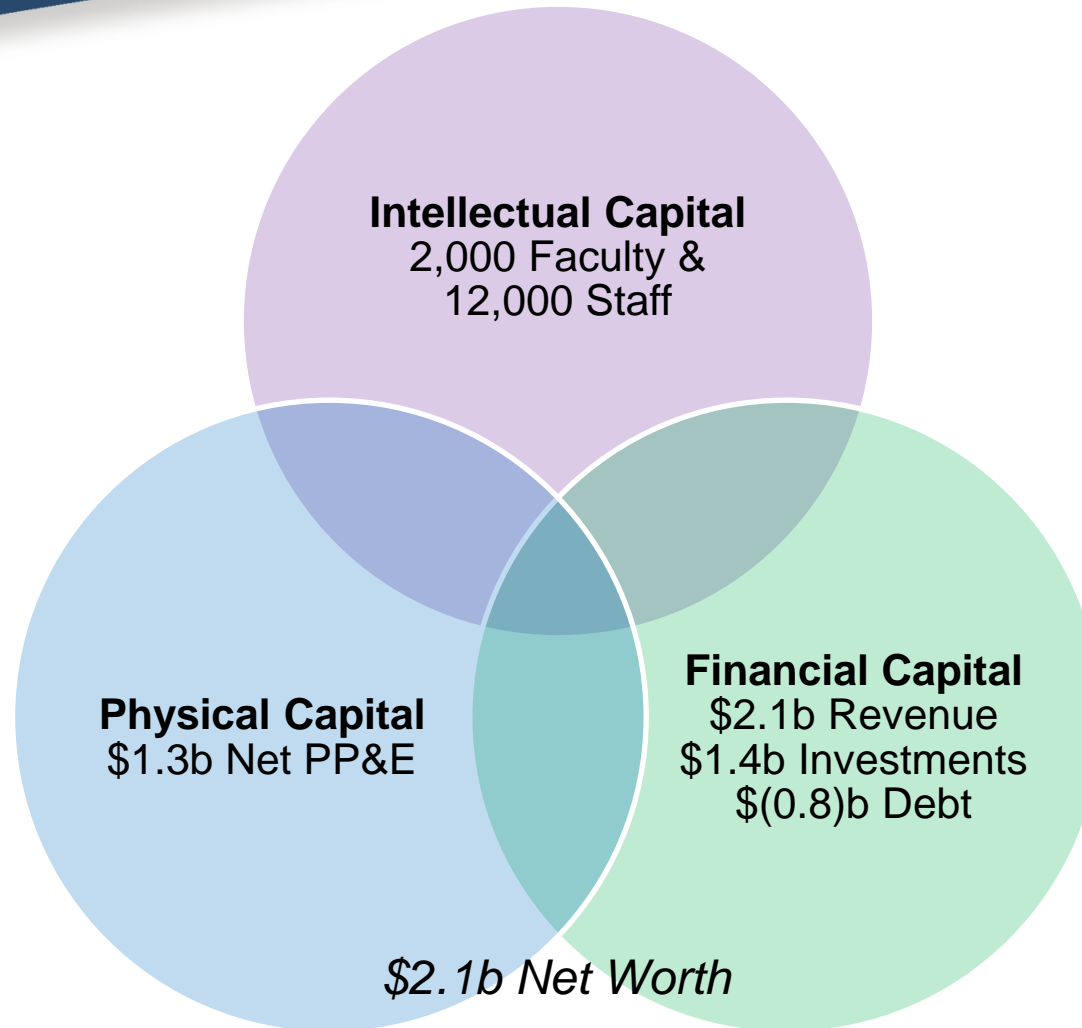
OHSU's Asset / Liability Allocation

- In light of the current challenges and uncertainties in the environment—including health care reform, federal sequestration, and pension pressures—it is worth recalling OHSU's success in managing through the difficult economy of the past several years.
- As the next page shows, OHSU's net worth—the broadest measure of financial strength—has increased steadily over the past 6.75 years, rising 68% when the S&P 500 is up a net of 24% (after plunging in 2008 – 2009).
- At the core of OHSU's strategy is recruiting, advancing and deploying the best faculty.
- We “monetize” the value of our faculty largely in two ways: through a growing and very well managed clinical enterprise, and through philanthropy, including five gifts from \$25 million to \$125 million.
- This strategy is reflected in the aggregate “asset / liability” allocation of OHSU's balance sheet, which is half invested in “equity-like” assets (stocks and other equity investments in the Foundation endowment plus the physical plant of the hospital) and half in “mission-supporting” assets (such as research labs and classrooms) that attract and support the best faculty, with very little net in “fixed income” assets.

OHSU Net Worth Up 68% Over 6.75 Years



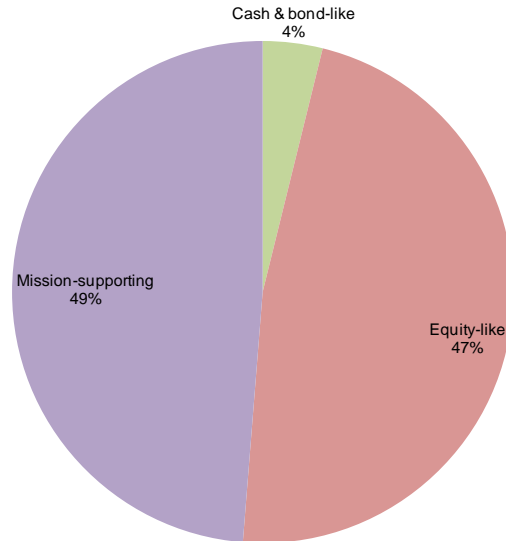
University Advantage: Intellectual Capital



*FY13 YTD with
Foundations
consolidated*

Consolidated Asset / Liability Allocation

Consolidated OHSU Asset & Liability Allocation
June 30, 2012 Net Assets = \$1,949m

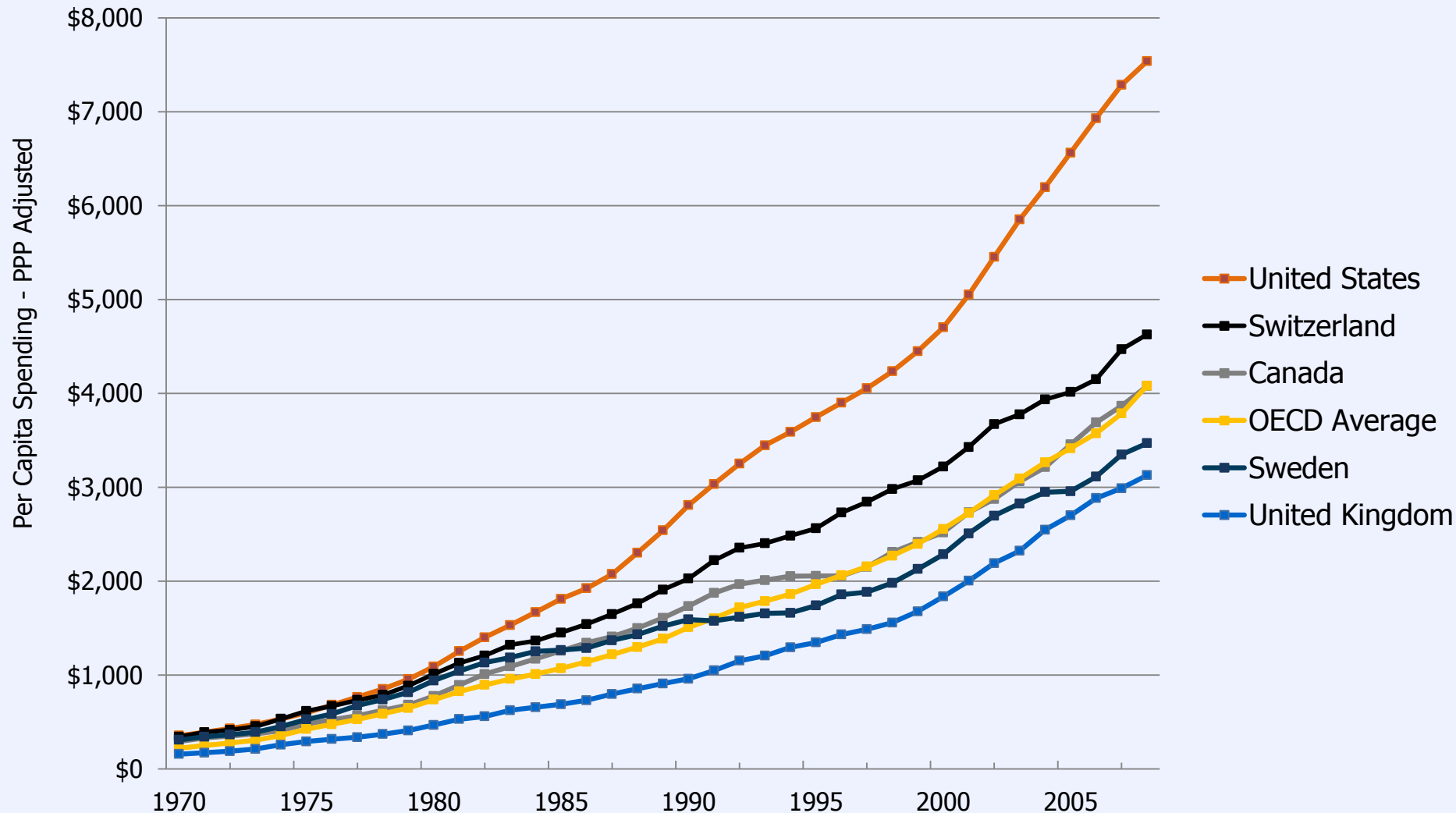


June 30, 2012 (millions)	Cash & Investments	Physical Plant	Long-Term Debt	Other Net Assets	Consolidated OHSU	Percent of Total
Cash-like	\$338	\$0	\$(194)	\$0	\$144	7%
Bond-like	538	0	(607)	0	(69)	-4%
Equity-like	395	529	0	0	924	47%
Mission-supporting	130	753	0	67	950	49%
Total net worth	\$1,401	\$1,282	\$(801)	\$67	\$1,949	100%

Big Picture: Healthcare within US GDP

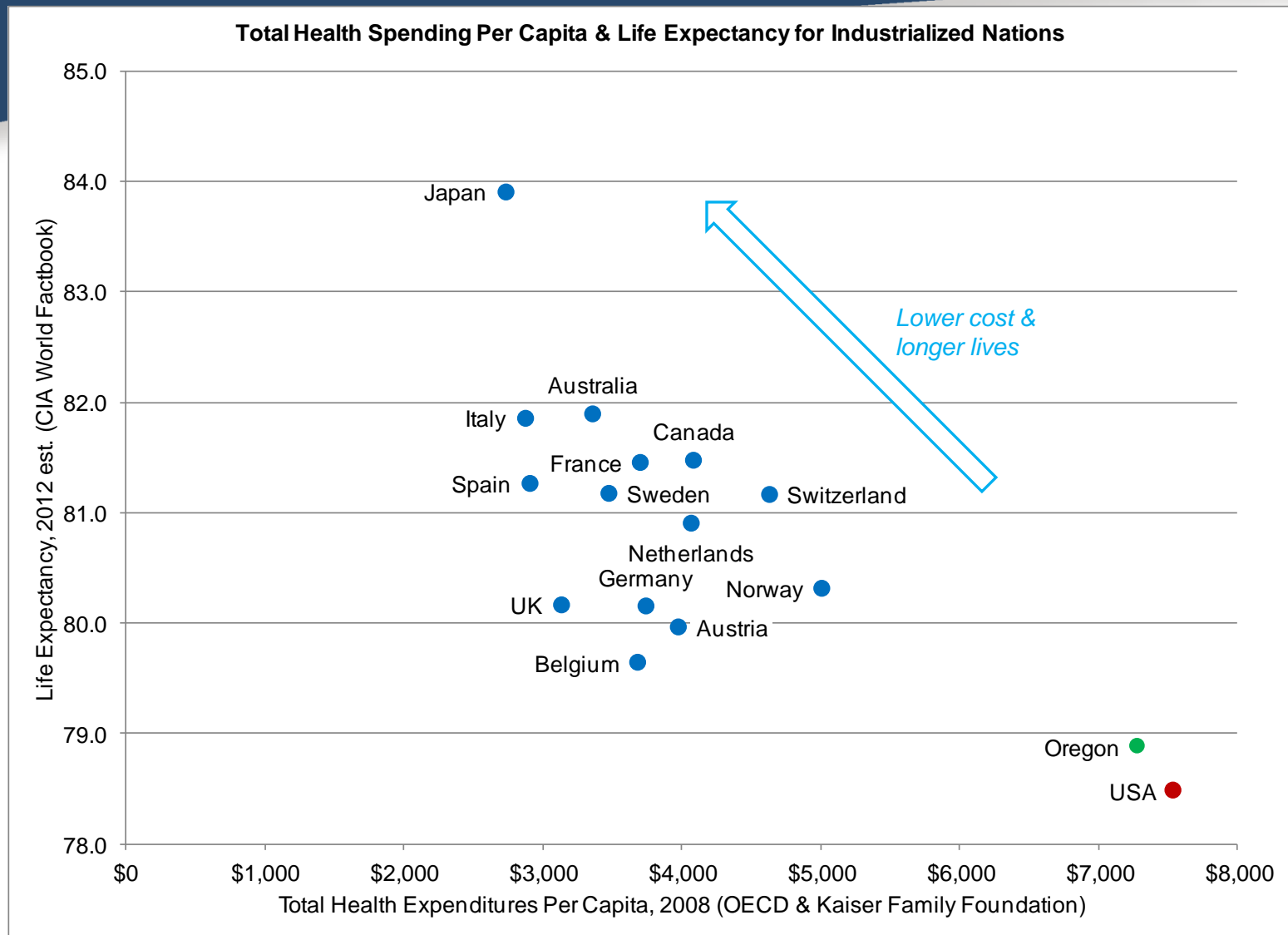
	<u>US GDP</u>	<u>US Healthcare</u>	<u>OHSU</u>
Last 25 Years (1985 – 2010)	1.0% population 2.5% inflation <u>1.5% real income</u> 5.0% GDP growth	<i>10% GDP to 17% GDP</i> 7.5% growth	\$190m in 1985 \$1.9b in 2010 9.5% growth
<i>Current Scale</i>	<i>~\$15 trillion</i>	<i>~\$2.5 trillion</i>	<i>~\$2 billion</i>
<i>Next 25 Years</i>	<i>Slower GDP growth</i>	<i>Bend the curve -2% points</i>	

Growth in Total Health Expenditure Per Capita, U.S. and Selected Countries, 1970-2008

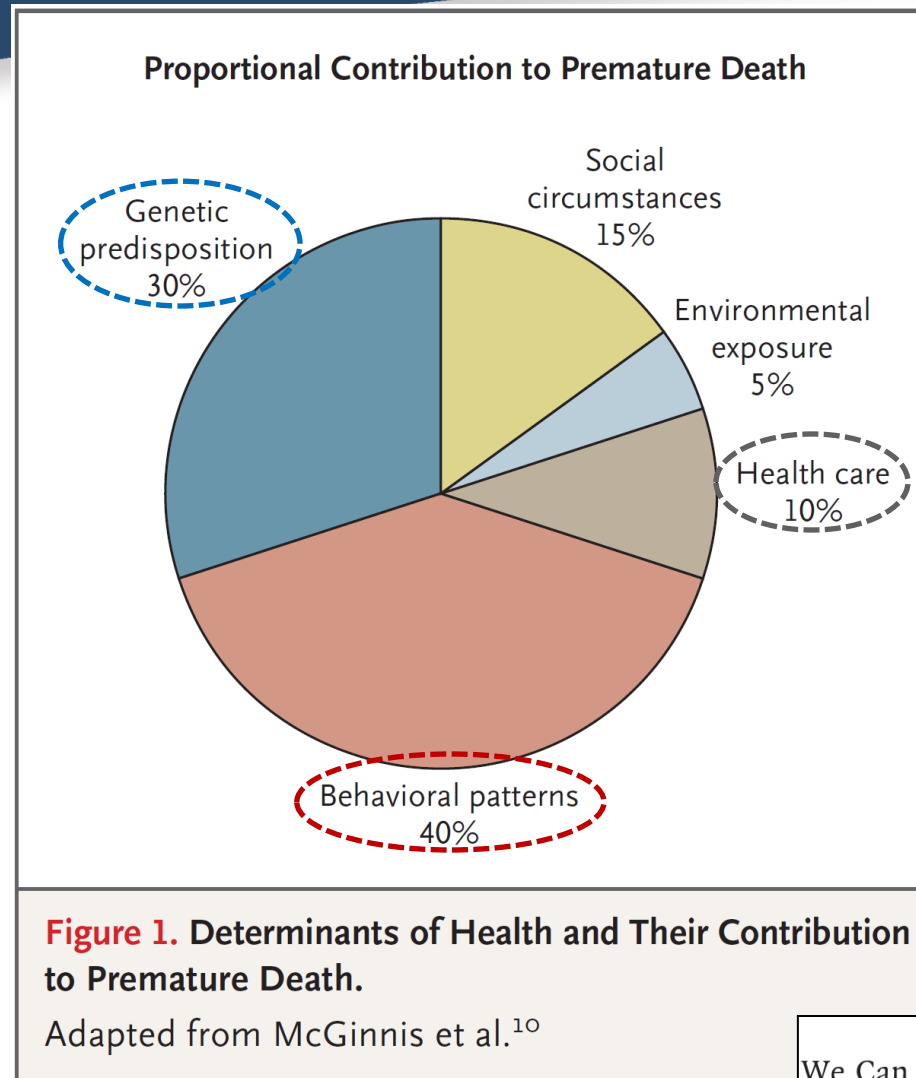


Source: Organisation for Economic Co-operation and Development (2010), "OECD Health Data", *OECD Health Statistics* (database).
doi: [10.1787/data-00350-en](https://doi.org/10.1787/data-00350-en) (Accessed on 14 February 2011).

Spending vs. Life Expectancy by Country

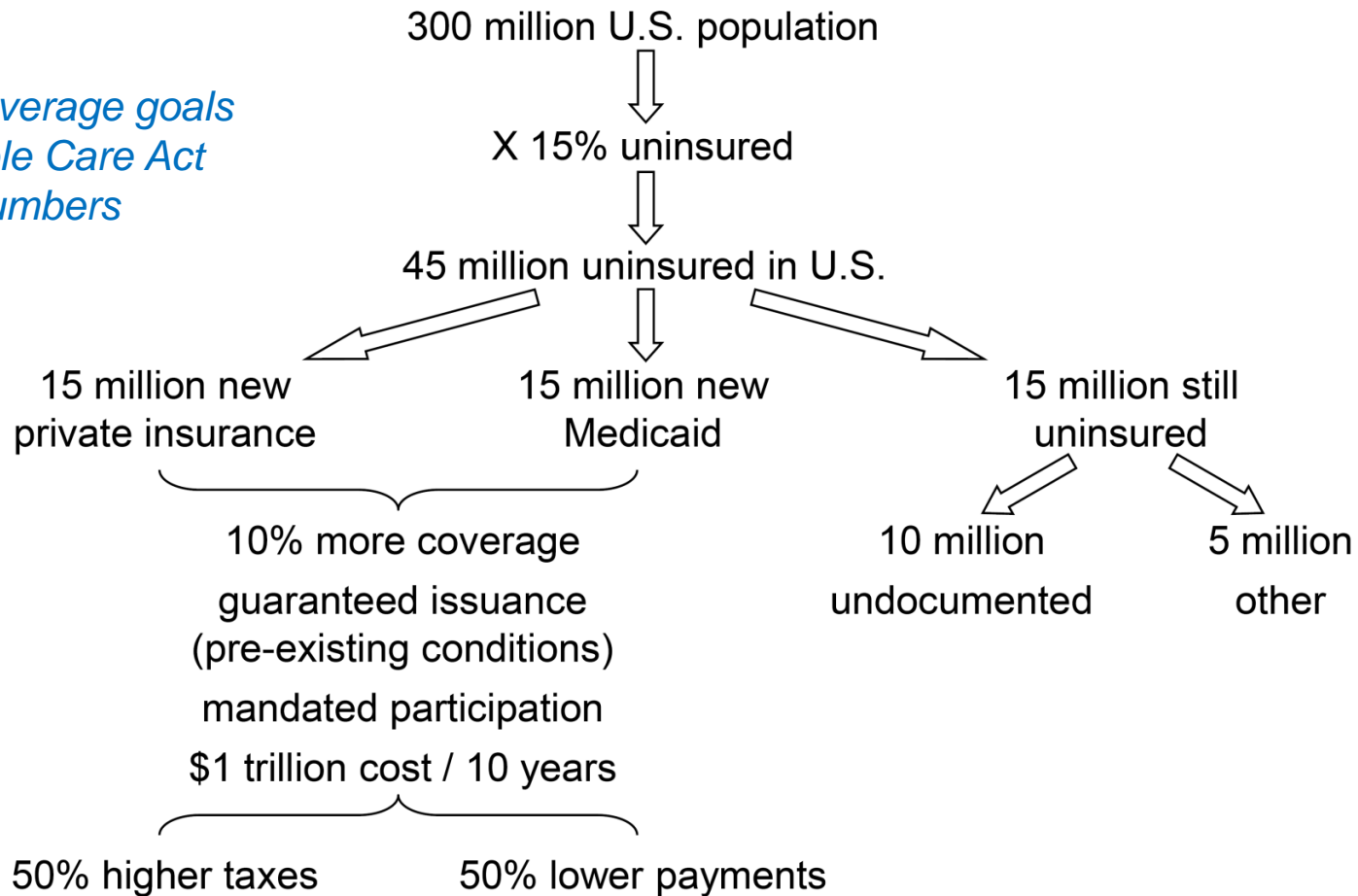


Factors Contributing to Premature Death

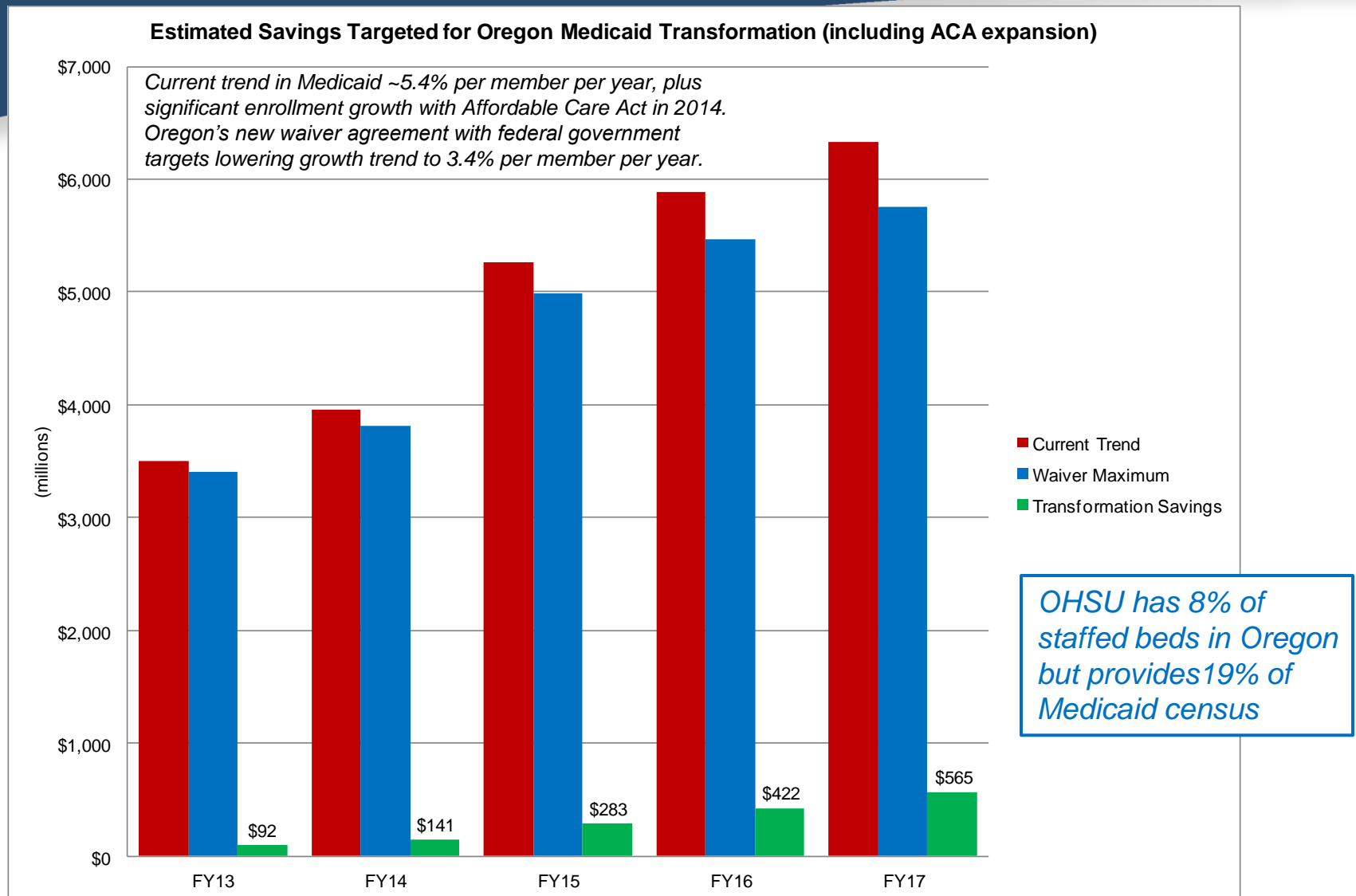


Increasing Coverage: Affordable Care Act

*Original coverage goals
of Affordable Care Act
in round numbers*



Bending The Curve: Oregon Medicaid Targets



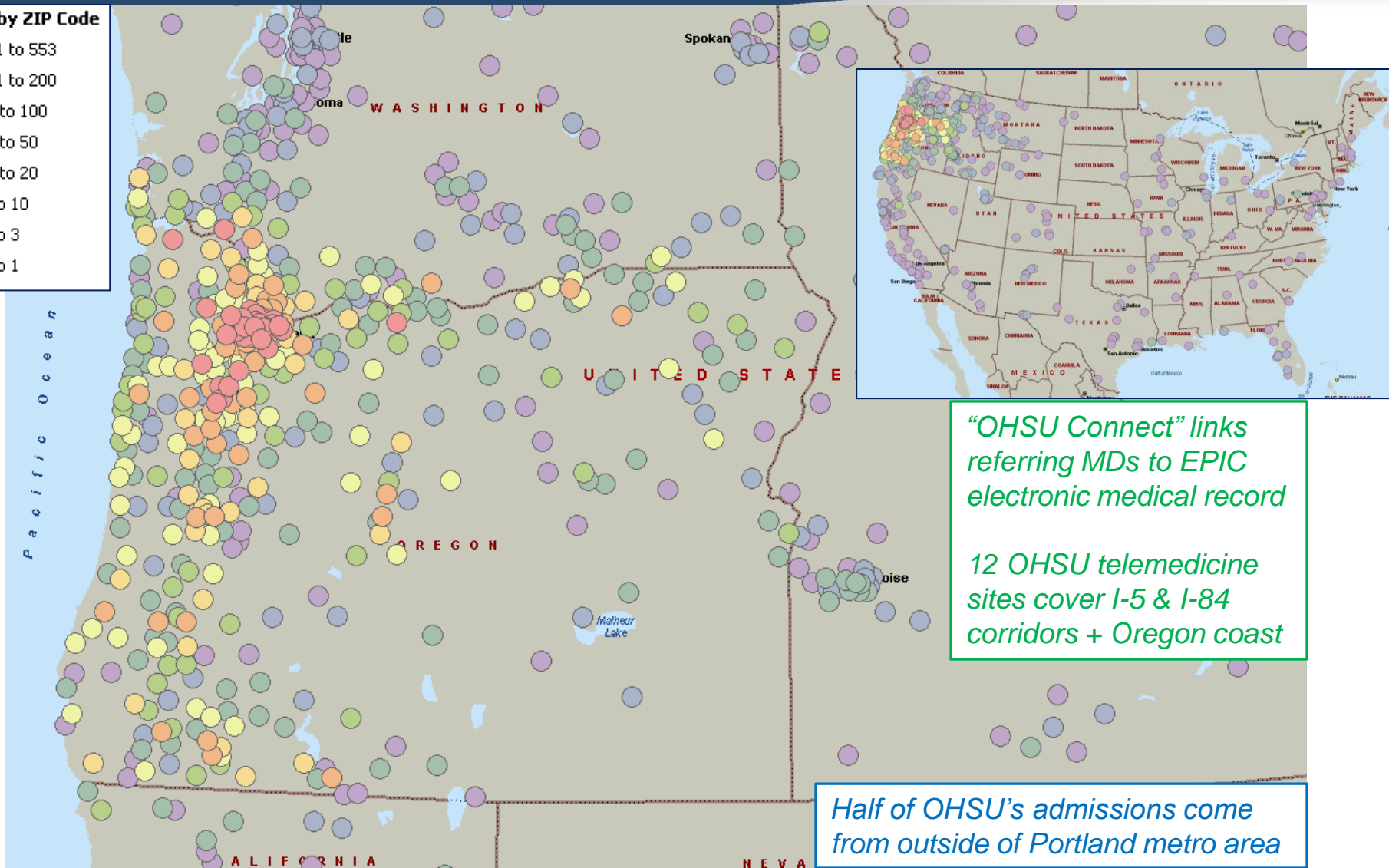
Distribution of US Health Care Spending

US GDP	\$15 trillion
Health care %	x 17%
<hr/>	
US health care spending	\$2.5 trillion
US population	/ 300 million
<hr/>	
Health care / person	\$8,000

50% population	5% spending	\$800 / person
45% population	45% spending	\$8,000 / person
5% population	50% spending	\$80,000 / person

Health care needs strategies for each segment

OHSU's Patients Span Oregon & Beyond

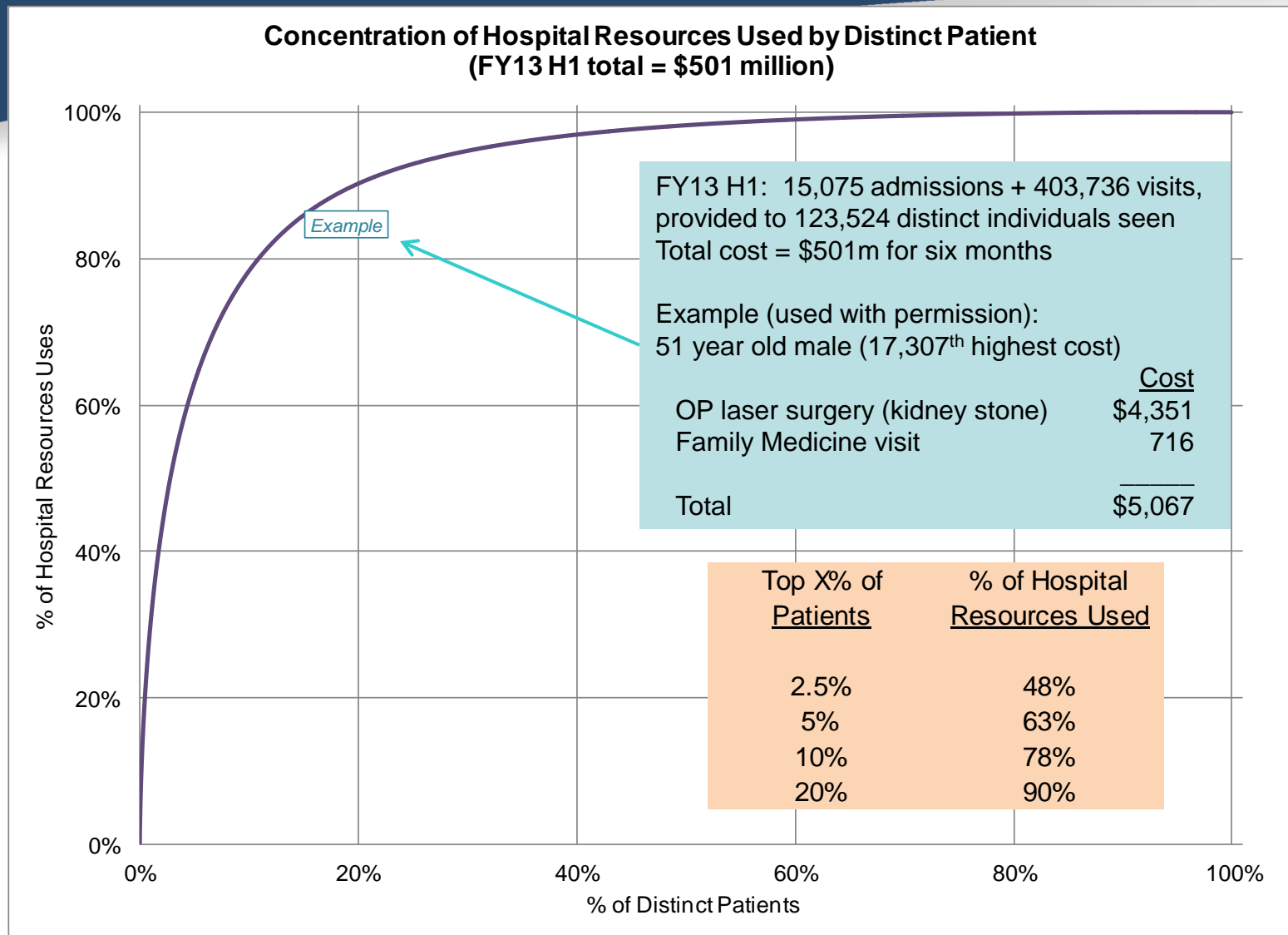


“OHSU Connect” links referring MDs to EPIC electronic medical record

12 OHSU telemedicine sites cover I-5 & I-84 corridors + Oregon coast

Half of OHSU's admissions come from outside of Portland metro area

5% of OHSU Patients → 63% of Hospital Cost



Attributes of Coordinated Care Models

1. Best practices to manage and coordinate care

- Single point of accountability
- Patient and family-centered care
- Team-based care across disciplines
- Plans for managing care for 20% of population driving 80% of costs
- Plans for prevention & wellness, including addressing disparities among populations
- Broad adoption and use of electronic health records

2. Sharing responsibility for health

- Shared decision-making for care among patients and providers
- Consumer / patient education and accountability strategies
- Consumer / patient responsibility for personal health behaviors

3. Measuring performance

- Demonstrated understanding of population served
- Quality, cost and access metrics
- Strategies for targets and improvement

4. Paying for outcomes and health

- Payments aligned to outcomes not volume
- Incentives for prevention and improved care of chronic illness

5. Providing information

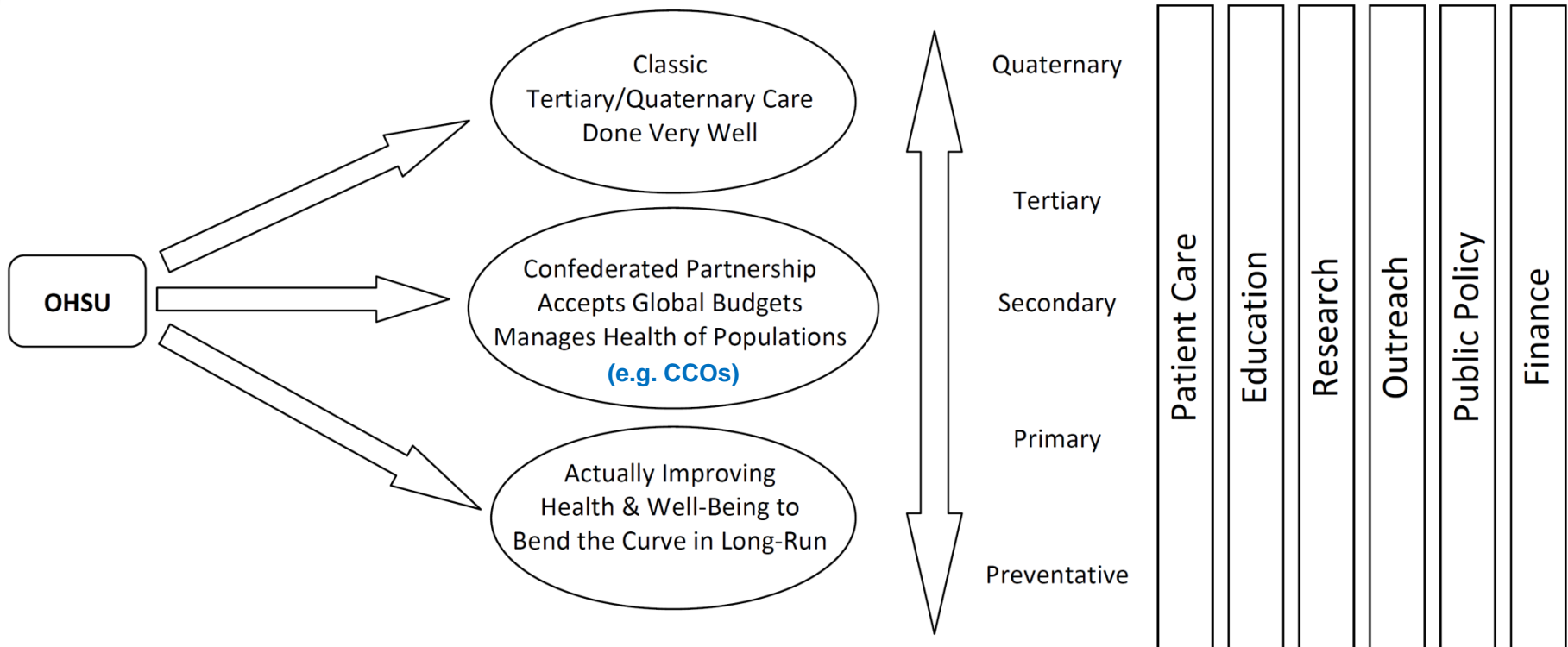
- Readily available, accurate, reliable and understandable cost and quality data
- Price and value for payers, providers and patients

6. Sustainable rate of growth

- Focused on preventing cost shift to employers, individuals and families
- Reduced utilization and cost trend

[Oregon Health Policy Board]

Schematic of OHSU's Roles in Health Reform



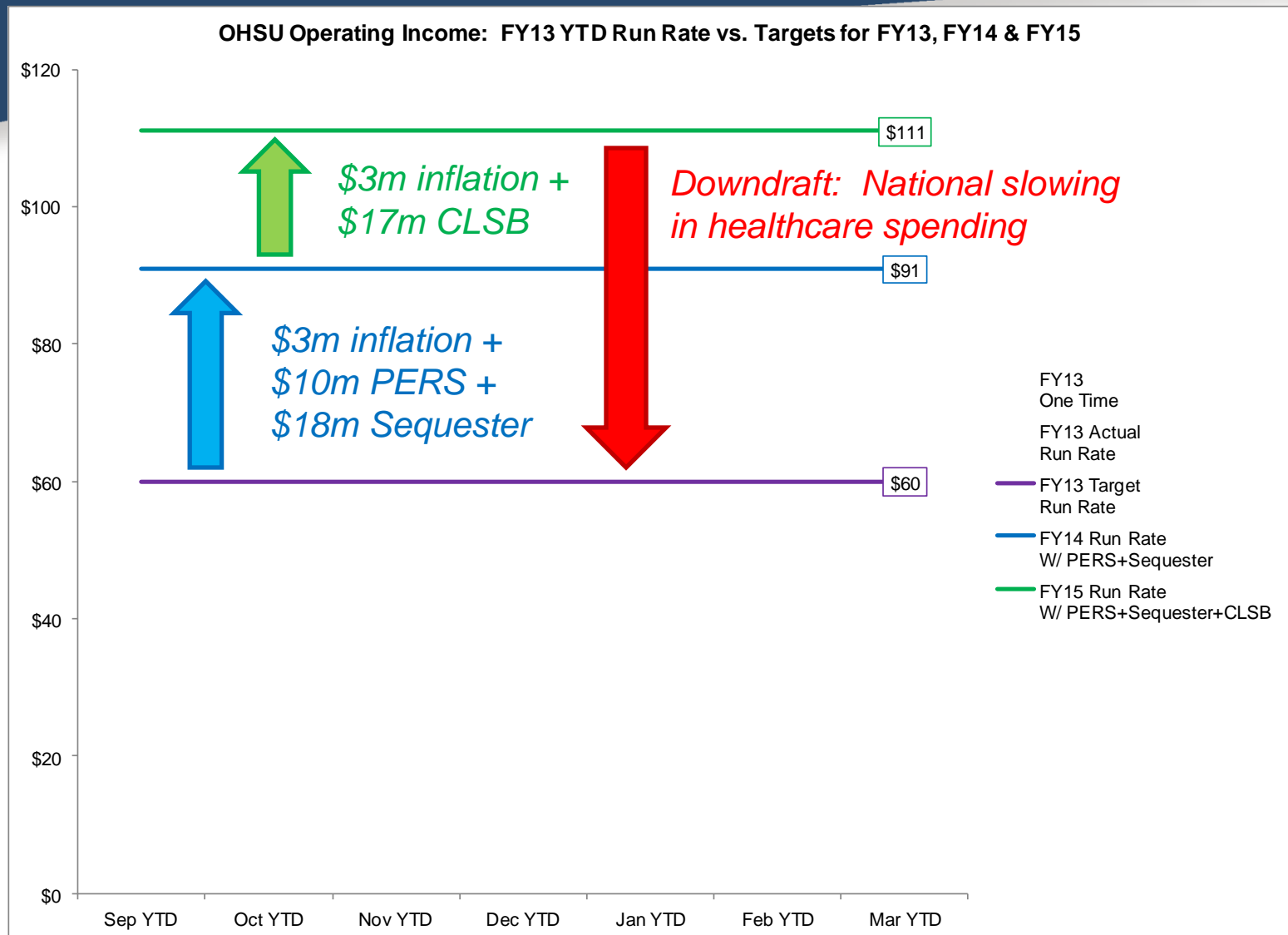
Key Financial Challenges in FY14 – FY15

- OHSU's budget calls for operating income of \$60 million in FY13, rising at least \$3 million per year.
- Adding back depreciation and investment income, this funds principal repayment plus an FY13 annual capital budget of \$136 million (also rising with income each year) to maintain our physical plant and technology infrastructure, and invest in programs.
- Year-to-date operating income is well above budget, and OHSU's balance sheet is stronger than ever.
- However, there are a number of significant challenges increasingly apparent right below the surface of these positive results—directly connected with national trends—which are led us to apply the brakes on hiring and spending in March.
- We are also operating in a period of unprecedented uncertainty, especially in federal funding and policy. For example, the House budget cuts discretionary spending \$17 billion or 2% below the sequester level, and shifts away from domestic to defense spending, while the Senate budget increases spending by \$74 billion or 7.5%.

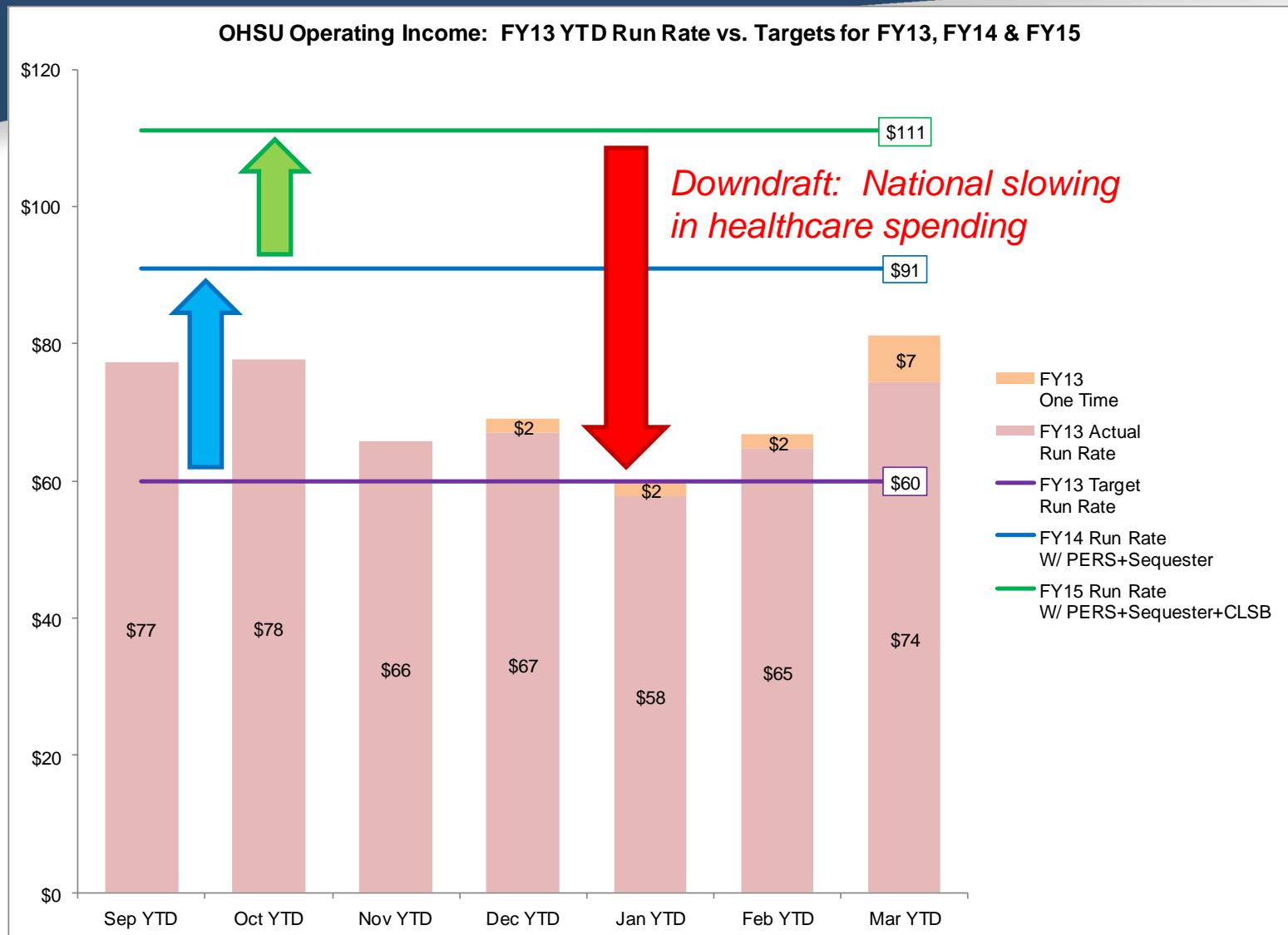
Key Financial Challenges (continued)

- National slowing of health care spending, flattening OHSU's payment rates
 - Managing and improving health & well-being of populations
 - Within fixed global budgets rising at slower than historical trend
- Federal sequestration and outlook for research funding
 - 2% cut to Medicare (about \$7 million)
 - 8% cut to NIH and other federal programs (about \$21 – 23 million gross, with about half falling to bottom line)
- Pension funding: PERS expense currently estimated at +\$10 million in FY14, with significant uncertainty
- Needed new facilities: CLSB interest, depreciation, operations & maintenance estimated at +\$17 million in FY15
- OHSU tuition and student debt loads are high, and State general funds limited

Operating Income Targets: FY13 – FY15

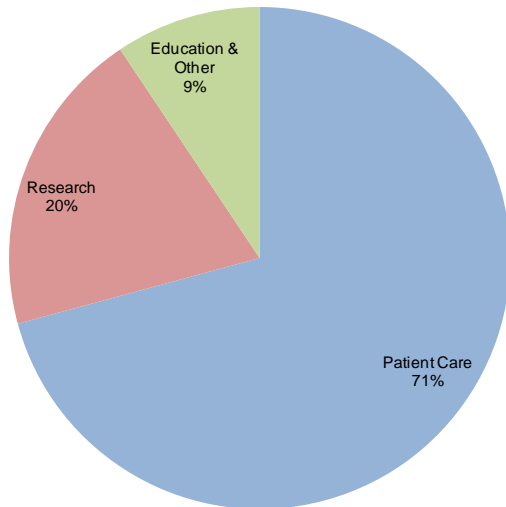


FY13 YTD Income Run Rate vs. Targets

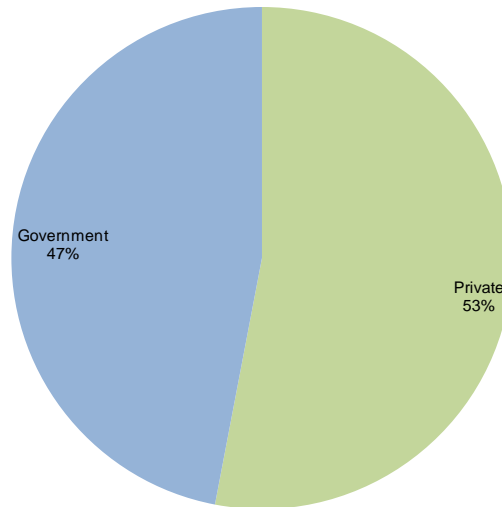


Distribution of Revenue & Expense by Type

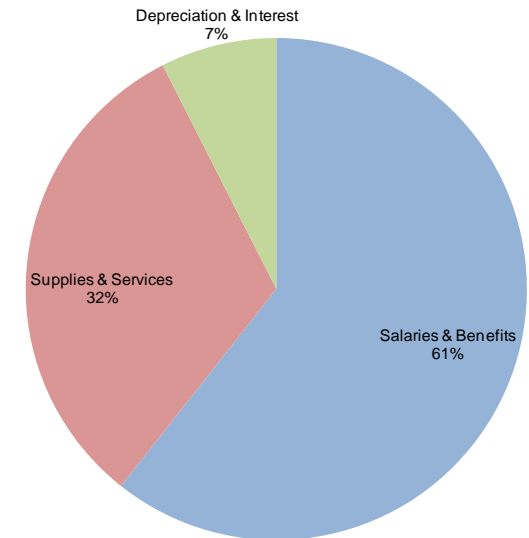
FY12 Revenue by Type
(total = \$2,036m)



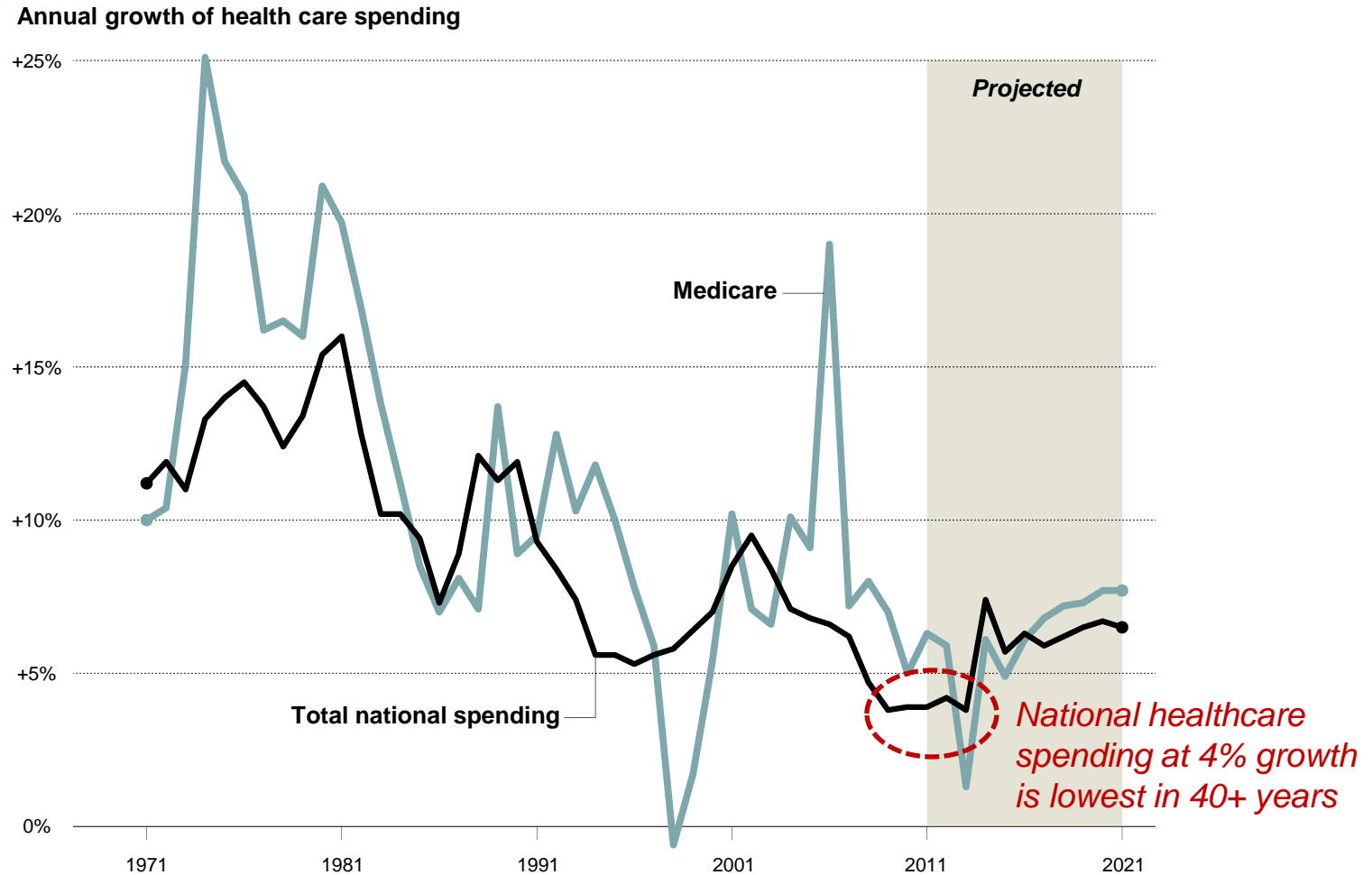
FY12 Revenue by Funding Source
(total = \$2,036m)



FY12 Expense by Type
(total = \$1,953m)

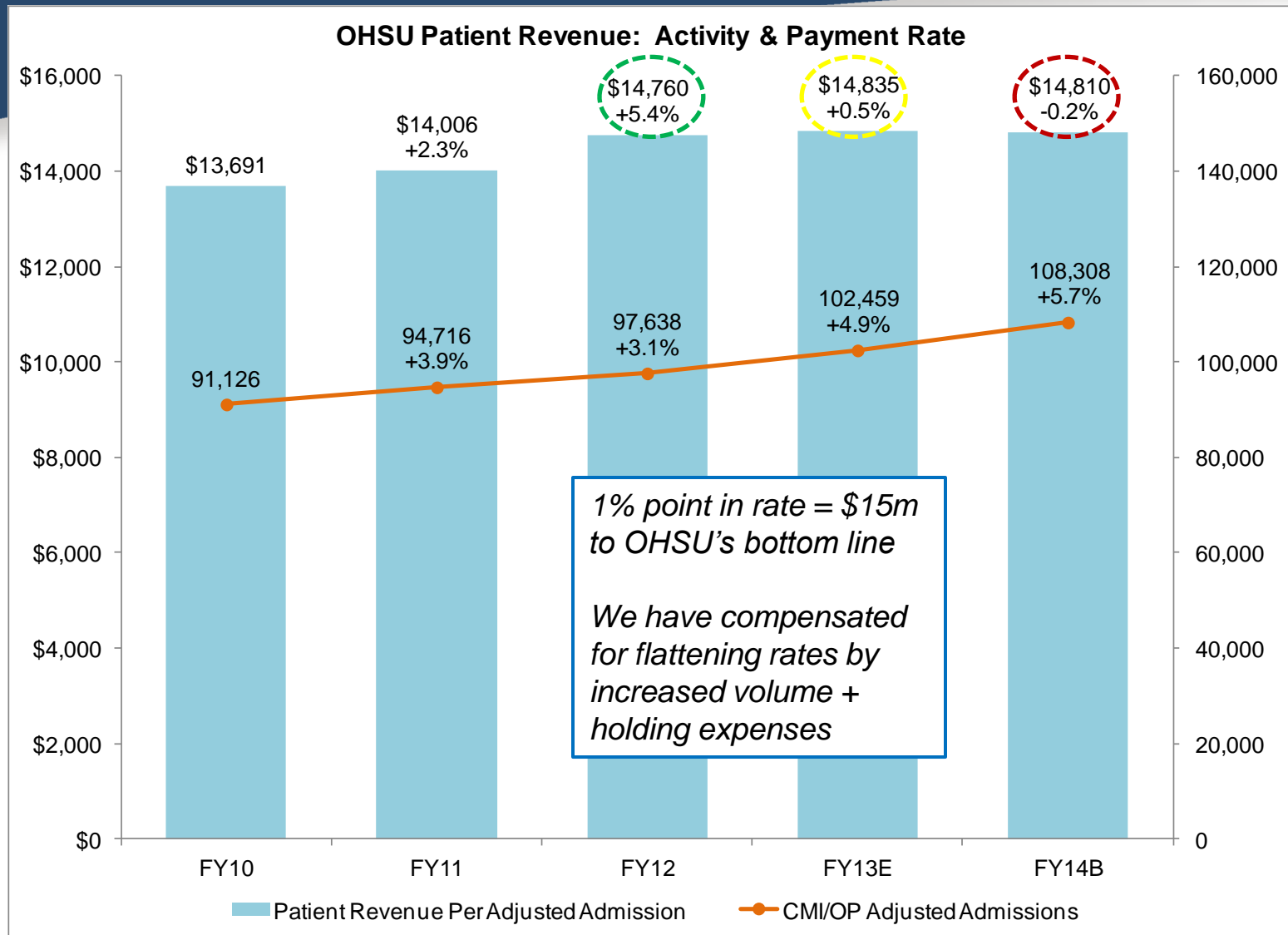


Healthcare Spending Slows Nationally



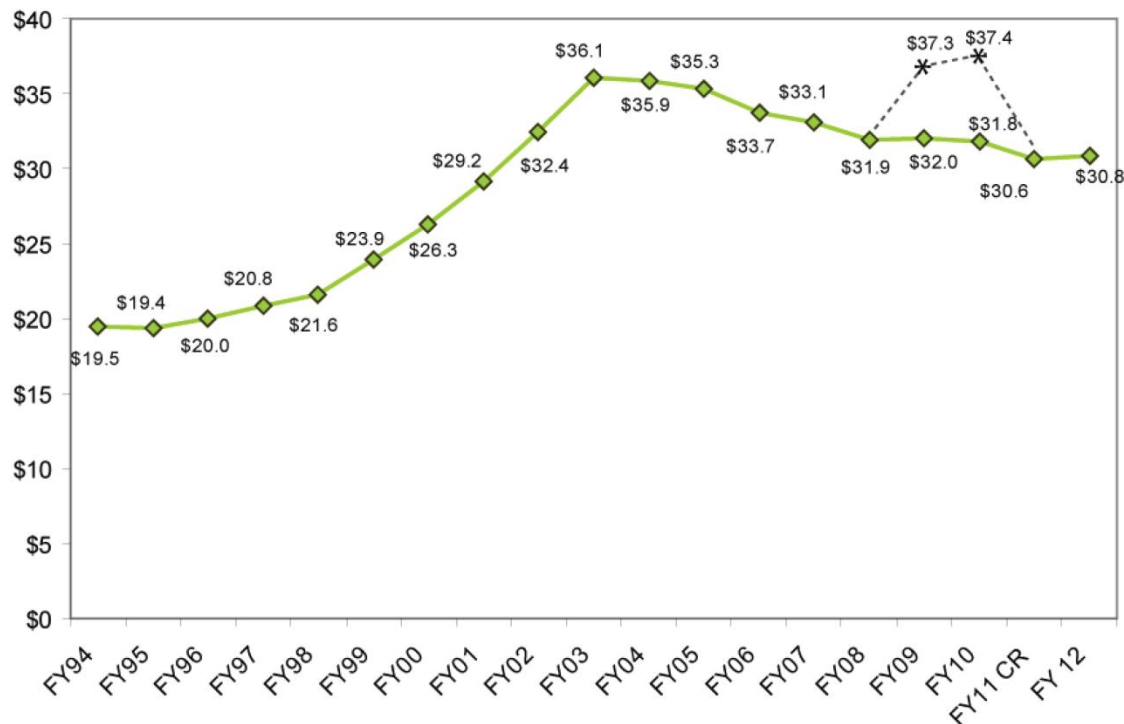
Source: Centers for Medicare and Medicaid Services,
published in New York Times on 2/26/13

Patient Revenue: OHSU Rates Flattening



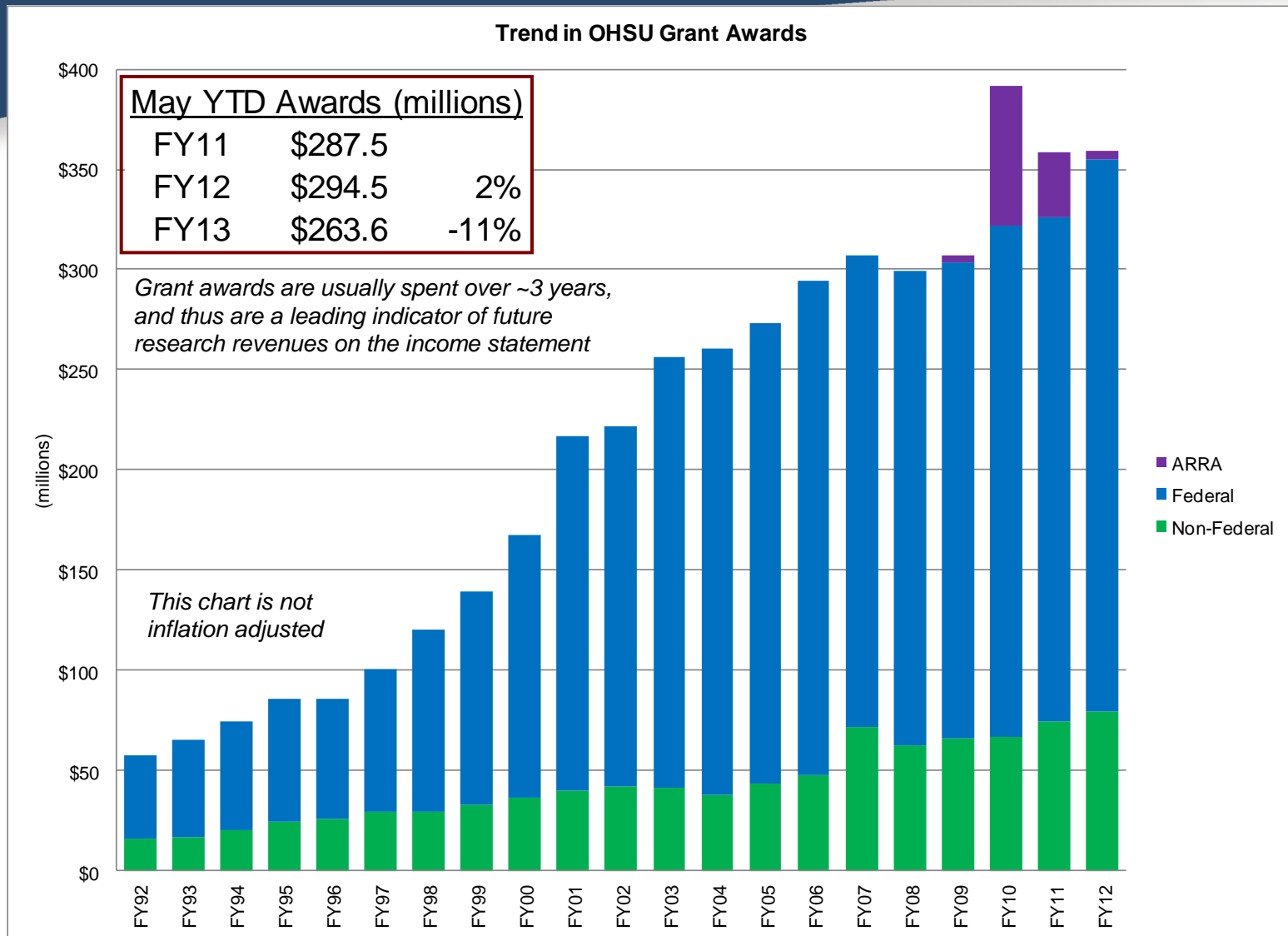
NIH Funding Down in Real Terms Since 2003

Figure 2. NIH Funding in Constant Dollars, FY1994-FY2011 CR and FY2012 Request
Purchasing Power in 2011 Dollars Using Biomedical R&D Price Index (BRDPI), Program Level
(\$ in billions)

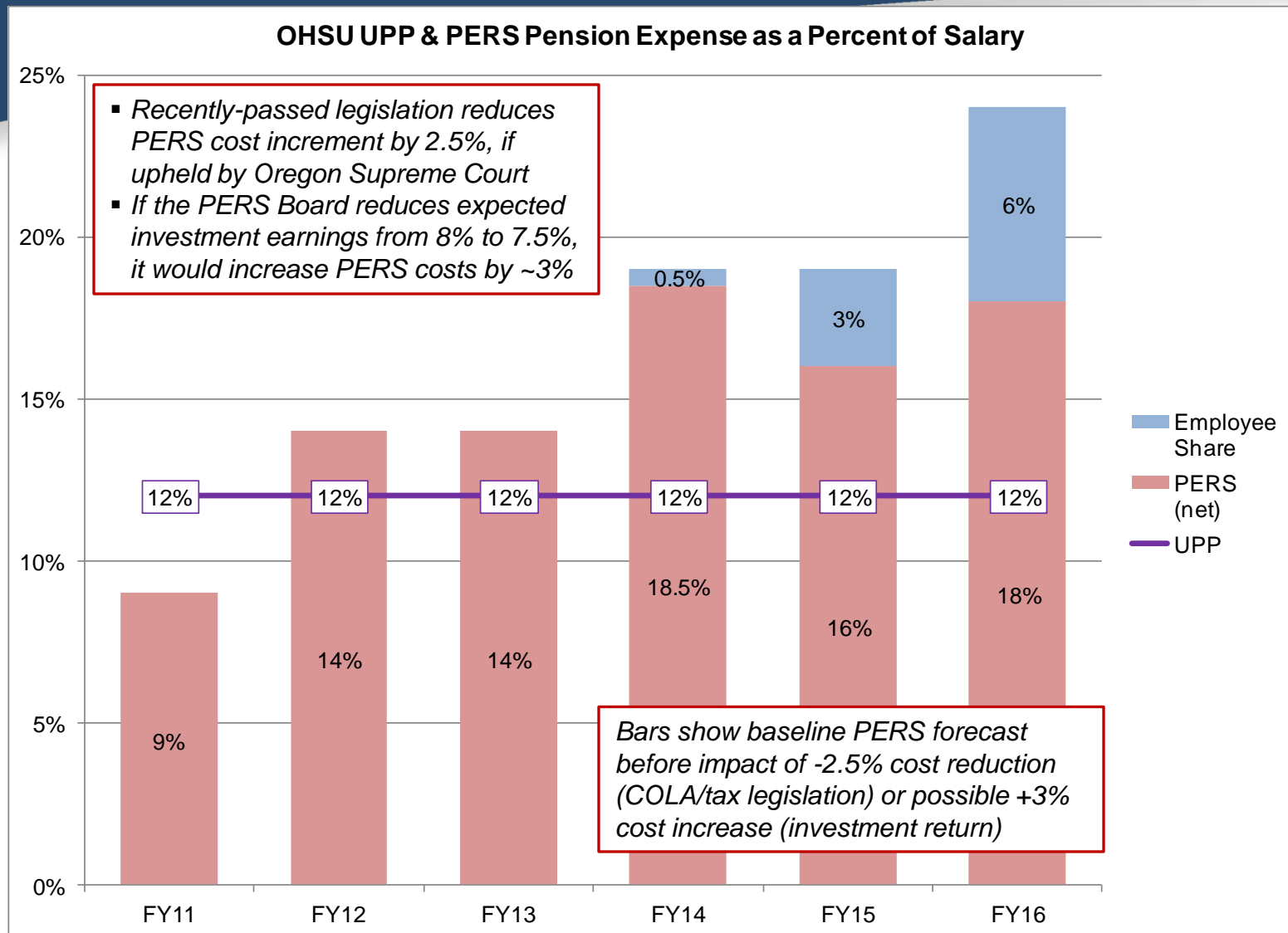


Source: Figure prepared by CRS. Dotted lines and asterisks show the addition of ARRA funds in FY2009 and FY2010. FY2011 amount is based on the Continuing Appropriations Act, 2011 (P.L. 111-242) as amended, which provides temporary funding at the FY2010 rate of operations.

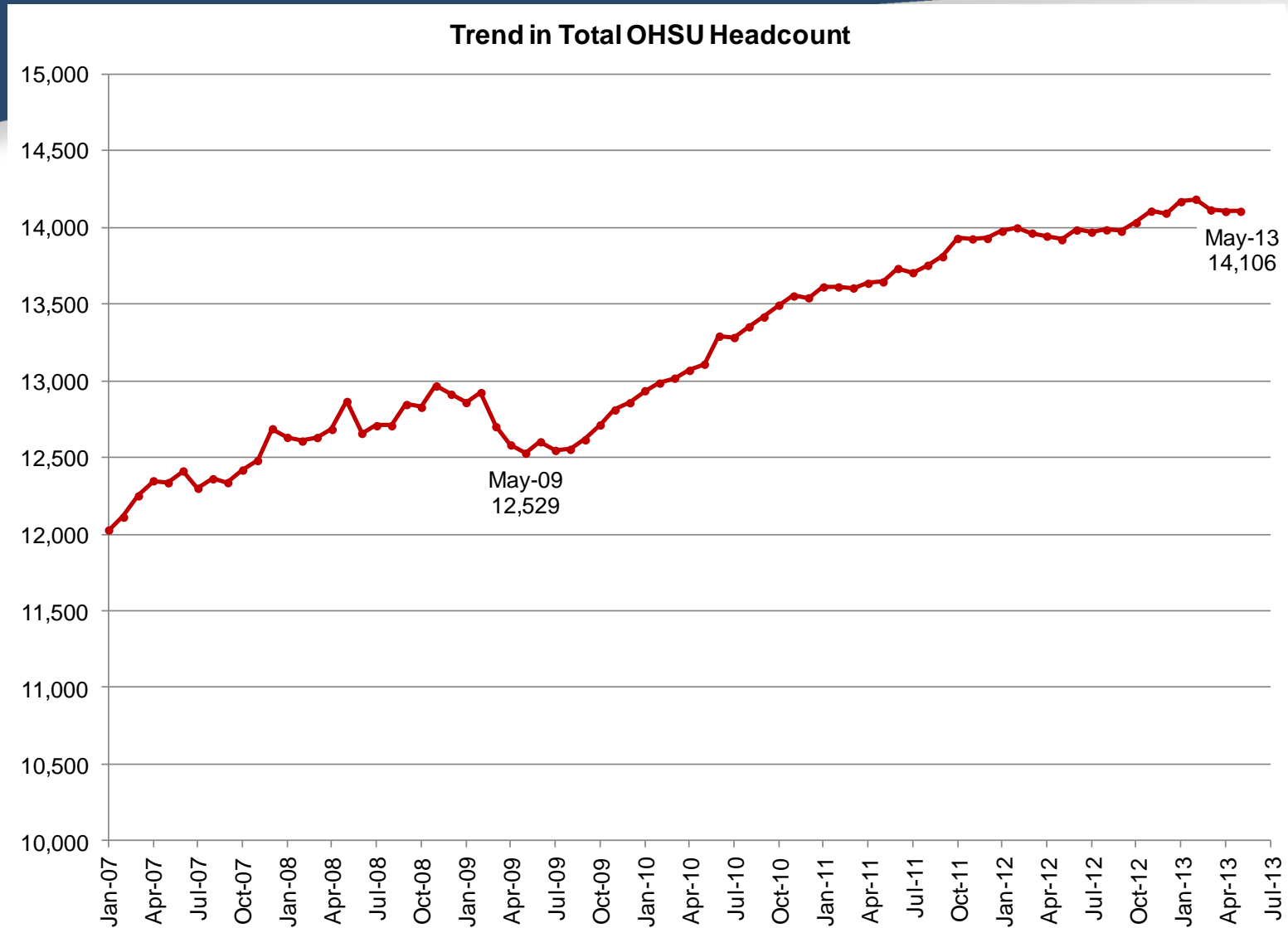
OHSU Awards Reflect NIH Budget Hold-Back



PERS Pension Costs: Baseline Forecast



Headcount Grows > 14,000 Faculty & Staff



FY13 May YTD Financial Results

- Operating income through 11 months totals \$80 million, \$31 million above budget and 26% higher than last year.
- These results include \$7 million in one-time revenues: \$2 million affiliation payment plus \$5 million reversal of last year's transplant reimbursement reserve, which has now been resolved.
- Absent these two items, OHSU revenues are now \$35 million above target, supported by only \$12 million in higher spending.
- Patient activity (adjusted for outpatient and case mix index) is running 4% above budget, driving an equivalent increase in patient revenues—a significant improvement from earlier in the year, when lower payment rates and shifting payer mix had a larger negative impact on revenues.
- Operating cash & investments are up \$99 million, reflecting strong earnings, payment of last year's FICA settlement, and timing considerations on the CLSB.

May Earnings at \$80M (\$31M > Budget)

May YTD (11 months) (millions)	FY12 Last Year	FY13 Budget	FY13 Actual	Actual - Budget	Actual / Last Year
Net patient revenues	\$1,318	\$1,339	\$1,400	\$61	6.2%
Grants & contracts	322	339	331	(8)	2.9%
Gifts applied to operations	40	57	49	(8)	23.6%
Tuition & fees	50	57	54	(3)	7.4%
State appropriations	32	28	28	0	-14.8%
Other revenue	75	88	88	(0)	17.2%
Operating revenues	1,838	1,908	1,950	42	6.1%
Salaries & benefits	1,083	1,132	1,137	6	5.0%
Supplies & services	559	598	603	5	7.9%
Depreciation	101	100	103	2	1.6%
Interest	31	29	27	(1)	-12.5%
Operating expenses	1,774	1,859	1,870	12	5.4%
Operating income (loss):					
Hospital	68	49	81	32	19.8%
Other university	(4)	0	(1)	(1)	-72.6%
Total OHSU	\$63	\$49	\$80	\$31	26.2%

Improvement from FY13 January Results

- May results demonstrate considerable improvement from four months earlier: year-to-date operating income is \$24 million higher than the January run-rate.
- This reflects improved payment rates plus steps implemented mid-year, including:
 - Ensuring that available and appropriate gift funds are applied
 - Ensuring that spending in central support areas stays below budget
 - Freezing hiring, with exceptions for critical patient care and other vital roles, at the personal approval of the responsible Executive Leadership Team member
 - Corresponding reduction in discretionary spending, such as travel and consulting
 - Accelerated completion of administrative and research productivity redesign from the PwC engagement.
- As each major area of OHSU demonstrates it is operating at its new budgeted level, the hiring freeze is lifted there, but with increased scrutiny of vacant positions to identify opportunities to reduce costs.

Significant Improvement Since January

FY13 Improvement (millions)	Jan YTD	Jan YTD x 11/7	May YTD	Change from Jan
Net patient revenues	\$871	\$1,369	\$1,400	\$31
Grants & contracts	206	324	331	8
Gifts applied to operations	29	46	49	3
Tuition & fees	35	55	54	(0)
State appropriations	18	28	28	0
Other revenue	55	86	88	2
Operating revenues	1,213	1,907	1,950	44
Salaries & benefits	719	1,130	1,137	7
Supplies & services	374	588	603	15
Depreciation	65	102	103	0
Interest	19	30	27	(2)
Operating expenses	1,178	1,850	1,870	20
Operating income (loss):				
Hospital	42	66	81	15
Other university	(6)	(10)	(1)	9
Total OHSU	\$36	\$56	\$80	\$24
<i>CMI/OP adjusted admissions</i>	<i>60,169</i>	<i>94,551</i>	<i>94,147</i>	<i>-0.4%</i>
<i>Patient revenue / admission</i>	<i>\$14,478</i>	<i>\$14,478</i>	<i>\$14,873</i>	<i>2.7%</i>

Patient Activity 5.7% Above Prior Year

May YTD (11 months) (millions)	FY12 Last Year	FY13 Budget	FY13 Actual	Actual / Budget	Actual / Last Year
Admissions	27,450	27,634	27,363	-1.0%	-0.3%
Average length of stay	5.3	5.3	5.7	7.5%	7.5%
Average daily census	424	427	448	4.9%	5.7%
Surgical cases	27,617	27,600	28,023	1.5%	1.5%
Emergency visits	42,656	42,320	43,094	1.8%	1.0%
Ambulatory visits	673,592	715,507	705,286	-1.4%	4.7%
Casemix index	1.87	1.88	1.96	4.3%	4.8%
Outpatient share	42.4%	42.5%	43.0%	1.2%	1.4%
CMI/OP adj. admissions	89,104	90,401	94,147	4.1%	5.7%

OHSU Net Worth ~\$2.2B with 2nd Knight Gift

Operating earnings, positive investment returns and the Knight Cardiovascular Institute gift push consolidated OHSU net worth to nearly \$2.2 billion on May 31, 2013. Operating cash & investments are up \$99 million, reflecting strong net income and payment by the IRS to OHSU of last year's FICA settlement, together with timing on CLSB construction, which is funded largely from project funds in FY13.

(millions)	6/30/12	5/31/13	Apr YTD	(millions)	May YTD
Cash & investments	\$499	\$598	\$99	Operating income	\$80
Quasi-endowment	83	89	5	Depreciation	103
CLSB project funds	130	64	(66)	Investment total return	22
Debt service & bond funds	55	49	(7)	Capital gifts & other	4
				Application of CLSB funds	66
OHSU-held investments	767	799	32	Application of bond funds	7
Interest in Foundations	665	787	123	Sources of cash	281
Net physical plant	1,282	1,362	80		
Long-term debt	(801)	(770)	31	Annual capital spending	(110)
Other assets, net	36	(2)	(37)	CLSB construction	(73)
				Debt repayment	(31)
OHSU net worth	1,949	2,177	\$228	Increase in quasi-endowment	(5)
				FICA settlement & other, net	37
Operating income			80	Uses of cash	(182)
Investment total return			22		
Gain on Foundations			123		
Capital gifts & other			4	Sources less uses of cash	\$99
Total change in net worth			\$228		

Disposition of FY13 Income > Budget

- Based on May results, we expect to end FY13 with \$87 million of operating income, \$27 million above budget.
- This includes the \$5 million reversal of the transplant reserve, a non-cash items, thus cash flow from higher earnings is about \$22 million.
- We propose the following disposition:
 - \$7 million or one-third added to cash reserves
 - \$2 million added to Diversity fund for student aid and faculty recruitment, doubling amount from FY12 earnings
 - \$2 million (from affiliation payment) invested in commercializing ORATECH
 - \$6 million to fund world-class science, including an OHSU endowed chair and the new Center for Human Gene & Cell Therapy
 - \$5 million held to backstop transition to new OHSU-wide faculty compensation plan, to be developed in FY14 as a core of new budget process, under guidance of Senior Resource Allocation Group.

FY14 Budget Framework

Within the context of the national trends and current year results, units throughout OHSU have developed the FY14 budget presented here. After review by the Finance & Audit Committee, we are requesting approval from the Board of Directors on June 27th.

To budget is to choose. Two years ago, we refined OHSU's budget process, with the following goals:

- a. To encourage prioritization and tradeoffs to allocate resources optimally
- b. To set targets to measure financial performance
- c. To ensure reasonably equal rigor across areas
- d. To keep overhead costs from growing disproportionately
- e. To keep us from spending the same dollar twice
- f. To allow flexibility to meet emerging opportunities and challenges, because we have done a – e.

FY14 Margin Targets by Area

- In order to create a more predictable multiple-year budget planning process, we established the following margin targets for three budget cycles (FY12 – FY14):
 - Hospital 5%
 - School of Medicine/Practice Plan 2%
 - Provost Schools 4%
 - Research Centers/Institutes 0%
 - Administrative/overhead units -5% net reduction
 - Incremental OHSU-wide support initiatives \$2 million pool
 - New overhead allocation methodology implemented FY12, refined FY13 -14
- Together, these margin targets reflect a 5% margin on hospital revenues and a balanced budget in the rest of the university, or approximately \$65 million in FY14. Adding back depreciation and subtracting principal repayment, this will fund an annual capital budget of approximately \$150 million, or 4.5% above the current year's level after adjusting for \$8 million in new capital funding from the Knight Cardiovascular Institute gift.

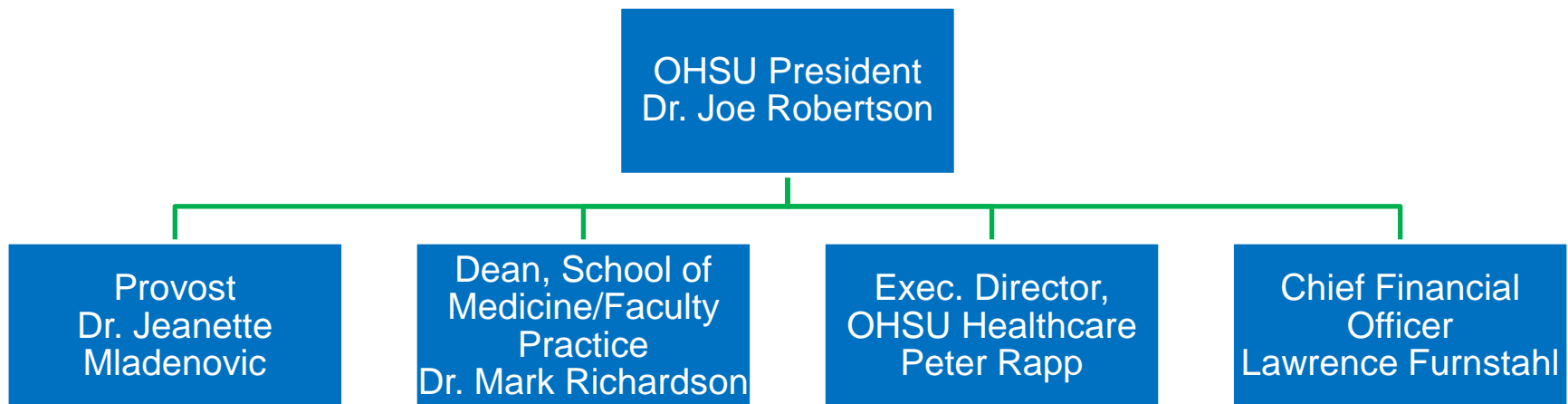
Meeting the FY14 Budget Targets

Meeting these targets requires the following:

- a. Continued growth in intensity-adjusted patient activity—up 11% over two years—to counteract flattening of clinical payment rates. This reflects the productivity of faculty combined with strong hospital management to increase throughput and control costs, bringing revenue to the bottom line.
- b. Estimated -3% drop in grant & contract revenue, reflecting the first year's impact of sequestration and a -11% year-over-year decline in dollar value of grant awards. Offsetting this in part are much higher gifts applied to operations (especially from the Knight gifts), flexing down direct research costs, and a -5% or \$5 million net reduction in central administrative and support costs.
- c. Operating expenses increase by 6%, including variable labor and supply costs to support 6% growth in patient activity, first full year of Knight Cardiovascular Institute, \$10 million increment to PERS pension expense, investments in community hospital partnership, Lean methodology, conversion to ICD10 coding, research integration, public safety and data security, offset in part by lower interest from bond refinancing and end of depreciation from original EPIC electronic health record modules.

OHSU Senior Resource Allocation Group

- FY14 budget marks the end of the three-year horizon for margin targets. While this budget approach succeeded in strengthening OHSU's financial position post-recession, it does little to foster integration and consistent execution across the University.
- President Robertson has asked for a more integrated approach to OHSU's budget, with a new Senior Resource Allocation Group to make decisions across major units.
- Future budgets will include a “faculty outward” look, starting with unified and consistent expectations for faculty effort, compensation and support costs across OHSU.



FY14 Budget Targets \$65M Operating Income

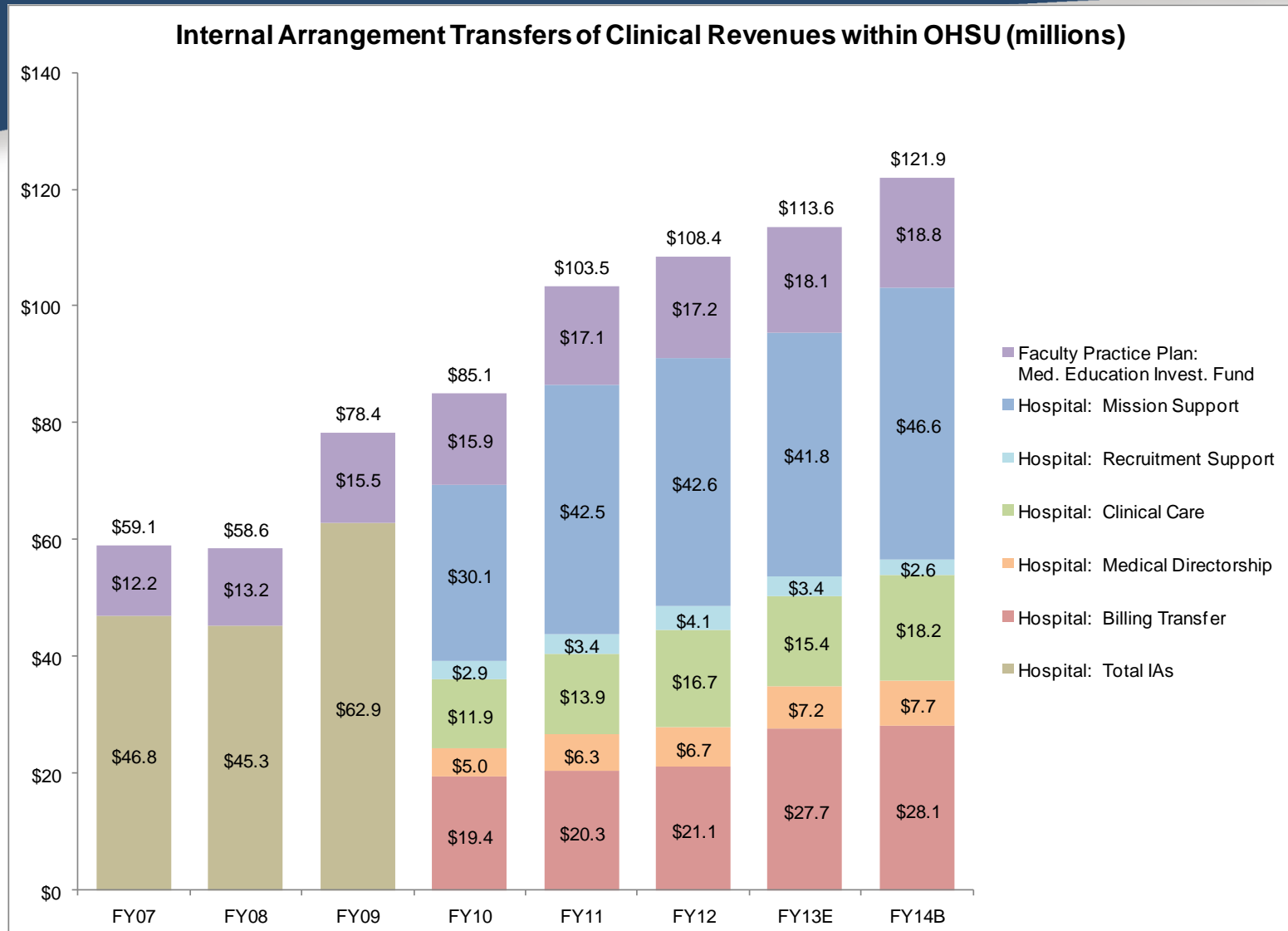
Proposed Budget (millions)	FY12 Last Year	FY13 Budget	FY13 Estimate	FY14 Proposed	FY14B / FY13E
Net patient revenues	\$1,441	\$1,466	\$1,520	\$1,604	6%
Grants & contracts	355	370	366	353	-3%
Gifts applied to operations	49	62	58	77	32%
Tuition & fees	60	63	59	62	5%
State appropriations	35	30	30	34	13%
Other revenue	95	96	96	99	3%
Operating revenues	<u>2,036</u>	<u>2,087</u>	<u>2,129</u>	<u>2,229</u>	<u>5%</u>
Salaries & benefits	1,184	1,234	1,243	1,323	6%
Supplies & services	623	653	658	703	7%
Depreciation	111	109	112	113	1%
Interest	35	31	30	25	-17%
Operating expenses	<u>1,953</u>	<u>2,027</u>	<u>2,042</u>	<u>2,164</u>	<u>6%</u>
Operating income	<u>\$83</u>	<u>\$60</u>	<u>\$87</u>	<u>\$65</u>	<u>-25%</u>

Healthcare Growth Exceeds Rest of OHSU

Proposed Budget (millions)	FY12 Last Year	FY13 Budget	FY13 Estimate	FY14 Proposed	FY14B / FY13E
Hospital operations:					
Operating revenues	1,178	1,193	1,235	1,311	6%
Operating expenses	1,097	1,133	1,150	1,246	8%
Hospital earnings	81	60	86	65	-24%
Other university operations:					
Operating revenues	858	894	894	918	3%
Operating expenses	856	894	893	918	3%
Other university earnings	2	0	1	0	-100%
Total OHSU operating income	83	60	87	65	-25%

Clinical faculty generate 6% patient activity increase, which hospital management brings to bottom line, after internal arrangements transfer to balance earnings with other university operations.

Clinical Revenues Reallocated Within OHSU



Clinical Enterprise Goals

- Create **high performing** care delivery systems that strive to achieve the triple aim: better care, better health, lower cost
- Be an **innovative** and **diverse** organization
- Be an organization with **highly engaged** faculty, leaders and staff
- Innovate to meet Oregon's health and science **workforce** needs
- Operate as an **integrated clinical enterprise**
- **Invest in programs** with the greatest opportunity for advancing the clinical enterprise

Guiding principle for operating budget: alignment with clinical strategic plan

Patient Activity Budgeted to Grow 5.7%

	FY11	FY12	FY13 Proj	BY14	FY13 Proj to BY14	
Inpatient cases	28,686	29,787	29,854	30,852	✓	3.3%
Average length of stay (ALOS)	5.7	5.3	5.6	5.5	✓	-1.8%
Average daily census (ADC)	429	425	447	455	✓	1.8%
Casemix index (CMI)	1.91	1.88	1.96	1.96	✓	0.0%
Surgical cases	29,528	30,079	30,603	31,268	✓	2.2%
Emergency visits	46,070	46,399	47,145	46,067	✓	-2.3%
Outpatient (OP) share of activity	42.2%	42.6%	42.9%	44.2%	✓	3.0%
Ambulatory visits	698,621	735,279	773,737	811,709	✓	4.9%
CMI/OP adjusted admission	94,719	97,638	102,459	108,308	✓	5.7%

Assumptions:

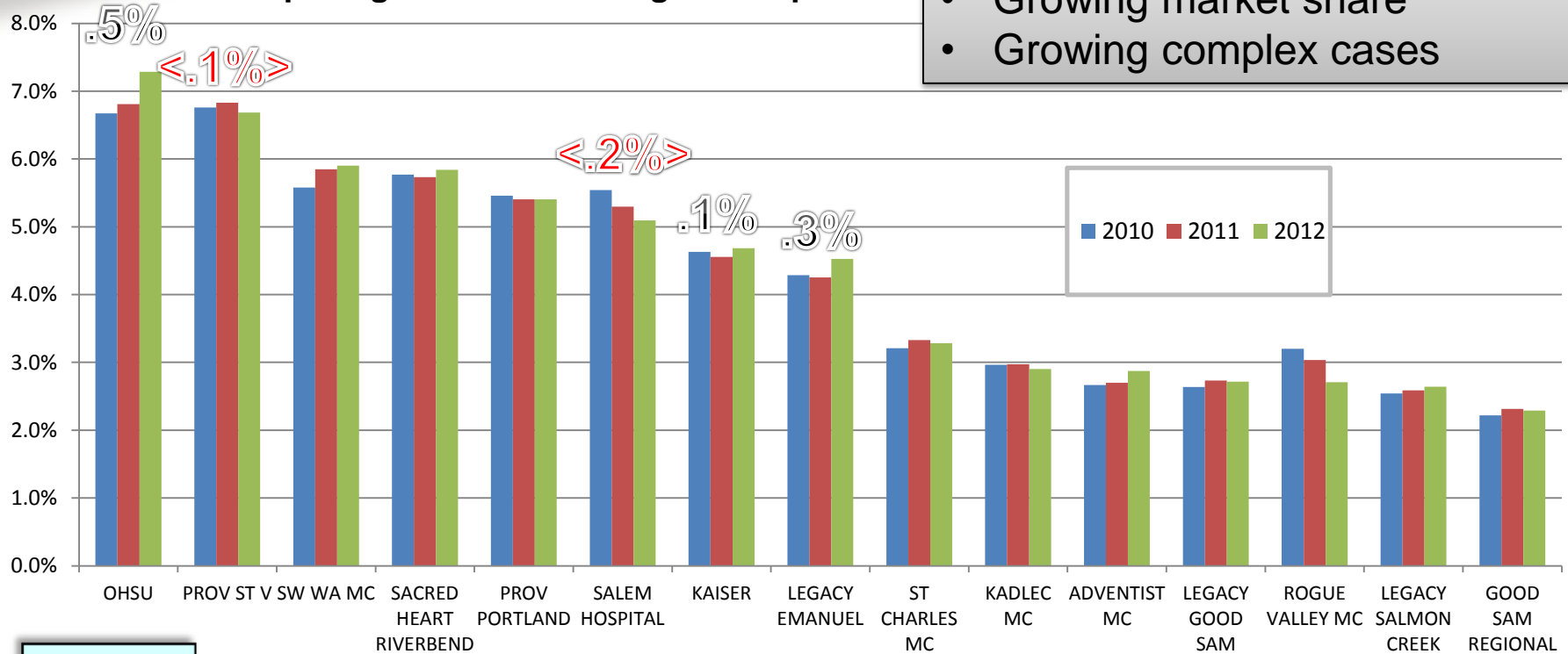
- Continued growth in complex inpatient cases
- Higher rate of growth in outpatient/ambulatory services

Market Share of Inpatient Cases

Top Oregon & SW Washington Hospitals

Historical Trends reflect OHSU is:


















- Growing market share
- Growing complex cases



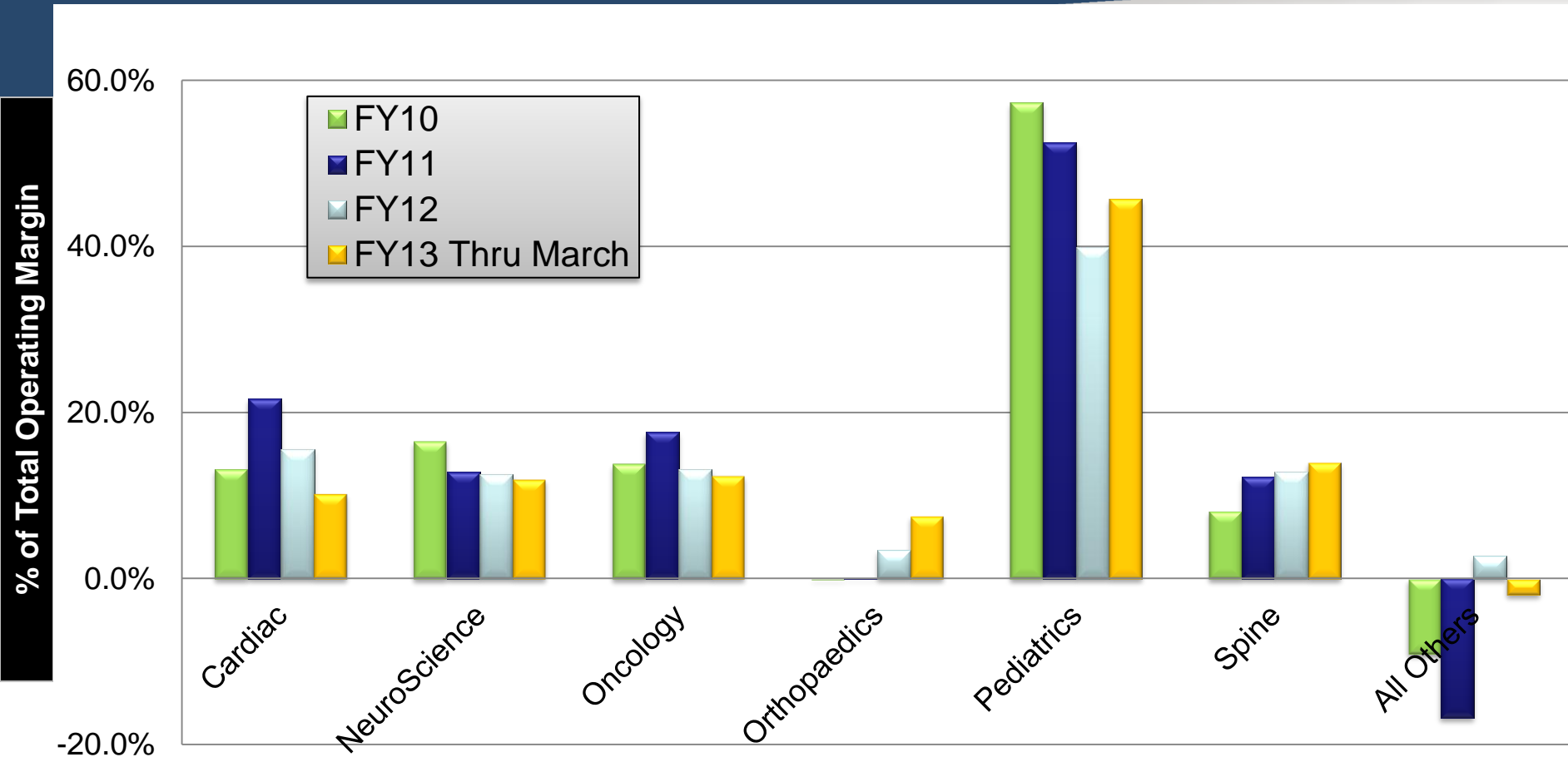
Case Mix

CY	OHSU	PROV ST V	SW WA MC	SACRED HEART RIVERBEND	PROV PORTLAND	SALEM HOSPITAL	KAISER	LEGACY EMANUEL	ST CHARLES MC	KADLEC MC	ADVENTIST MC	LEGACY GOOD SAM	ROGUE VALLEY MC	LEGACY SALMON CREEK	GOOD SAM REGIONAL
2010	1.875	1.424	1.427	1.605	1.447	1.493	1.464	1.581	1.565	1.521	1.327	1.554	1.637	1.245	1.564
2011	1.874	1.466	1.425	1.679	1.494	1.531	1.568	1.588	1.587	1.472	1.369	1.522	1.611	1.305	1.547
2012	1.908	1.509	1.444	1.710	1.508	1.558	1.623	1.592	1.666	1.497	1.406	1.557	1.687	1.307	1.500

Growth in Strategic Areas with High Acuity

Inpatient Cases	FY12	FY13	BY14	FY13 to BY14	CMI
★ Pediatrics	5,961	5,851	5,940	 1.5%	1.51
Womens	3,031	3,089	3,144	 1.8%	0.77
★ Oncology	2,885	2,833	2,913	 2.8%	2.64
★ Neuroscience	2,292	2,300	2,359	 2.6%	2.12
★ Cardiac	2,036	2,077	2,157	 3.9%	3.60
Medicine	1,891	1,963	2,036	 3.7%	1.19
★ Orthopaedics	1,868	1,975	1,987	 0.6%	1.93
Gastro/Digestive	1,671	1,646	1,692	 2.8%	1.72
★ Spine	1,214	1,084	1,189	 9.7%	3.41
★ Neonatal	963	1,045	1,172	 12.2%	2.43
General Surgery	1,052	1,066	1,087	 2.0%	2.43
Resp/Pulmonary	1,100	1,028	1,039	 1.1%	3.23
Psychiatry	885	965	965	0.0%	0.85
Renal/Urology	878	877	911	 3.9%	1.48
Hepatobiliary	577	623	639	 2.6%	2.04
Trauma	461	595	619	 4.0%	2.87
Vascular	479	440	442	 0.5%	2.28
ENT/Otolaryngology	201	177	179	 1.1%	1.40
Others	342	220	382	73.6%	1.53
TOTAL	29,787	29,854	30,852	3.3%	1.96

Strategic Areas Make the Hospital Margin



DISCHARGES Key Service Lines as % of Total

FY10	57.2%
FY11	58.1%
FY12	57.8%
FY13 thru March	61.6%

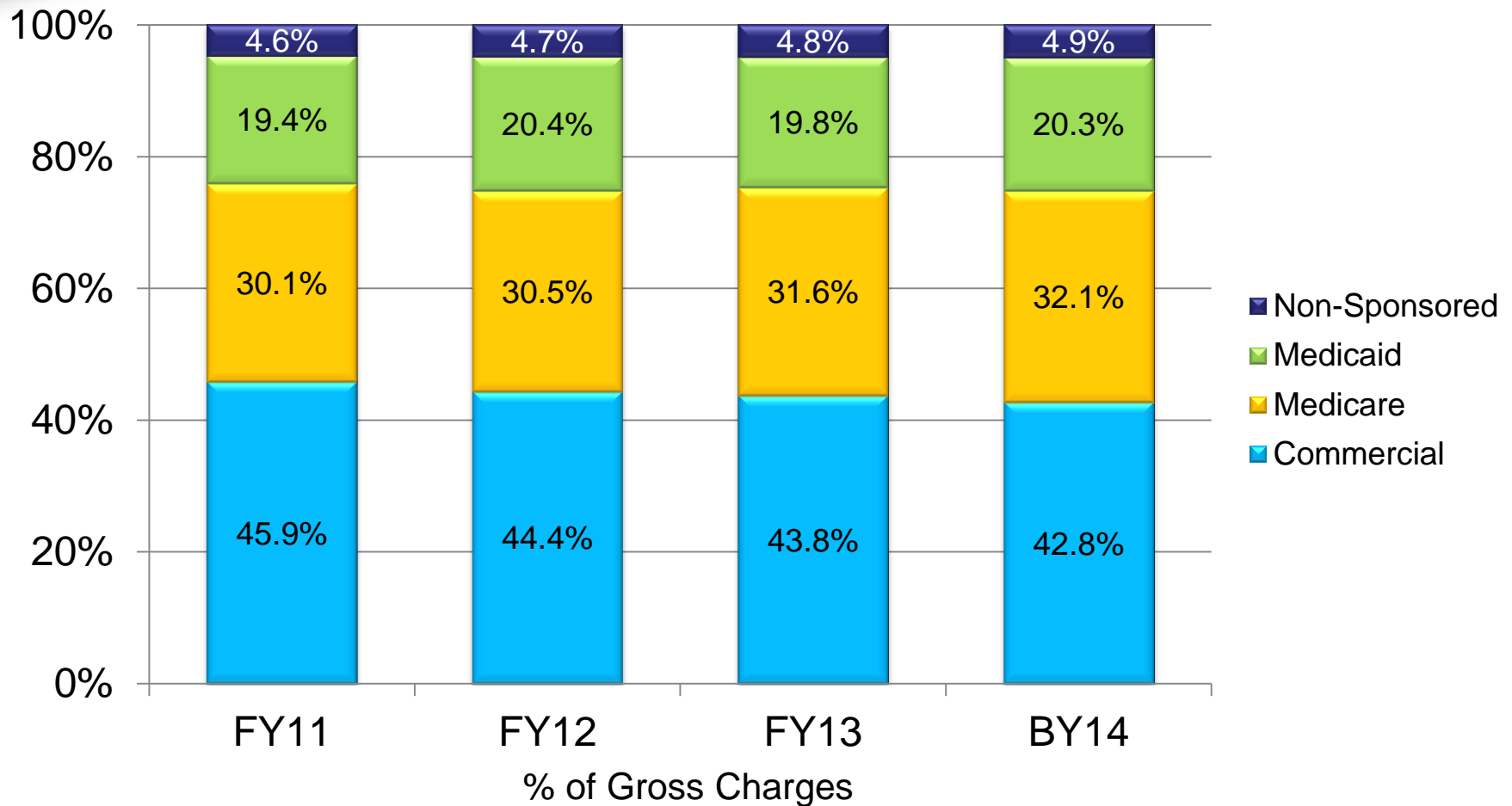
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OPERATING MARGIN Key Service Lines as % of Total

FY10	109.0%
FY11	116.7%
FY12	97.3%
FY13 thru March	101.9%

Payer Mix Shifts from Commercial

**Assumption:
Payer Mix Shift of 1% from Commercial to
Public Payers - Medicare and Medicaid**



Cover Oregon Exchange Premiums

Gold Standard Product (Age 40 – 44)



Current
Individual
Premium \$376

Exchange
Premium \$400



Current
Individual
Premium \$339

Exchange
Premium \$323



Current
Individual
Premium \$251

Exchange
Premium \$276

Hospital Provider Tax Expanded (Tax #4)



Uses of Hospital Provider Tax #4:

- Continues to fund:
 - OHP-Standard Population
 - Disproportionate Share (DSH) Program
 - **NEW** funding:
 - **Hospital Transformation Performance Program**
 - 1% Additional Tax
 - Distribution to hospitals based on Medicaid volume earned by quality/performance indicators

Tax Rate Effective 7/1/13:

- **5.32% of net patient revenues**

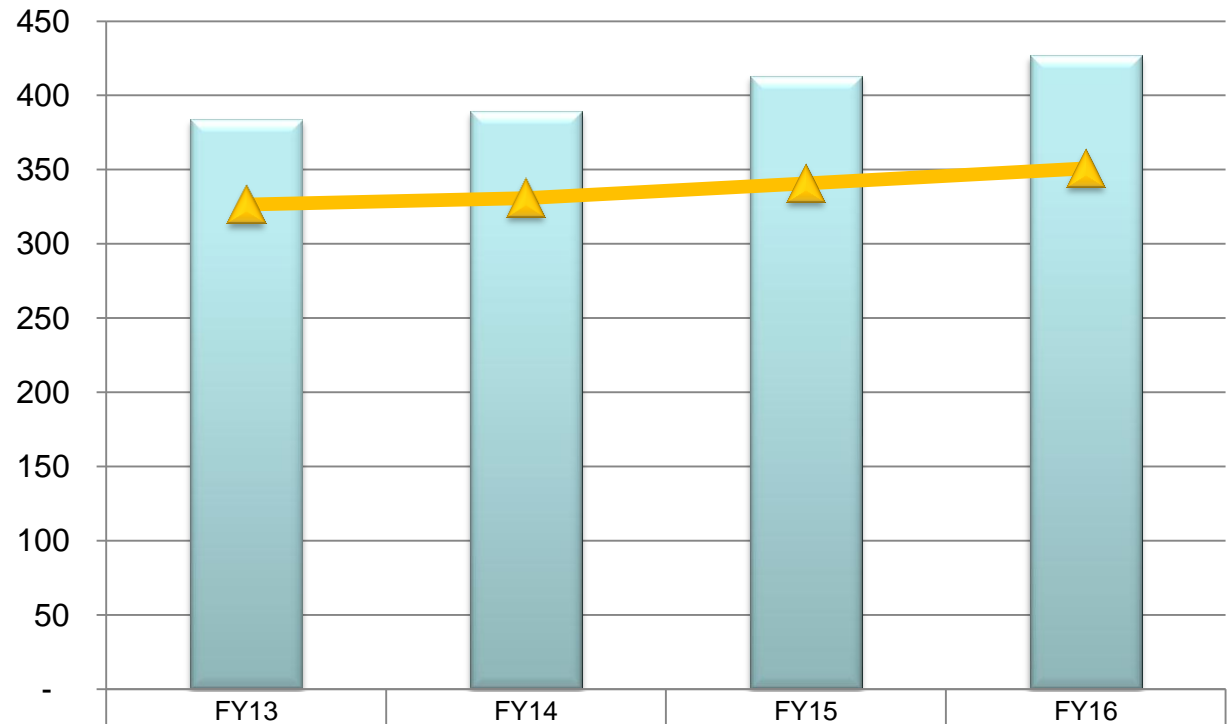
Capacity – Adults Beds & Average Census

Assumption:
Continue to manage adult capacity
constraints within existing buildings

FY14
Hospital South 14 C Wing
HRC10
Net 5 Beds

FY15
Hospital South 13 C Wing
Close 5A
Net 24 Beds

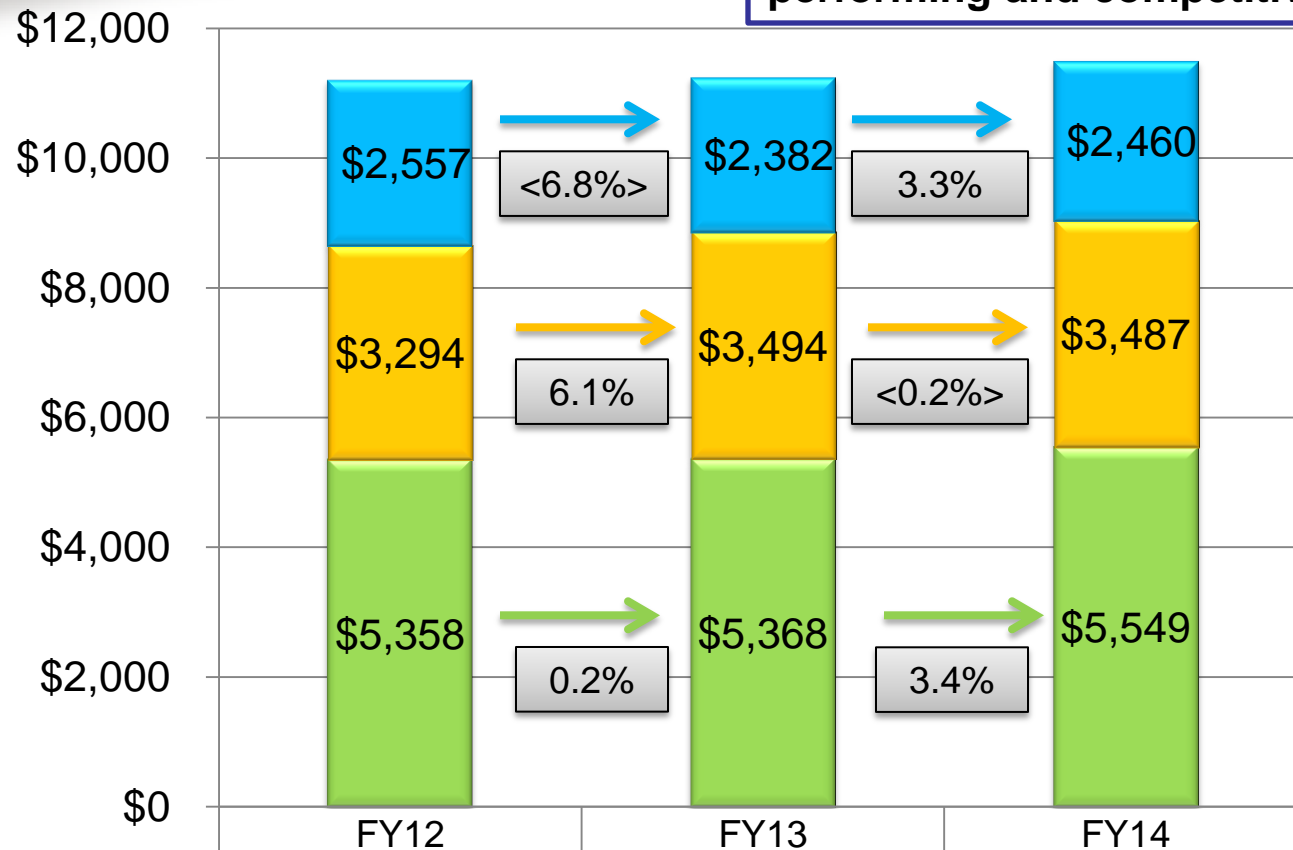
FY16
Open 5C
Net 14 Beds



Incremental Beds Needed at 85% Capacity	-			
Beds	384	389	413	427
ADC	326.4	330.7	340.6	350.8
Occupancy Rate	85%	85%	82%	82%

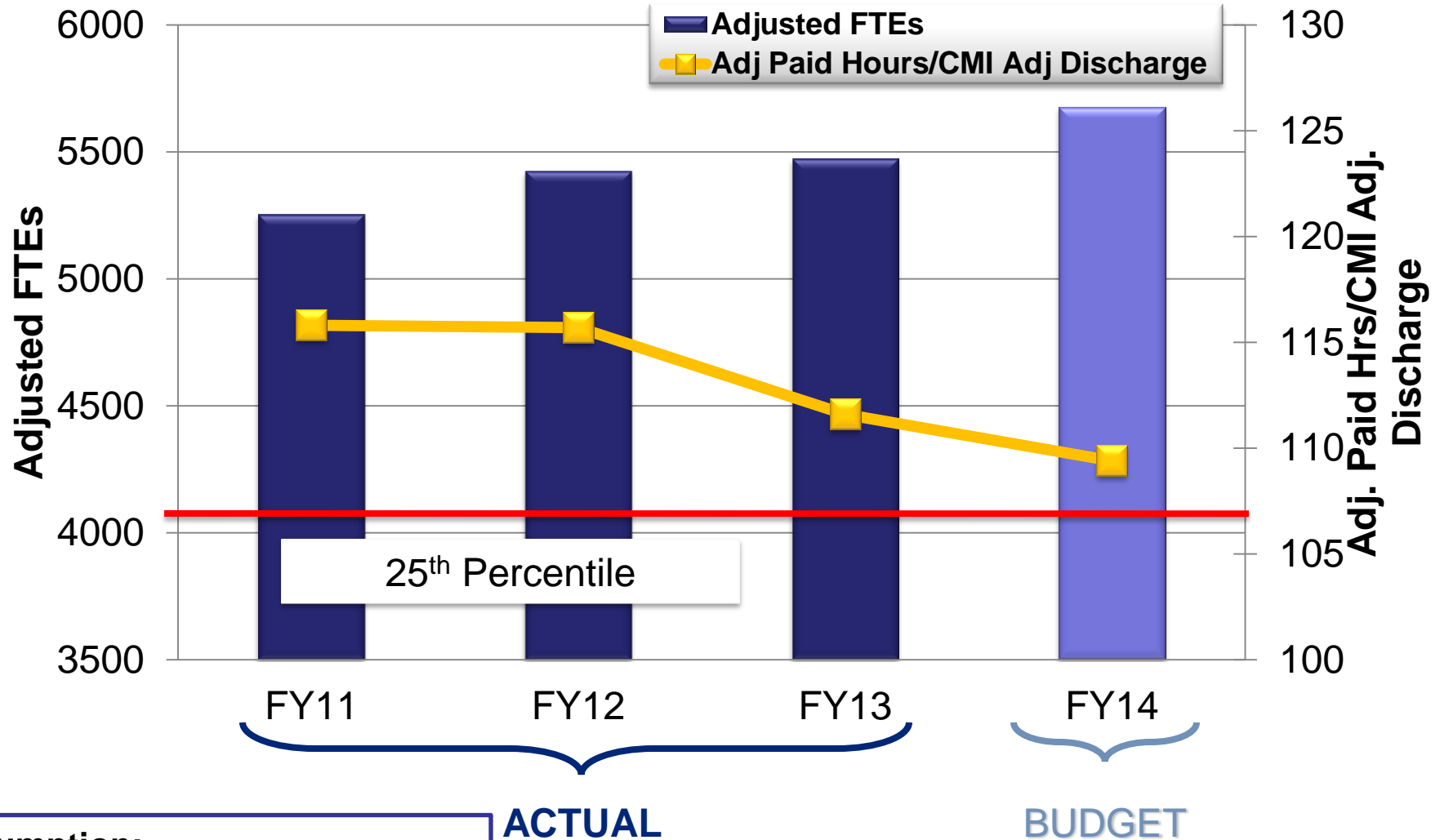
Expense per CMI Adjusted Discharge

Assumption:
Manage & control costs to be high performing and competitive in market



Overhead	\$2,557	\$2,382	\$2,460
Services and Supplies	\$3,294	\$3,494	\$3,487
Salaries/OPE	\$5,358	\$5,368	\$5,549

Improving Labor Productivity



Assumption:
Budgeted at 31% percentile or
135 FTEs above the best quartile

Investments: SOM/SON Internal Arrangements

Assumption:
Support Clinical Faculty Salaries at
appropriate market / productivity based levels

Support Type	Actual FY10	Actual FY11	Actual FY12	Projected FY13	Budget FY14
Clinical Care	11,867,350	13,896,720	16,691,580	15,418,184	18,191,782
Medical Directorship	4,955,892	6,299,113	6,683,074	7,245,982	7,700,568
Mission Support	30,148,732	42,468,151	42,626,443	41,756,383	46,573,710
Recruitment Support	2,938,275	3,431,609	4,074,234	3,362,437	2,576,719
Total IA Support	49,910,248	66,095,593	70,075,332	67,782,986	75,042,779
Billing	19,357,322	20,286,411	21,114,558	27,743,801	28,115,291
Total IA Funding	69,267,570	86,382,004	91,189,889	95,526,786	103,158,070

**Increase of \$7,259,793 for
FY14 or 10.7%**

Other Healthcare Investments

Growth

- Primary Care Expansion
 - New Walk In Clinic at Richmond
 - Medical Home Models
- Medication Reconciliation

High Performing Strategies

- Process Improvement/Lean Strategy
 - 9 FTEs with staged hiring dates
- ICD10 Preparation
 - Coder Training (Backfill = 10.5 FTEs)

Workforce

- Doernbecher PACU
- Pediatric ED
- Respiratory Therapy

Partnerships

- Mid-Columbia - \$3m
- OHSU Knight Legacy Health Cancer Collaborative
- KDL Laboratory Integration to Hospital

Infrastructure

- Hospital Transportation
 - 11 FTEs, temporary due to Pneumatic Tube upgrade
- Software License/Maintenance
- Flu Vaccination Program

Clinical Enterprise Risks and Challenges

- **Payment** Transformation
 - Implications of Medicaid CCO models
 - Market response to Commercial Exchanges
 - Ability to achieve competitive Managed Care rate increases
- **Pricing Transparency** – OHSU charges 15% below national median for teaching hospitals, adjusted for case mix
- Increased **competition** in market
- **Bed Capacity** constraints
- Achieving **labor** productivity targets
- **Faculty** stability



School of Medicine Priorities

- Tuition, clinical revenues and gifts projected to increase, but grants and indirect cost recoveries project to decline
- How do we respond? Across all departments/units:
 - Review of administrative structures – Basic Science Dept. combining (PwC)
 - Estimated savings to help support bridging of faculty in the Basic Sciences
 - Standardizing and actively managing grant funding/bridging and related policies
 - Assuring clinical faculty of fair compensation for effort (PwC)
 - Reductions in Knight Diagnostics Lab
- Continue to invest in strategic areas of strength, distinction, or emerging –
 - Cardiovascular, Cancer, Computational Biology, Immunology, High Resolution Microscopy and Structure Function, Neuroscience and others

Provost Initiatives & Education Priorities

- Tuition Reduction Initiatives

- For FY14, all university fees (including the student medical and dental insurance) remained flat or are being reduced.
- Tuition increases for FY14 within the SoM MD program are proposed at approximately 2.5% (instead of the historical 4% annual tuition increase)
- Several academic programs equalized the FY14 resident and non-resident tuition rates to create equity in tuition assessment
- OHSU is engaging the legislature to receive funding for initiatives that would freeze the tuition rate for returning students in FY15 and beyond

- Student Debt Reduction & Increased Grant-in-Aid Opportunities

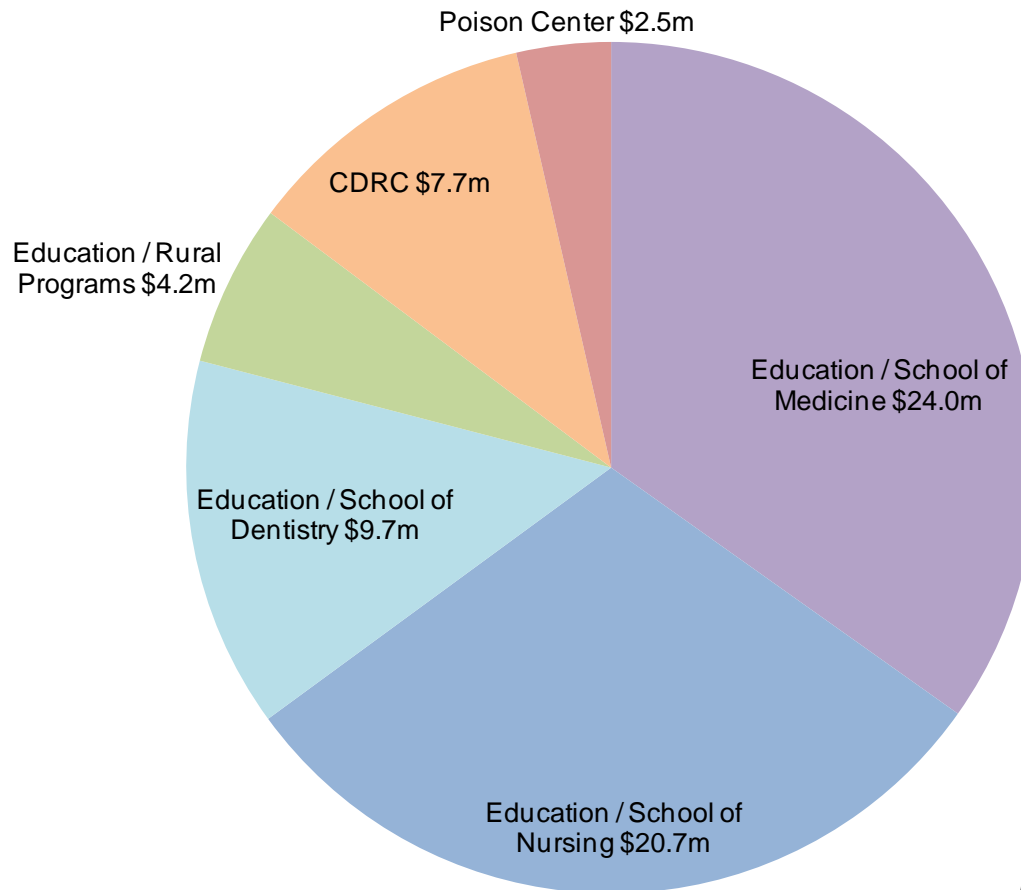
- Student debt management counseling is continuing and is being heavily utilized and well-received by students
- Additional Grant-In-Aid (scholarship) funding was allocated to simultaneously address diversity initiatives as well as reduce potential student loan debt

Provost Initiatives in FY14 (continued)

- Additional Provost Office Initiatives
 - For FY14 implemented a unified Academic Calendar across OHSU programs setting the stage for the opening of the CLSB as well as other collaborative initiatives across the schools and academic programs
 - Created an Interprofessional Education Initiative with the goal of developing a new collaborative curriculum. Also exploring changes to current tuition structure to better allow for interprofessional courses
 - Implementing a unified course evaluation system across all OHSU programs
 - In response to NWCCU accreditation recommendation, implementing a Student Web Portal, providing students with better access to information and services
- Successful recruitment of new Deans in School of Nursing and School of Dentistry
- Successful implementation of shared administrative services model in the Schools of Nursing and Dentistry, per recommendations of PwC.

Anticipated State Appropriation to OHSU

**Anticipated State Appropriation: 2013 - 15 Biennium
(total = \$68.9 million over 2 years)**



*Based on legislative
action through 6/18/13*

Proposed Tuition & Fee Rates

- FY14 budget includes tuition & fee rate increases of 2.5% for MD students, 10% for DMD students (averaged over 4 years), and 5% for BS/RN students.
- Among U.S. medical schools, OHSU's tuition for in-state residents is now ranked third, still high but down from first in 2009 – 2010 (see table below). Resident tuition for DMD students is ranked 24th among all U.S. dentistry schools, based on latest (2011) data. BS/RN tuition is lower than Linfield and University of Portland, but above George Fox and Concordia Universities.
- We have tripled “grants in aid” from \$1 million to \$3 million over the past 4 years.
- Contingent on the funding level for OHSU's State appropriation, we will begin in FY14 to commit to students that we will hold their tuition constant through all years of their program (e.g. for 4 years for MD and DMD students). When fully phased in, this commitment will reduce tuition revenues by \$2.5 - \$3 million per year.

2009 - 2010 First Year MD Tuition & Fees

Res. Rank	School	Resident	Non-Resident
1	OHSU	\$38,684	\$51,840
2	Virginia	\$37,242	\$47,242
3	Minnesota	\$36,444	\$44,352
4	UC Davis	\$29,678	\$41,923
5	Oakland Beaumont	N/A	N/A

2013 - 2014 First Year MD Tuition & Fees

Res. Rank	School	Resident	Non-Resident
1	Oakland Beaumont	\$49,062	\$49,062
2	Virginia	\$48,960	\$48,960
3	OHSU	\$44,463	\$59,631
4	UC Davis	\$40,967	\$53,212
N/A	Minnesota	N/A	N/A

Proposed 2013 – 2014 Full-Time Tuition

MD, DMD & Dental Grad (Yearly Amounts)	Terms of	2012-13	2013-14	Dollar	Percent	2012-13	2013-14	Dollar	Percent
	Attendance	Resident	Resident			Non-Res	Non-Res		
	in 2013-14	Tuition	Tuition	Increase	Increase	Tuition	Tuition	Increase	Increase
MD 1st Year	4	\$37,525	\$38,428	\$903	2.41%	\$52,323	\$53,596	\$1,273	2.43%
MD 2nd Year (12-13 amount is 1st year)	4	\$37,525	\$38,428	\$903	2.41%	\$52,323	\$53,596	\$1,273	2.43%
MD 3rd Year (12-13 amount is 2nd year)	4	\$37,449	\$38,428	\$979	2.61%	\$52,245	\$53,596	\$1,351	2.59%
MD 4th Year (12-13 amount is 3rd year)	4	\$37,462	\$38,428	\$966	2.58%	\$52,261	\$53,596	\$1,335	2.55%
DMD 1st Year - Yearly Tuition	4	\$36,548	\$40,203	\$3,655	10.00%	\$58,992	\$64,891	\$5,899	10.00%
DMD 2nd Year (12-13 amount is 1st year)	4	\$36,548	\$41,880	\$5,332	14.59%	\$58,992	\$67,666	\$8,674	14.70%
DMD 3rd Year (12-13 amount is 2nd year)	4	\$38,072	\$41,428	\$3,356	8.81%	\$61,515	\$67,292	\$5,777	9.39%
DMD 4th Year (12-13 amount is 3rd year)	4	\$37,662	\$40,303	\$2,641	7.01%	\$61,176	\$66,557	\$5,381	8.80%
Dental Graduate Advanced Specialty	4	\$37,555	\$39,457	\$1,902	5.06%	\$45,666	\$47,944	\$2,278	4.99%

All Other Programs (Per Term Amounts)	Terms of	2012-13	2013-14	Dollar	Percent	2012-13	2013-14	Dollar	Percent
	Attendance	Resident	Resident			Non-Res	Non-Res		
	in 2013-14	Tuition	Tuition	Increase	Increase	Tuition	Tuition	Increase	Increase
Dietetic Intern, MS Clin. Nutrition & MCD*	4	\$6,990	\$6,300	-\$690	-9.87%	\$8,997	\$6,300	-\$2,697	-29.98%
Physician Assistant	4	\$8,500	\$8,712	\$212	2.49%	\$8,500	\$8,712	\$212	2.49%
Radiation Therapy	4	\$4,947	\$5,256	\$309	6.25%	\$6,336	\$6,336	\$0	0.00%
Grad Medicine (PhDs)	3	\$6,551	\$6,767	\$216	3.30%	\$7,262	\$6,767	-\$495	-6.82%
SoM MPH	3	\$2,850	\$3,165	\$315	11.05%	\$4,515	\$4,965	\$450	9.97%
Programs in Biostatistics	3	\$3,165	\$3,165	\$0	0.00%	\$4,515	\$4,965	\$450	9.97%
Biomedical Informatics (On Campus Students)	3	\$5,190	\$5,343	\$153	2.95%	\$5,955	\$6,135	\$180	3.02%
Biomedical Informatics (Distance Learning)	3	\$5,775	\$5,949	\$174	3.01%	\$6,585	\$6,786	\$201	3.05%
MCR & HIP	3	\$4,515	\$4,515	\$0	0.00%	\$4,515	\$4,515	\$0	0.00%
Biomed Engin, CLSU or Inst. of Environ. Health (PhD)	3	\$6,227	\$6,767	\$540	8.67%	\$6,227	\$6,767	\$540	8.67%
Biomed Engin, CLSU or Inst. of Environ. Health (MS)	3	\$6,045	\$6,045	\$0	0.00%	\$6,045	\$6,045	\$0	0.00%
Division of Management	3	\$4,965	\$4,965	\$0	0.00%	\$4,965	\$4,965	\$0	0.00%
Undergrad Nursing (Acc. Bacc. Students)	3	\$5,316	\$5,580	\$264	4.97%	\$7,092	\$7,452	\$360	5.08%
Undergrad Nursing (OCNE Students)	3	\$3,852	\$4,044	\$192	4.98%	\$7,056	\$7,404	\$348	4.93%
RN/BS	3	\$5,064	\$5,316	\$252	4.98%	\$5,064	\$5,316	\$252	4.98%
Grad Nursing PDX, Online or Outside OR	3	\$4,671	\$4,905	\$234	5.01%	\$6,030	\$6,336	\$306	5.07%
Grad Nursing Nurse Anesthesia	3	\$6,030	\$6,336	\$306	5.07%	\$6,030	\$6,336	\$306	5.07%

*While the full-time tuition rate shows a decrease, the tuition plateau was reduced thereby resulting in an increase in the actual tuition charge for credits above full-time.

Research Priorities for 2014

- Shift portfolio from individual R01-based grants to more program (P/U) and other large collaborative grants (e.g. Rare Diseases)
- Utilize newly developed funding success rate report to better predict future funding of principal investigators
- Provide training and exposure of faculty to funding through Department of Defense and other federal agencies besides NIH
- Utilize newly completed faculty research productivity data base (Cognos) to monitor and manage salary coverage
- Continue meetings with pharma and device companies (e.g. Medtronic) to increase industry-sponsored research
- Consider creation of an OHSU-affiliated Clinical Research Organization housing cash-positive Phase 3 and 4 Clinical Trials
- Build further excellence in Comparative Effectiveness Research and compete for Patient Centered Outcomes Research Institute Funding (PCORI)
- Continue to improve the increasing trend of licensing revenue by aggressive marketing of our technologies

Research Priorities (continued)

- Develop new Center focusing on advancing the fields of Human Gene and Cell Therapy (Shoukhrat Mitalipov appointed as the Director)
- \$4 million investment over 2 – 3 years to promote research integrations across missions and across OHSU (from Foundations funds)
 - Proposals currently being refined:
 - Clinical Research Process Improvement (study set up, contracting, IRB, etc.)
 - PCORI funding application for a Clinical Data Research Network with 1 million+ lives
 - Facilitation of tissue acquisition for biolibrary and other research purposes
 - \$1 million estimated spend in FY14

OHSU Corporate Partnerships: FEI & Intel

Sequencing the genome provides the “parts list” – we also need the “assembly manual”

Extreme-Scale Computing

Collaboration combines Intel’s expertise in extreme-scale computing with OHSU’s biomedical imaging & genomics expertise

Genomics

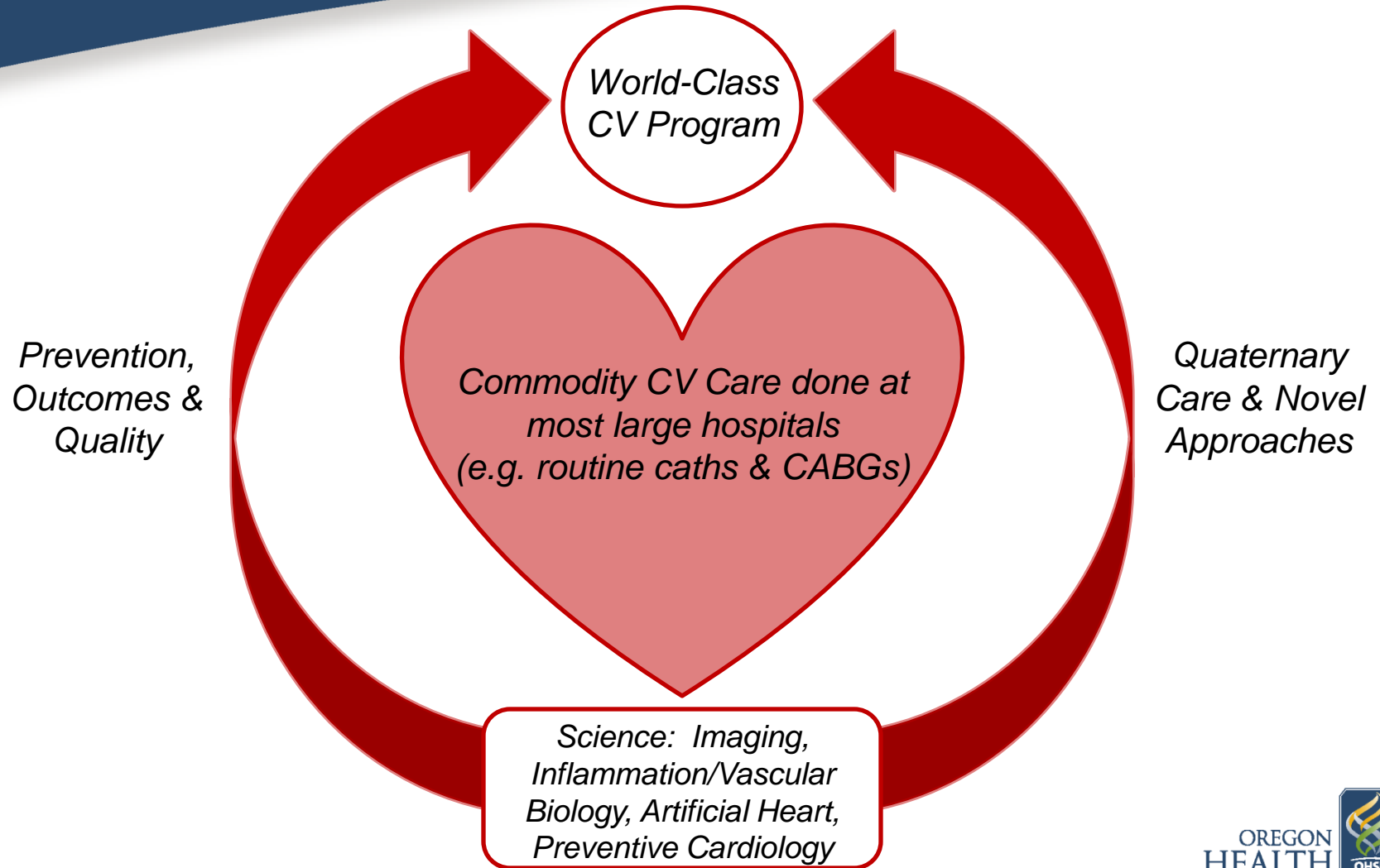
*Living Lab for Cell Biology
OHSU partnership with FEI, leading electron microscopy company*

Imaging

Projected FY14 Activity in Knight Institutes

	Knight Cancer Institute	Knight Cardiovascular Institute
Funding from Knight gift funds	\$20.1 million Operations \$5.0 million Capital	\$16.5 million Operations \$8.4 million Capital
Operations Detail	<ul style="list-style-type: none"> • Discovery Engine - Research • Knight Diagnostics Lab • Clinical Trials Support • Bio-Library • Business Development, Marketing, Outreach and Administration 	<ul style="list-style-type: none"> • Clinical Faculty Recruitments • Inpatient Service Line Support • Research Recruitments • Research Program Development • Cardio Metabolic Health Program • Business Development, Marketing, Outreach and Administration
Capital Projects	<ul style="list-style-type: none"> • Knight Diagnostics Lab • Bio Library • Discovery Engine - Research 	<ul style="list-style-type: none"> • Animal Angiography Suite • Animal Imaging Center • Endothelial Biology Equipment • Lipid Biology Core Equipment • Total Heart Center Equipment

Knight Cardiovascular Institute Approach



Knight CV Institute: Key Success Factors

- Recruitment:
 - Chief Operating Officer
 - Senior aortic surgeon
 - Senior vascular biologist
- Program business plans under development/consideration:
 - Cyclotron/PET imaging center
 - Cardiovascular core at Primate Center
 - Total Artificial Heart program
- Leveraging OHSU strengths and partnerships:
 - Inflammation science
 - Non-human primate models
 - Advanced imaging, genomics and large scale computing
 - Moore Institute for Nutrition & Wellness
 - New Center for Human Gene & Cell Therapy

Business Development Funding

- McKinsey engagement two years ago proposed diversifying OHSU's research funding beyond NIH, by commercializing science to industry.
- FY13 includes \$2 million affiliation payment, part of a long-standing real-estate and programmatic arrangement that included OHSU's Oregon Center for Aging & Technology. These funds are earmarked for future investment in ORCATECH under a business plan to commercialize its technology for advanced clinical trials.
- We are due a final \$1 million affiliation payment this fall, which we plan to invest in a progressive funding model designed to advance OHSU's technologies from early to mid to late stage development.
- This leverages other dollars from the Oregon Clinical & Translational Research Institute (OCTRI), Oregon Translational Research and Development Institute (OTRADI), the two Knight Institutes, and eventually outside investors.
- This effort is overseen by a Business Review Committee chaired by Dr. Tim Stout (OHSU Vice President for Technology Transfer and Business Development) and including Mark Richardson, Dan Dorsa and Lawrence Furnstahl.

Central Support Services Initiatives

- Continue third year funding of Diversity Initiative
- Move forward on addition of Data Center as well as replacing phone system
- Prepare Public Safety for adoption of an armed presence, pending Board approval
- Continue to hold the line on overhead costs, with -5% or \$5 million budget reduction
- Refine and improve core IT systems to maximize value and limit need for new additions
- Continue further achievement of PwC recommended cost reduction efforts:
 - Increasing use of virtual IT server pooling
 - Restructuring of fixed income investment management
 - Automating travel & expense processing
 - Creating new business intelligence reports key to reorganization of basic sciences
 - Automating corporate accounting (decentralizing journal input)
 - Cognos Business Intelligence, linking core OHSU production systems (Oracle, EPIC, Banner) to support productivity & process redesign, getting 80% of value at 20% of IT investment in PwC report.

OCA & \$2M Pool for Central Initiatives

- OHSU's budget assigns all revenues out to the hospital, schools and institutes, and allocates all costs, including indirect or overhead costs, such as central finance, IT, logistics, legal, HR, facilities, depreciation, interest and insurance.
- We then target an operating margin by unit (after internal support arrangements, such as from the hospital to the school of medicine), based on this “fully-loaded” view.
- These central overhead costs are referred to as “OCA” (for overhead cost allocation), and are allocated to units based on resources used: the number of employees, square feet of space, and dollars of direct spending.
- We set budget targets for central costs so that the OCA burden, as a percent of OHSU's budget, declines slowly, rather than increases over time, while also allowing a \$2 million pool for new initiatives critical to support the university. From FY13 to FY14, the effective OCA burden on the schools and institutes will decrease from 22.3% of direct spending to 21.8%.
- The next page outlines the current list for the central initiative pool for both the FY13 budget and the FY14 working list. Note that we are somewhat overspending the FY13 pool in order to accelerate enhanced data security, with a corresponding lower increment in FY14.

\$2M Pool for Central Initiatives (continued)

(000)	<i>Increments to Budget Base</i>	
	<u>FY14</u>	<u>FY15</u>
○ Creating campus armed presence within OHSU public safety (placeholder pending Board review and decision)	\$345	\$385
○ Foundation fundraising support (1 st of 4 annual increments to \$2 million requested by OSHUF, to help sustain development efforts given shortfall in interest earnings on Foundation current funds, given 2 – 3% lower rates on \$200 million)	500	500
○ National branding for OHSU and fundraising (2 nd half of mid-year funding approved for FY13)	175	
○ Inter-professional education and teaching simulation (2 nd half of mid-year funding approved for FY13)	240	
○ Investment in PSU Viking Pavilion for preferred OHSU access to large event space nearby, on PSU campus at bottom of Marquam Hill (1 st of 5 years \$1 million co-investment with PSU)	200	
○ Data encryption expansion	960	
○ Clinical research informatics: data governance & management		600
○ Unallocated (within \$4 million increment over FY14 & FY15)		95
Total working list for FY14 & FY15 central initiatives	<u>\$2,420</u>	<u>\$1,580</u>

PERS Pension Costs

- OHSU's pension costs exceeded \$105 million in FY12. About half of OHSU staff participate in the State's PERS defined benefit plan, and half in OHSU's own UPP defined contribution plan.
- This year, OHSU is contributing 12% of salary to UPP, and 14% of salary to PERS—a contribution rate reset every two years by the PERS Board.
- PERS' baseline estimate was that our contribution would increase from 14% to 19% this July 1st, for approximately \$20 million of incremental costs in the FY14 budget. Due to underfunding, the rate is expected to increase by another 5% (to 24%) in FY16.
- The Governor has signed legislation that reduces future COLA increases and eliminates the out-of-state tax remedy, which together reduce real PERS costs by 2.5%, from 19% to 16.5%, cutting the FY14 incremental cost in half, to \$10 million.
- These changes to PERS benefits will likely be litigated, and it is possible the Oregon Supreme Court could reverse them in whole or in part.

PERS Pension Costs (continued)

- In addition, the Legislature has instructed PERS to “collar” or defer another 1.9% of the contribution. For OHSU, this is equivalent to borrowing 1.9% or \$7.5 million per year at 8% interest (the expected PERS investment return).
- We propose contributing this 1.9% to an OHSU-specific “side account” within the PERS investment pool to reduce our unfunded liability, which we will have to start recording on OHSU’s balance sheet in 2015.
- The PERS Board may also adjust the expected rate of return from its current 8% to a more conservative 7.5%. This would increase required contributions by approximately 3%, starting in the next biennium.
- Finally, OHSU staff in PERS will begin contributing to the “employee pick up” next year, reaching the full 6% contribution in FY16.
- Thus, there is considerable uncertainty in net PERS costs to OHSU in the intermediate term. FY16 contribution rates (net of the employee contribution) could vary from:
 - 15.5% if the legislation is upheld and return rate is kept at 8%
 - 21% if the legislation is overturned and return rate is lowered to 7.5%
 - Each 1% point equals about \$4 million per year to OHSU.

Federal Funding for Medicaid Transformation

- The State has negotiated with the federal government for \$1.9 billion of new federal funds to support the Oregon Medicaid transformation effort. The mechanism by which these new funds are secured involves current spending by Oregon public entities on programs that support the target population, but which are not currently matched with federal funds through the Medicaid program. These programs include education and training of health care professionals at OHSU and other public universities and community colleges.
- We have been cooperating with the State to help secure these funds, as part of our support of Medicaid transformation and our role as a public institution. OHSU is not incurring any additional expenditures beyond our regularly budgeted education programs in the schools of nursing, dentistry and medicine, and OHSU is not receiving any additional revenues, but we are helping the State increase its funds for the Medicaid program, which of course helps all Medicaid providers in Oregon, including us.
- The mechanism for this Medicaid matching is complicated, but we have worked with the Oregon Health Authority on the appropriate protocol, now in effect. We report to the State on educational expenditures that fit under the program; the State submits this to the federal government, which reimburses its share under the Medicaid program; these funds are sent by the State to OHSU, and once we have confirmed receipt, we send them back to the State by the next day.

Federal Funding for Medicaid (continued)

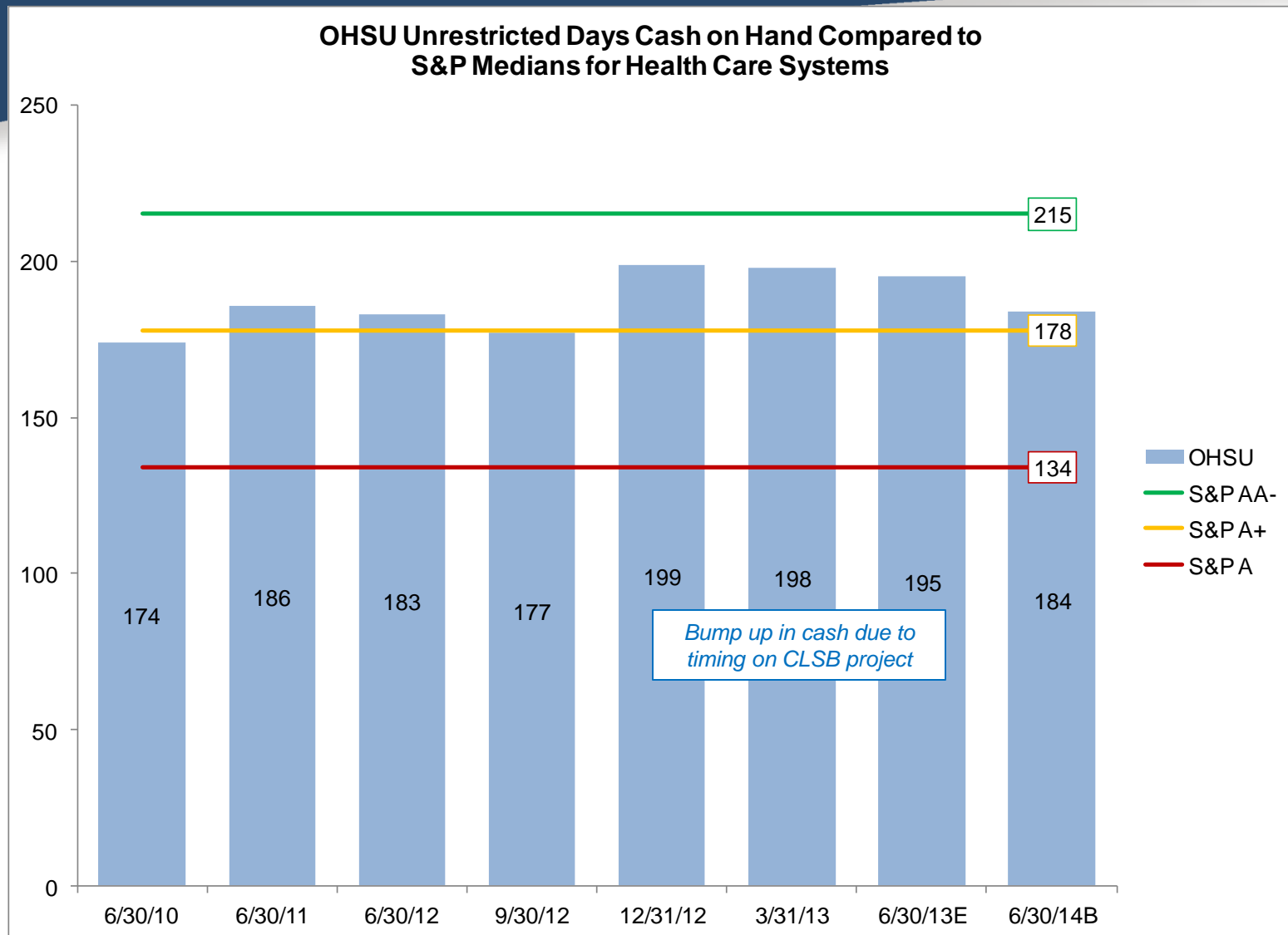
- OHSU is not providing any services to the State, nor expending any incremental funds or resources, and the net financial impact will be zero, since we wire back exactly the amount we receive. We have negotiated appropriate indemnifications from the State as part of this process.
- We estimate our component of these transfers to be approximately \$35 million per year, into and then back out of OHSU's bank account. The first transfer in and out (covering the first 8 months of this fiscal year) occurred in March, with subsequent transfers occurring monthly.
- Because we are providing no services under this agreement (but only facilitating the State's ability to secure agreed-upon funding under its Medicaid waiver with the federal government), OHSU does not have revenue or expense. Therefore we will account for the matching inflow and outflow on the same line of our financial statements, netting to zero and thus not impacting the totals for either revenue or expense.

FY14 Cash Flow Target

- FY14 cash flow target is designed to fund a reasonably robust annual capital budget, while maintaining OHSU's days cash on hand at about 180 days—a key credit rating consideration.
- CLSB is funded through a combination of debt, gifts (both already received in cash and pledged for future payment), and retained earnings, particularly from the School of Dentistry. Because bond/project funds are applied first, there is a bump up in cash balances in FY13, offset by a reduction next year.
- FY14's budgeted \$65 million in operating income, plus the Knight gifts, support a \$150 million annual capital budget, with ending cash of 184 days, 6 days above the S&P median for A+ credits, and 1 day above last year end.

Funds Available for Capital (millions)	FY14 Budget
Operating income	\$65
Depreciation	113
Investment total return	10
Capital gifts & other	13
Principal repayment	(20)
Gift receipt timing on CLSB	(31)
Available for annual capital	<u>\$150</u>

Days Cash on Hand Held Above A+ Median



Budgeted Net Worth Approaches \$2.3B

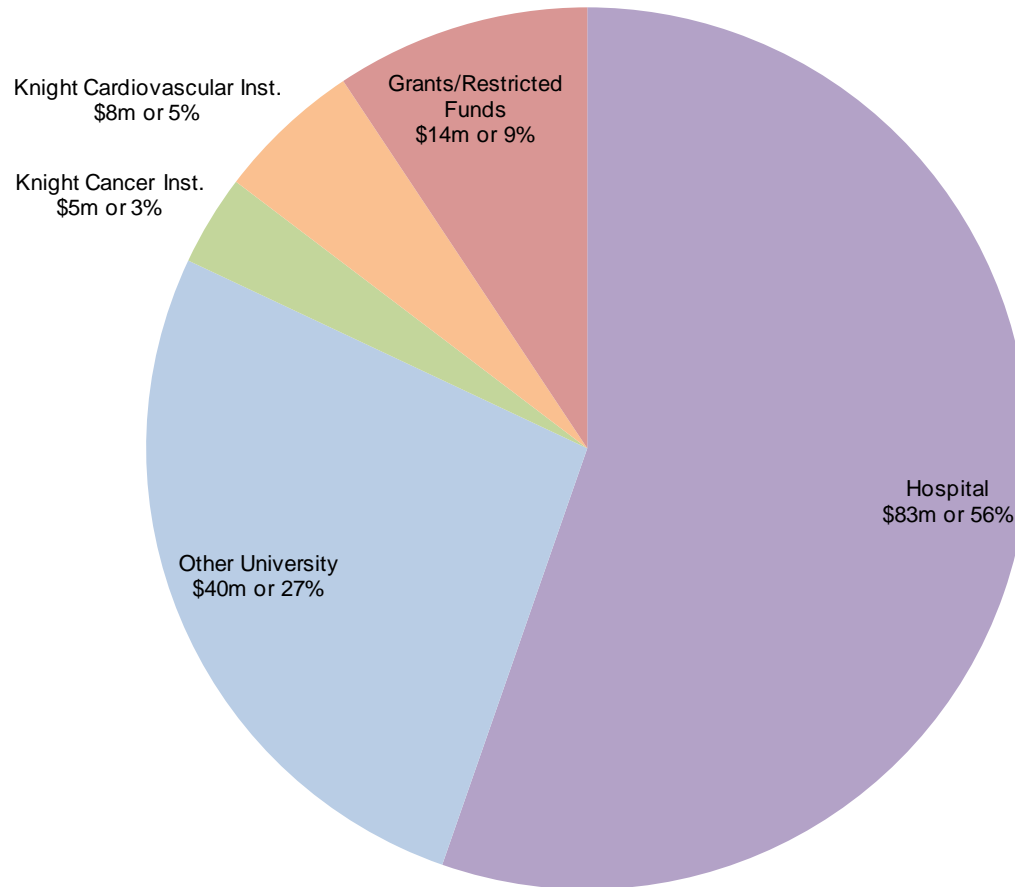
(millions)	6/30/12	6/30/13	6/30/14	2 Yr Change
Cash & investments	\$499	\$592	\$590	18%
Quasi-endowment	83	89	89	7%
CLSB project funds	130	55	0	-100%
Debt service & bond funds	55	48	48	-13%
	<hr/>	<hr/>	<hr/>	<hr/>
OHSU-held investments	767	785	728	-5%
Interest in Foundations	665	790	805	21%
Net physical plant	1,282	1,369	1,494	17%
Long-term debt	(801)	(767)	(747)	-7%
Other assets, net	36	9	9	-74%
	<hr/>	<hr/>	<hr/>	<hr/>
OHSU net worth	1,949	2,186	2,289	17%
Operating income		87	65	
Investment total return		20	10	
Gain on Foundations		125	15	
Capital gifts & other		5	13	
		<hr/>	<hr/>	
Total change in net worth		\$237	\$103	

Proposed Capital Budget: Overview

- Annual capital spending of \$150 million:
 - \$83 million in hospital capital, including components of jointly funded IT projects
 - \$67 million in university non-hospital projects, including \$14 million from grants
 - Includes \$9 million for the second of three years for a new \$22 million data center at the West Campus
 - \$6 million for the third of five years for the Unified Communications project (telephone system replacement)
 - \$3.3 million for the first of two years for North Campus Utility Plant (chiller) replacement, a higher risk infrastructure project deferred in prior years
 - \$5 million for Knight Cancer Institute: Knight Diagnostic Lab, Bio-Library, Discovery Engine research
 - \$8 million for Knight Cardiovascular Institute: Animal Angiography Suite and Imaging Center, Endothelial Biology and Lipid Biology Core equipment, Total Artificial Heart Center equipment

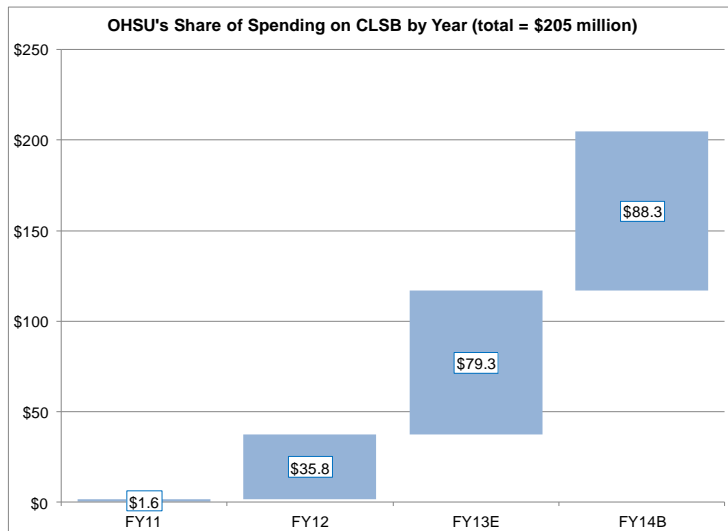
OHSU Annual Capital Budget: \$150M

Allocation of FY14 Annual Capital Budget (total = \$150 million)



Proposed Capital Budget: CLSB

- Annual capital does not include the Collaborative Life Sciences Building, which is on time and on budget to its June 2014 opening. OHSU expects to spend the remaining \$88 million of our \$205 million share of the project budget in FY14.
- OHSU's \$205 million share is funded from the \$40 million anonymous gift, \$30 million in OUS bonds, \$85 million of OHSU debt issued last year, and \$50 million in School of Dentistry gifts and retained earnings, including funds advanced from Foundation current funds against existing pledges.



FY14 Capital Budget: Detail by Area

FY14 OHSU Annual Capital Budget (000)

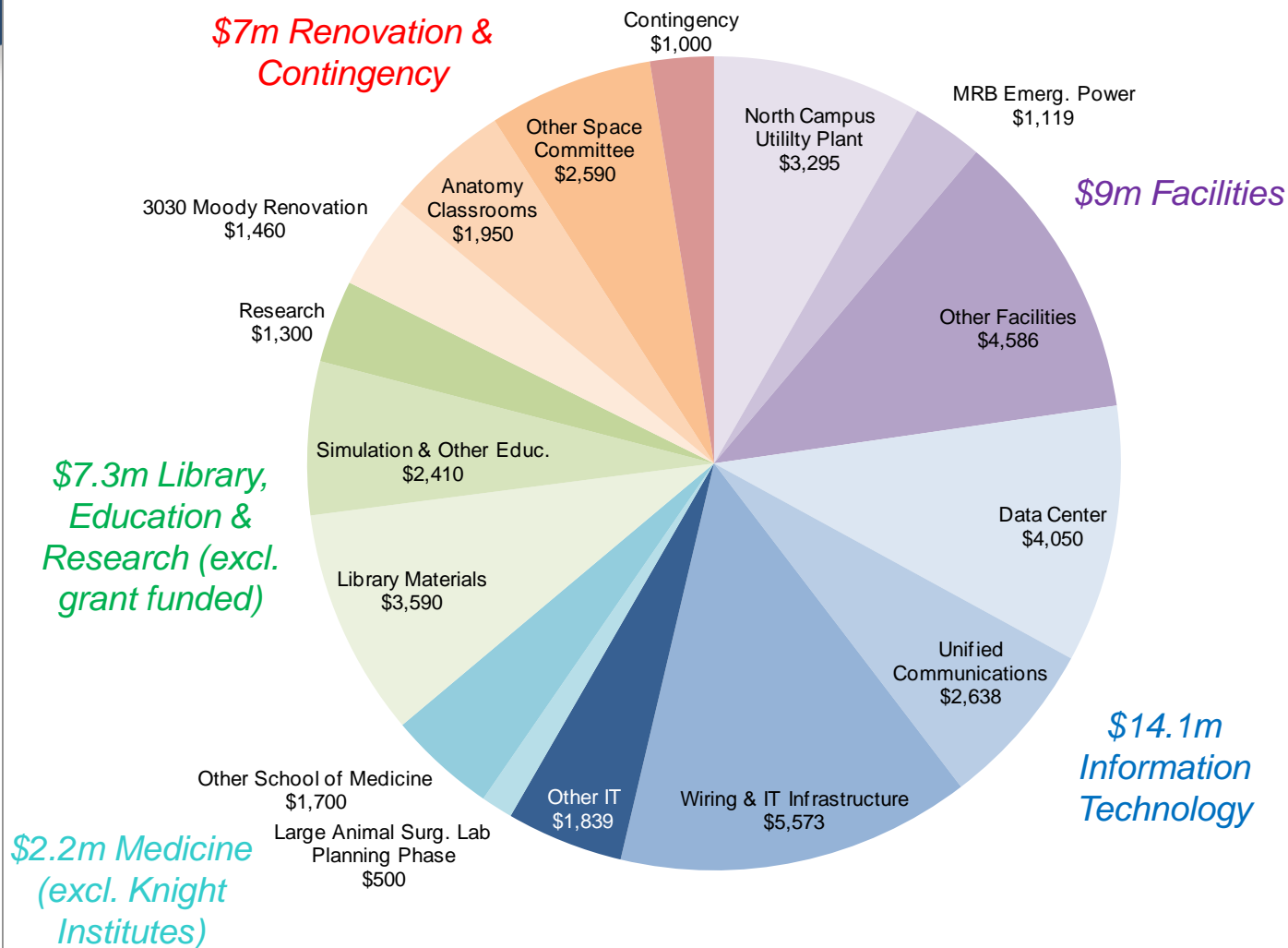
Facilities:		Knight Cancer Institute:	
North Campus Utility Plant	\$3,295	Discovery Engine	\$2,005
Deferred maintenance	1,843	Diagnostic Labs	1,080
Electrical infrastructure, MRB e-power	1,119	Bioblibrary	660
Roadway & parking repair pool	650	Program and Support	1,255
MP boiler replacement	600		
Elevator replacement pool	500	Subtotal - Knight Cancer Institute	5,000
Other capital initiatives	993		
Subtotal - Facilities	9,000	Knight Cardiovascular Institute	8,400
		(animal imaging & other equipment)	
Information Technology Group:		Estimated spending from grants	14,000
Secondary Data Center	\$4,050		
Building network wiring	3,200	Total University Non-Hospital Capital	67,000
Unified Communication	2,638		
Mission critical infrastructure	2,373	Hospital:	
Enterprise Management Decision Support	923	Multi-year projects	34,615
Banner System	547	New strategic priorities	9,938
Other capital initiatives	369	Equipment, IT & other replacement	30,599
Subtotal - ITG	14,100	Contingency/discretionary	7,848
		Hospital Capital	83,000
University Academic:		Total OHSU FY14 Capital Budget	\$150,000
Library/Provost	\$6,000		
School of Medicine	2,700		
Research	1,300		
Space Committee	5,500		
Contingency	1,000		
Subtotal - University Academic	16,500		
Total - Other University Capital	\$39,600		

University Capital Budget Approach

- Multi-Year Projects
 - Unified Communications Project (VOIP/telephone replacement) and data wiring
 - Secondary Data Center
 - Knight Cancer Institute plus first full year of Knight Cardiovascular Institute
- New Strategic
 - North Campus Utility Plant
 - 3030 Moody tenant improvements (master lease on building at base of tram for health outcomes/community-based research group)
 - Key faculty recruitment & retention
- Replacement Strategy
 - Facility pools for deferred maintenance, seismic, electrical, roof, parking & elevators
 - Mission critical IT infrastructure (services, switches, routers), and building wiring
 - Annual allocation for library collections

Other University Capital: \$39.6M

Distribution of Other University Capital Budget (total = \$39.6 million)



Hospital Capital Budget Approach

- Multi-Year Projects
 - Hospital Bed Expansion
 - Clinical Neuro/OCTRI Remodel including additional Hospital Beds
 - Interoperative MRI
 - Way Finding
 - Consolidation of Oncology Infusion Services at Center for Health & Healing
 - Expansion of Oncology Infusion sites at Legacy Good Sam and Mt Hood campuses
- New Strategic
 - Upgrades to Hospital South, Doernbecher and North Operating Room Suites
 - Endoscopy Remodel and Expansion
 - Pharmacy IV Robotics System
- Replacement Strategy

FY14 Hospital Capital: Major Priorities

Hospital - Multi-Year Projects (000)

Hospital Bed Expansion 13th & 14th Floor	
Interoperative MRI	\$10,200
Clinical Neuro/OCTRI Remodel	4,000
Way Finding	3,408
Consolidation of Oncology Infusion Services at CHH	1,500
Expansion of Oncology Infusion sites at LHS campuses	4,400
Other	1,577
Subtotal - multi-year projects	<u>1,641</u>
	26,726

Hospital - New Strategic

Upgrades to Operating Rooms in South, Doernbecher & North	
Intra-operative spine imaging system	2,183
CT Scanner Upgrades	1,181
Endoscopy Remodel and Expansion	1,005
Interactive patient system	935
Pharmacy IV robotics systems	500
Other	427
Subtotal - strategic projects	<u>3,707</u>
	\$9,938

Hospital - Replacement Strategy

Facilities (electrical infrastructure, roofs, elevators, etc.)	\$10,639
Information Technology	6,461
Professional Services - Imaging, Laboratory and Pharmacy	5,419
Adult Nursing Services	3,176
Oncology Services	2,478
Doernbecher	1,161
Ambulatory Care Services	1,022
Other	<u>244</u>
Subtotal - replacement	30,600

Hospital - Discretionary/Contingency 7,847

Hospital Share of Split-Funded IT Projects 7,889

Total Hospital Capital Budget \$83,000

Key Focus Areas to Manage in FY14 Budget

- Securing hospital capacity for further 5 – 6% growth in patient activity, through lower length of stay with higher case mix index, increased high-tech ambulatory capacity and expanded partnership strategies
- Scaling variable components of research enterprise to lower levels of grant funding
- Completing implementation of PwC/productivity & process redesign efforts throughout the university, on an accelerated time line
- Implementing the Knight Cardiovascular Institute plan
- Managing transition to CLSB for mid-June 2014 opening
- Continued uncertainty in public policy, especially federal budget
- Developing a more integrated approach to OHSU's budget, including a “faculty outward” look that starts with unified and consistent expectations for faculty effort, compensation and support costs across OHSU
- In view of the financial landscape ahead, the cautionary belt-tightening implemented earlier this year will help OHSU manage these risks from a strong financial foundation

OHSU 2013-2014 Academic Year Fee Book

Draft
6/27/2013

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Dietetic Intern, Master of Science in Clinical Nutrition or Master of Clinical Dietetics
2013-14 Tuition & Fee Charges By Term

Draft 6/27/2013

	Tuition		University	Student	Dental	Major Medical	Total Charges	
	Residents	Non-Residents	Fee	Council Fee	Insurance**	Insurance**	Residents	Non-Residents
Full-Time								
9 credit hours	6,300.00	6,300.00	542.50	14.00	89.32	1,180.36	8,126.18	8,126.18
Part-Time								
1 credit hour	700.00	700.00	275.50	0.00	89.32	1,180.36	2,245.18	2,245.18
2 credit hours	1,400.00	1,400.00	275.50	0.00	89.32	1,180.36	2,945.18	2,945.18
3 credit hours	2,100.00	2,100.00	275.50	0.00	89.32	1,180.36	3,645.18	3,645.18
4 credit hours	2,800.00	2,800.00	275.50	0.00	89.32	1,180.36	4,345.18	4,345.18
5 credit hours	3,500.00	3,500.00	275.50	0.00	89.32	1,180.36	5,045.18	5,045.18
6 credit hours	4,200.00	4,200.00	275.50	0.00	89.32	1,180.36	5,745.18	5,745.18
7 credit hours	4,900.00	4,900.00	275.50	0.00	89.32	1,180.36	6,445.18	6,445.18
8 credit hours	5,600.00	5,600.00	275.50	0.00	89.32	1,180.36	7,145.18	7,145.18
Over-Time								
Each Additional Hour*	700.00	700.00						

NOTES:

*A tuition plateau of \$8400 exists for credit hours 12 through 16. Students will be charged the per credit hour rate for all credits taken above 16 during a term.

**OHSU requires students to carry major group health/dental insurance. For students with other major group health coverage, an insurance waiver application is available. For waiver application information and deadlines, refer to the JBT Health & Wellness Center website (www.ohsu.edu/jbt-health).

**The Major Medical/Dental rates represent 4 months of coverage. Fall, Winter and Spring term rates for Dietetic Interns are Major Medical = \$885.27 and Dental = \$66.99 and coverage ends June 30, 2014. Fall term rates for Coordinated Masters students that attended Summer 2013 are Major Medical = \$885.27 and Dental = \$66.99. Insurance coverage for Masters students ends August 31, 2014. Summer 2014 rates for new students will be determined according to the 2014-2015 Academic Calendar.

Physician Assistant
2013-2014 Tuition and Fees by Term

Draft 6/27/2013

	Tuition		University	Student	Dental	Major Medical	Total Charges	
	Residents	Non-Residents	Fee	Council Fee	Insurance*	Insurance*	Residents	Non-Residents
Full-Time (9 or more credit hrs)	8,712.00	8,712.00	542.50	14.00	66.99	885.27	10,220.76	10,220.76
Part-Time								
1 credit hour	968.00	968.00	275.50	0.00	66.99	885.27	2,195.76	2,195.76
2 credit hours	1,936.00	1,936.00	275.50	0.00	66.99	885.27	3,163.76	3,163.76
3 credit hours	2,904.00	2,904.00	275.50	0.00	66.99	885.27	4,131.76	4,131.76
4 credit hours	3,872.00	3,872.00	275.50	0.00	66.99	885.27	5,099.76	5,099.76
5 credit hours	4,840.00	4,840.00	275.50	0.00	66.99	885.27	6,067.76	6,067.76
6 credit hours	5,808.00	5,808.00	275.50	0.00	66.99	885.27	7,035.76	7,035.76
7 credit hours	6,776.00	6,776.00	275.50	0.00	66.99	885.27	8,003.76	8,003.76
8 credit hours	7,744.00	7,744.00	275.50	0.00	66.99	885.27	8,971.76	8,971.76
Per Credit Hour	968.00	968.00						

Physician Assistant is a flat fee lock step program and not available on a per credit hour basis. Students attend a total of 9 terms over two academic years of attendance. For students requiring remediation (approval by the Program Director required) tuition and fees will be based on the above graduated scale for part-time attendance.

NOTES:

*OHSU requires students to carry major group health/dental insurance. For students with other major group health coverage, an insurance waiver application is available. For waiver application information and deadlines, refer to the JBT Health & Wellness Center website (www.ohsu.edu/jbt-health).

*The Major Medical/Dental rates represent 3 months of coverage. Summer 2014 rates for all students will be determined according to the 2014-2015 Academic Calendar.

Radiation Therapy Technology

2013-2014 Tuition & Fee Charges By Term

Draft

6/27/2013

	Tuition		University	Student	Dental	Major Medical	Total Charges	
	Residents	Non-Residents	Fee	Council Fee	Insurance*	Insurance*	Residents	Non-Residents
Full-Time								
12-18 credit hours	5,256.00	6,336.00	542.50	14.00	66.99	885.27	6,764.76	7,844.76
Part-Time								
1 credit hour	438.00	528.00	275.50	0.00	66.99	885.27	1,665.76	1,755.76
2 credit hours	876.00	1,056.00	275.50	0.00	66.99	885.27	2,103.76	2,283.76
3 credit hours	1,314.00	1,584.00	275.50	0.00	66.99	885.27	2,541.76	2,811.76
4 credit hours	1,752.00	2,112.00	275.50	0.00	66.99	885.27	2,979.76	3,339.76
5 credit hours	2,190.00	2,640.00	275.50	0.00	66.99	885.27	3,417.76	3,867.76
6 credit hours	2,628.00	3,168.00	275.50	0.00	66.99	885.27	3,855.76	4,395.76
7 credit hours	3,066.00	3,696.00	275.50	0.00	66.99	885.27	4,293.76	4,923.76
8 credit hours	3,504.00	4,224.00	275.50	0.00	66.99	885.27	4,731.76	5,451.76
9 credit hours	3,942.00	4,752.00	275.50	0.00	66.99	885.27	5,169.76	5,979.76
10 credit hours	4,380.00	5,280.00	275.50	0.00	66.99	885.27	5,607.76	6,507.76
11 credit hours	4,818.00	5,808.00	275.50	0.00	66.99	885.27	6,045.76	7,035.76
Over-Time								
Each Additional Hour	438.00	528.00						

NOTES:

*OHSU requires students to carry major group health/dental insurance. For students with other major group health coverage, an insurance waiver application is available. For waiver application information and deadlines, refer to the JBT Health & Wellness Center website (www.ohsu.edu/jbt-health).

*The Major Medical/Dental rates represent 3 months of coverage. Summer 2014 rates for all students will be determined according to the 2014-2015 Academic Calendar.

DMD or Graduate Dental
2013-2014 Tuition & Fee Charges by Term

Draft

6/27/2013

Tuition		University Fee	Student Council Fee	Dental Insurance*	Major Medical Insurance*	Total Charges	
Residents	Non-Residents					Residents	Non-Residents

DENTAL

Full-Time (9 or more credit hours)

1st & 2nd Years	11,585.00	18,716.00	560.50	14.00	66.99	885.27	13,111.76	20,242.76
3rd Year	11,511.00	18,642.00	560.50	14.00	66.99	885.27	13,037.76	20,168.76
4th Year	11,136.00	18,397.00	560.50	14.00	66.99	885.27	12,662.76	19,923.76

Students needing to finish graduation requirements during Summer 2014 or beyond will be charged full tuition and fees for every subsequent term enrolled until all graduation requirements have been completed.

Dentistry is a flat fee lock-step program and not available on a part-time basis unless approved by the Dean for unusual circumstances.

GRADUATE DENTAL (Masters and Advanced Specialty Programs)

All Years	9,975.00	12,115.00	560.50	14.00	66.99	885.27	11,501.76	13,641.76
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NOTES:

*OHSU requires students to carry major group health/dental insurance. For students with other major group health coverage, an insurance waiver application is available. For waiver application information and deadlines, refer to the JBT Health & Wellness Center website (www.ohsu.edu/jbt-health).

*The Major Medical/Dental rates represent 3 months of coverage. The Fall term rates for 2nd through 4th year DMD students are Major Medical = \$1,180.36 and Dental = \$89.32. Summer 2014 rates for all students will be determined according to the 2014-2015 Academic Calendar.

MD
2013-2014 Tuition & Fee Charges By Term

Draft 6/27/2013

	Tuition		University	Student	Dental	Major Medical	Total Charges	
	Residents	Non-Residents	Fee	Council Fee	Insurance*	Insurance*	Residents	Non-Residents
Full-Time (9 or more credit hours)								
1st and 2nd year	9,607.00	13,399.00	542.50	14.00	66.99	885.27	11,115.76	14,907.76
3rd and 4th year	9,607.00	13,399.00	560.50	14.00	66.99	885.27	11,133.76	14,925.76
Part-Time								
1 credit (seminar)	60.00	60.00	0.00	0.00	0.00	0.00	60.00	60.00

The M.D. program is a fixed fee, continuity program and is not available on a part-time basis, unless approved by the Program Director for unusual circumstances. Students are responsible for paying full tuition and fees for four terms annually.

NOTES:

*OHSU requires students to carry major group health/dental insurance. For students with other major group health coverage, an insurance waiver application is available. For waiver application information and deadlines, refer to the JBT Health & Wellness Center website (www.ohsu.edu/jbt-health).

*The Major Medical/Dental rates represent 3 months of coverage.

Spring term rates for 1st year students are Major Medical = \$1,180.36, Dental = \$89.32 and coverage ends July 31, 2014.

Spring term rates for 4th year and 5th year students are Major Medical = \$1,180.36, Dental = \$89.32 and coverage ends June 30, 2014.

Fall term rates for MD/MPH students are Major Medical = \$1,180.36 and Dental = \$89.32.

Summer 2014 rates for all students will be determined according to the 2014-2015 Academic Calendar.

School of Medicine Basic Science PhD
2013-2014 Tuition & Fee Charges By Term

Draft 6/27/2013

	Tuition		University	Student	Dental	Major Medical	Total Charges	
	Residents	Non-Residents	Fee	Council Fee	Insurance*	Insurance*	Residents	Non-Residents
9 credit hours	6,767.00	6,767.00	542.50	14.00	89.32	1,180.36	8,593.18	8,593.18
Per credit								
1 credit hour	912.00	912.00	275.50	0.00	89.32	1,180.36	2,457.18	2,457.18
2 credit hours	1,642.00	1,642.00	275.50	0.00	89.32	1,180.36	3,187.18	3,187.18
3 credit hours	2,372.00	2,372.00	275.50	0.00	89.32	1,180.36	3,917.18	3,917.18
4 credit hours	3,102.00	3,102.00	275.50	0.00	89.32	1,180.36	4,647.18	4,647.18
5 credit hours	3,832.00	3,832.00	275.50	0.00	89.32	1,180.36	5,377.18	5,377.18
6 credit hours	4,562.00	4,562.00	275.50	0.00	89.32	1,180.36	6,107.18	6,107.18
7 credit hours	5,292.00	5,292.00	275.50	0.00	89.32	1,180.36	6,837.18	6,837.18
8 credit hours	6,022.00	6,022.00	275.50	0.00	89.32	1,180.36	7,567.18	7,567.18
Over-Time								
Each additional hour	730.00	730.00						

NOTES:

*OHSU requires students to carry major group health/dental insurance. For students with other major group health coverage, an insurance waiver application is available. For waiver application information and deadlines, refer to the JBT Health & Wellness Center website (www.ohsu.edu/jbt-health).

*The Major Medical/Dental rates represent 4 months of coverage. Insurance coverage ends August 31, 2014. The Fall term rates for new students who start in Summer 2013 are Major Medical = \$885.27 and Dental = \$66.99. Summer 2014 rates for new students will be determined according to the 2014-2015 Academic Calendar.

School of Medicine Master of Public Health or Graduate Programs in Biostatistics
2013-2014 Tuition & Fee Charges By Term

Draft

6/27/2013

	Tuition		University	Student	Dental	Major Medical	Total Charges	
	Residents	Non-Residents	Fee	Council Fee	Insurance*	Insurance*	Residents	Non-Residents
9 credit hours	3,165.00	4,965.00	542.50	14.00	89.32	1,180.36	4,991.18	6,791.18
Per credit								
1 credit hour	350.00	550.00	275.50	0.00	89.32	1,180.36	1,895.18	2,095.18
2 credit hours	700.00	1,100.00	275.50	0.00	89.32	1,180.36	2,245.18	2,645.18
3 credit hours	1,050.00	1,650.00	275.50	0.00	89.32	1,180.36	2,595.18	3,195.18
4 credit hours	1,400.00	2,200.00	275.50	0.00	89.32	1,180.36	2,945.18	3,745.18
5 credit hours	1,750.00	2,750.00	275.50	0.00	89.32	1,180.36	3,295.18	4,295.18
6 credit hours	2,100.00	3,300.00	275.50	0.00	89.32	1,180.36	3,645.18	4,845.18
7 credit hours	2,450.00	3,850.00	275.50	0.00	89.32	1,180.36	3,995.18	5,395.18
8 credit hours	2,800.00	4,400.00	275.50	0.00	89.32	1,180.36	4,345.18	5,945.18
Over-Time								
Each additional hour	350.00	550.00						

NOTES:

*OHSU requires students to carry major group health/dental insurance. For students with other major group health coverage, an insurance waiver application is available. For waiver application information and deadlines, refer to the JBT Health & Wellness Center website (www.ohsu.edu/jbt-health).

*The Major Medical/Dental rates represent 4 months of coverage. Insurance coverage ends August 31, 2014. The Fall term rates for new students who start in Summer 2013 are Major Medical = \$885.27 and Dental = \$66.99. For MD/MPH students who are working on the MPH, the Winter and Spring term rates are Major Medical = \$885.27, Dental = \$66.99 and the insurance coverage ends June 30, 2014. Summer 2014 rates for new students will be determined according to the 2014-2015 Academic Calendar.

Biomedical Informatics
2013-2014 Tuition & Fee Charges By Term

Draft 6/27/2013

Tuition*		University Fee	Student Council Fee	Dental Insurance**	Major Medical Insurance**	Total Charges	
Residents	Non-Residents					Residents	Non-Residents

On Campus Students

9 credit hours	5,343.00	6,135.00	542.50	14.00	89.32	1,180.36	7,169.18	7,961.18
Per credit								
1 credit hour	592.00	680.00	275.50	0.00	89.32	1,180.36	2,137.18	2,225.18
2 credit hours	1,184.00	1,360.00	275.50	0.00	89.32	1,180.36	2,729.18	2,905.18
3 credit hours	1,776.00	2,040.00	275.50	0.00	89.32	1,180.36	3,321.18	3,585.18
4 credit hours	2,368.00	2,720.00	275.50	0.00	89.32	1,180.36	3,913.18	4,265.18
5 credit hours	2,960.00	3,400.00	275.50	0.00	89.32	1,180.36	4,505.18	4,945.18
6 credit hours	3,552.00	4,080.00	275.50	0.00	89.32	1,180.36	5,097.18	5,625.18
7 credit hours	4,144.00	4,760.00	275.50	0.00	89.32	1,180.36	5,689.18	6,305.18
8 credit hours	4,736.00	5,440.00	275.50	0.00	89.32	1,180.36	6,281.18	6,985.18
Over-Time								
Each additional hour	592.00	680.00						

All Distance Learning Students

9 credit hours	5,949.00	6,786.00	0.00	0.00	0.00	0.00	5,949.00	6,786.00
Per credit								
1 credit hour	661.00	754.00	0.00	0.00	0.00	0.00	661.00	754.00
2 credit hours	1,322.00	1,508.00	0.00	0.00	0.00	0.00	1,322.00	1,508.00
3 credit hours	1,983.00	2,262.00	0.00	0.00	0.00	0.00	1,983.00	2,262.00
4 credit hours	2,644.00	3,016.00	0.00	0.00	0.00	0.00	2,644.00	3,016.00
5 credit hours	3,305.00	3,770.00	0.00	0.00	0.00	0.00	3,305.00	3,770.00
6 credit hours	3,966.00	4,524.00	0.00	0.00	0.00	0.00	3,966.00	4,524.00
7 credit hours	4,627.00	5,278.00	0.00	0.00	0.00	0.00	4,627.00	5,278.00
8 credit hours	5,288.00	6,032.00	0.00	0.00	0.00	0.00	5,288.00	6,032.00
Over-Time								
Each additional hour	661.00	754.00						

NOTES:

*Eligible members of organizations that have signed a tuition discount agreement with OHSU will receive a 5% tuition discount for the Graduate Certificate in Biomedical Informatics program.

**OHSU requires students to carry major group health/dental insurance. For students with other major group health coverage, an insurance waiver application is available. For waiver application information and deadlines, refer to the JBT Health & Wellness Center website (www.ohsu.edu/jbt-health).

**The Major Medical/Dental rates represent 4 months of coverage and coverage ends August 31, 2014. The Fall term rates for new students who start in Summer 2013 are Major Medical = \$885.27 and Dental = \$66.99. Summer 2014 rates for new students will be determined according to the 2014-2015 Academic Calendar.

Master of Clinical Research, Certificate in Human Investigations or Health Sciences Technology Entrepreneurship Certificate

2013-2014 Tuition & Fee Charges By Term

Draft 6/27/2013

	Tuition*		University Fee	Student Council Fee	Total Charges	
	Residents	Non-Residents			Residents	Non-Residents
9 credit hours	4,515.00	4,515.00	285.50	14.00	4,814.50	4,814.50
Per credit						
1 credit hour	500.00	500.00	18.50	0.00	518.50	518.50
2 credit hours	1,000.00	1,000.00	18.50	0.00	1,018.50	1,018.50
3 credit hours	1,500.00	1,500.00	18.50	0.00	1,518.50	1,518.50
4 credit hours	2,000.00	2,000.00	18.50	0.00	2,018.50	2,018.50
5 credit hours	2,500.00	2,500.00	18.50	0.00	2,518.50	2,518.50
6 credit hours	3,000.00	3,000.00	18.50	0.00	3,018.50	3,018.50
7 credit hours	3,500.00	3,500.00	18.50	0.00	3,518.50	3,518.50
8 credit hours	4,000.00	4,000.00	18.50	0.00	4,018.50	4,018.50
Over-Time						
Each additional hour	500.00	500.00				

NOTES:

*Certain courses with HIP Subject Codes will not be charged the per credit tuition amount. For a listing of the current tuition exempt courses, refer to the [program website](#).

**Biomedical Engineering, Computer Science & Engineering, Electrical Engineering, Biochemistry & Molecular Biology or
Environmental Science & Engineering
2013-2014 Tuition & Fee Charges By Term**

Draft 6/27/2013

Tuition*		University Fee	Student Council Fee	Dental Insurance**	Major Medical Insurance**	Total Charges	
Residents	Non-Residents					Residents	Non-Residents

Full-Time PhD students

9+ credit hours	6,767.00	6,767.00	302.50	14.00	89.32	1,180.36	8,353.18	8,353.18
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Part-Time

1 credit hour	912.00	912.00	275.50	0.00	89.32	1,180.36	2,457.18	2,457.18
2 credit hours	1,642.00	1,642.00	275.50	0.00	89.32	1,180.36	3,187.18	3,187.18
3 credit hours	2,372.00	2,372.00	275.50	0.00	89.32	1,180.36	3,917.18	3,917.18
4 credit hours	3,102.00	3,102.00	275.50	0.00	89.32	1,180.36	4,647.18	4,647.18
5 credit hours	3,832.00	3,832.00	275.50	0.00	89.32	1,180.36	5,377.18	5,377.18
6 credit hours	4,562.00	4,562.00	275.50	0.00	89.32	1,180.36	6,107.18	6,107.18
7 credit hours	5,292.00	5,292.00	275.50	0.00	89.32	1,180.36	6,837.18	6,837.18
8 credit hours	6,022.00	6,022.00	275.50	0.00	89.32	1,180.36	7,567.18	7,567.18

Full-Time Masters Students

9-12 credit hours*	6,045.00	6,045.00	302.50	14.00	89.32	1,180.36	7,631.18	7,631.18
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Part-Time

1 credit hour	670.00	670.00	275.50	0.00	89.32	1,180.36	2,215.18	2,215.18
2 credit hours	1,340.00	1,340.00	275.50	0.00	89.32	1,180.36	2,885.18	2,885.18
3 credit hours	2,010.00	2,010.00	275.50	0.00	89.32	1,180.36	3,555.18	3,555.18
4 credit hours	2,680.00	2,680.00	275.50	0.00	89.32	1,180.36	4,225.18	4,225.18
5 credit hours	3,350.00	3,350.00	275.50	0.00	89.32	1,180.36	4,895.18	4,895.18
6 credit hours	4,020.00	4,020.00	275.50	0.00	89.32	1,180.36	5,565.18	5,565.18
7 credit hours	4,690.00	4,690.00	275.50	0.00	89.32	1,180.36	6,235.18	6,235.18
8 credit hours	5,360.00	5,360.00	275.50	0.00	89.32	1,180.36	6,905.18	6,905.18

Over-Time

Each additional hour	670.00	670.00						
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NOTES:

*Master degree students in either Computer Science & Engineering or Electrical Engineering taking more than 9 credit hours in a term will pay \$670 in tuition for each credit hour.

*Non-matriculated students taking more than 9 credit hours in a term will pay \$670 in tuition for each credit hour.

**OHSU requires students to carry major group health/dental insurance. For students with other major group health coverage, an insurance waiver application is available. For waiver application information and deadlines, refer to the JBT Health & Wellness Center website (www.ohsu.edu/jbt-health).

**The Major Medical/Dental rates represent 4 months of coverage and coverage ends August 31, 2014. Fall term rates for new students who start in Summer 2013 are Major Medical = \$885.27 and Dental = \$66.99. Summer 2014 rates for new students will be based on the 2014-2015 Academic Calendar.

**Master of Science in Healthcare Management, Certificate in Healthcare Management or Master of Business
Administration in Healthcare Management
2013-2014 Tuition & Fee Charges By Term**

Draft 6/27/2013

	Tuition		University Fee	Student Council Fee	Total Charges	
	Residents	Non-Residents			Residents	Non-Residents
9 credit hours	4,965.00	4,965.00	285.50	14.00	5,264.50	5,264.50
Part-Time						
1 credit hour	550.00	550.00	18.50	0.00	568.50	568.50
2 credit hours	1,100.00	1,100.00	18.50	0.00	1,118.50	1,118.50
3 credit hours	1,650.00	1,650.00	18.50	0.00	1,668.50	1,668.50
4 credit hours	2,200.00	2,200.00	18.50	0.00	2,218.50	2,218.50
5 credit hours	2,750.00	2,750.00	18.50	0.00	2,768.50	2,768.50
6 credit hours	3,300.00	3,300.00	18.50	0.00	3,318.50	3,318.50
7 credit hours	3,850.00	3,850.00	18.50	0.00	3,868.50	3,868.50
8 credit hours	4,400.00	4,400.00	18.50	0.00	4,418.50	4,418.50
Over-Time						
Each additional hour	550.00	550.00				

Undergraduate Nursing Accelerated Bachelor of Science
2013-2014 Tuition & Fee Charges By Term

Draft 6/27/2013

	Tuition*		University	Student	Dental	Major Medical	Total Charges	
	Residents	Non-Residents	Fee	Council Fee	Insurance**	Insurance**	Residents	Non-Residents
12 credit hours	5,580.00	7,452.00	542.50	14.00	66.99	885.27	7,088.76	8,960.76
Per Credit								
1 credit hour	465.00	621.00	275.50	0.00	66.99	885.27	1,692.76	1,848.76
2 credit hours	930.00	1,242.00	275.50	0.00	66.99	885.27	2,157.76	2,469.76
3 credit hours	1,395.00	1,863.00	275.50	0.00	66.99	885.27	2,622.76	3,090.76
4 credit hours	1,860.00	2,484.00	275.50	0.00	66.99	885.27	3,087.76	3,711.76
5 credit hours	2,325.00	3,105.00	275.50	0.00	66.99	885.27	3,552.76	4,332.76
6 credit hours	2,790.00	3,726.00	275.50	0.00	66.99	885.27	4,017.76	4,953.76
7 credit hours	3,255.00	4,347.00	275.50	0.00	66.99	885.27	4,482.76	5,574.76
8 credit hours	3,720.00	4,968.00	275.50	0.00	66.99	885.27	4,947.76	6,195.76
9 credit hours	4,185.00	5,589.00	275.50	0.00	66.99	885.27	5,412.76	6,816.76
10 credit hours	4,650.00	6,210.00	275.50	0.00	66.99	885.27	5,877.76	7,437.76
11 credit hours	5,115.00	6,831.00	275.50	0.00	66.99	885.27	6,342.76	8,058.76
Over-Time								
Each Add. Hour	465.00	621.00						

NOTES:

*Nonresident students who are residents of counties adjacent to the Oregon border in California, Idaho, Nevada or Washington pay Resident Tuition. Eligible students must notify the Registrar's Office by the first day of the academic term. Tuition for terms prior to the date the student notifies the Registrar's Office will continue to be charged at the nonresident rate.

*New Accelerated Bachelor of Science students who start in Summer 2014 will be charged Summer 2014 tuition from the 2014-2015 Academic Year Fee Book.

*Students enrolled in the Accelerated Bachelor of Science to Master's or DNP programs pay tuition and fees at the rates shown in this table during the first five terms of their program of study. Thereafter, these students' tuition and fees are assessed based on the fee schedule for the graduate program.

**OHSU requires students to carry major group health/dental insurance. For students with other major group health coverage, an insurance waiver application is available. For waiver application information and deadlines, refer to the JBT Health & Wellness Center website (www.ohsu.edu/jbt-health).

**The Major Medical/Dental rates represent 3 months of coverage and coverage ends June 30, 2014. Fall term rates for students admitted Fall 2013 are Major Medical = \$1,180.36 and Dental = \$89.32. Summer 2014 rates will be determined according to the 2014-2015 Academic Calendar.

Undergraduate Nursing Ashland (SOU)
2013-2014 Tuition & Fee Charges By Term

Draft 6/27/2013

	Tuition*		Dental Insurance**	Major Medical Insurance**	Total Charges	
	Residents	Non-Residents			Residents	Non-Residents
12 credit hours	4,044.00	7,404.00	89.32	1,180.36	5,313.68	8,673.68
Per Credit						
1 credit hour	337.00	617.00	89.32	1,180.36	1,606.68	1,886.68
2 credit hours	674.00	1,234.00	89.32	1,180.36	1,943.68	2,503.68
3 credit hours	1,011.00	1,851.00	89.32	1,180.36	2,280.68	3,120.68
4 credit hours	1,348.00	2,468.00	89.32	1,180.36	2,617.68	3,737.68
5 credit hours	1,685.00	3,085.00	89.32	1,180.36	2,954.68	4,354.68
6 credit hours	2,022.00	3,702.00	89.32	1,180.36	3,291.68	4,971.68
7 credit hours	2,359.00	4,319.00	89.32	1,180.36	3,628.68	5,588.68
8 credit hours	2,696.00	4,936.00	89.32	1,180.36	3,965.68	6,205.68
9 credit hours	3,033.00	5,553.00	89.32	1,180.36	4,302.68	6,822.68
10 credit hours	3,370.00	6,170.00	89.32	1,180.36	4,639.68	7,439.68
11 credit hours	3,707.00	6,787.00	89.32	1,180.36	4,976.68	8,056.68
Over-Time						
Each Add. Hour	337.00	617.00				

NOTES:

*Nonresident students who are residents of counties adjacent to the Oregon border in California, Idaho, Nevada or Washington pay Resident Tuition. Eligible students must notify the Registrar's Office by the first day of the academic term. Tuition for terms prior to the date the student notifies the Registrar's Office will continue to be charged at the nonresident rate.

*A SOU Building Fee of up to \$45, a SOU Incidental Fee of up to \$301 and a SOU Health Service Fee of up to \$119 will be billed by SOU and students pay these fees directly to SOU. A \$300 one-time matriculation Fee will be assessed by SOU to all nursing students who have not previously paid the SOU Matriculation Fee. All of the SOU fee amounts listed represent estimated rates, the actual charges may differ and will be based on the OUS 2013-2014 Academic Year Fee Book.

**OHSU requires students to carry major group health/dental insurance. For students with other major group health coverage, an insurance waiver application is available. For waiver application information and deadlines, refer to the JBT Health & Wellness Center website (www.ohsu.edu/jbt-health).

**The Major Medical/Dental rates represent 4 months of coverage. Coverage ends August 31, 2014. The Winter and Spring term rates for students in the final year of the curriculum are Major Medical = \$885.27, Dental = \$66.99 and coverage ends June 30, 2014.

Students who have been enrolled at a community college program in the OCNE curriculum are required to pay a one-time processing fee of \$120 at the time the student notifies OHSU of intent to matriculate to 400-level coursework at OHSU.

Undergraduate Nursing Klamath Falls (OIT)
2013-2014 Tuition & Fee Charges By Term

Draft 6/27/2013

	Tuition*		Dental Insurance**	Major Medical Insurance**	Total Charges	
	Residents	Non-Residents			Residents	Non-Residents
12 credit hours	4,044.00	7,404.00	89.32	1,180.36	5,313.68	8,673.68
Per Credit						
1 credit hour	337.00	617.00	89.32	1,180.36	1,606.68	1,886.68
2 credit hours	674.00	1,234.00	89.32	1,180.36	1,943.68	2,503.68
3 credit hours	1,011.00	1,851.00	89.32	1,180.36	2,280.68	3,120.68
4 credit hours	1,348.00	2,468.00	89.32	1,180.36	2,617.68	3,737.68
5 credit hours	1,685.00	3,085.00	89.32	1,180.36	2,954.68	4,354.68
6 credit hours	2,022.00	3,702.00	89.32	1,180.36	3,291.68	4,971.68
7 credit hours	2,359.00	4,319.00	89.32	1,180.36	3,628.68	5,588.68
8 credit hours	2,696.00	4,936.00	89.32	1,180.36	3,965.68	6,205.68
9 credit hours	3,033.00	5,553.00	89.32	1,180.36	4,302.68	6,822.68
10 credit hours	3,370.00	6,170.00	89.32	1,180.36	4,639.68	7,439.68
11 credit hours	3,707.00	6,787.00	89.32	1,180.36	4,976.68	8,056.68
Over-Time						
Each Add. Hour	337.00	617.00				

NOTES:

*Nonresident students who are residents of counties adjacent to the Oregon border in California, Idaho, Nevada or Washington pay Resident Tuition. Eligible students must notify the Registrar's Office by the first day of the academic term. Tuition for terms prior to the date the student notifies the Registrar's Office will continue to be charged at the nonresident rate.

*An OIT Building Fee of up to \$45, an OIT Incidental Fee of up to \$295 and and OIT Health Service Fee of up to \$150 will be charged by OIT and students pay these fees directly to OIT. A \$150 one-time OIT Matriculation Fee and a \$40 one-time Transcript for Life Fee will be assessed by OIT to all nursing students who have not previously paid the OIT Matriculation or Transcript for Life Fees and who become admitted to OIT. All of the OIT fee amounts listed represent estimated rates, the actual charges may differ and will be based on the OUS 2013-2014 Academic Year Fee Book.

**OHSU requires students to carry major group health/dental insurance. For students with other major group health coverage, an insurance waiver application is available. For waiver application information and deadlines, refer to the JBT Health & Wellness Center website (www.ohsu.edu/jbt-health).

**The Major Medical/Dental rates represent 4 months of coverage. Coverage ends August 31, 2014. The Winter and Spring term rates for students in the final year of the curriculum are Major Medical = \$885.27, Dental = \$66.99 and coverage ends June 30, 2014.

Undergraduate Nursing La Grande (EOU)
2013-2014 Tuition & Fee Charges By Term

Draft 6/27/2013

	Tuition*		Dental Insurance**	Major Medical Insurance**	Total Charges	
	Residents	Non-Residents			Residents	Non-Residents
12 credit hours	4,044.00	7,404.00	89.32	1,180.36	5,313.68	8,673.68
Per Credit						
1 credit hour	337.00	617.00	89.32	1,180.36	1,606.68	1,886.68
2 credit hours	674.00	1,234.00	89.32	1,180.36	1,943.68	2,503.68
3 credit hours	1,011.00	1,851.00	89.32	1,180.36	2,280.68	3,120.68
4 credit hours	1,348.00	2,468.00	89.32	1,180.36	2,617.68	3,737.68
5 credit hours	1,685.00	3,085.00	89.32	1,180.36	2,954.68	4,354.68
6 credit hours	2,022.00	3,702.00	89.32	1,180.36	3,291.68	4,971.68
7 credit hours	2,359.00	4,319.00	89.32	1,180.36	3,628.68	5,588.68
8 credit hours	2,696.00	4,936.00	89.32	1,180.36	3,965.68	6,205.68
9 credit hours	3,033.00	5,553.00	89.32	1,180.36	4,302.68	6,822.68
10 credit hours	3,370.00	6,170.00	89.32	1,180.36	4,639.68	7,439.68
11 credit hours	3,707.00	6,787.00	89.32	1,180.36	4,976.68	8,056.68
Over-Time						
Each Add. Hour	337.00	617.00				

NOTES:

*Nonresident nursing students are eligible for resident tuition rates if they completed at least one term at EOU prior to Summer 2012, or are residents of Idaho or Washington and have completed at least one term at EOU prior to entering the nursing program, or if they are residents of counties adjacent to the Oregon border in California, Idaho, Nevada, or Washington. Students eligible for any of these exceptions must notify the Registrar's Office by the first day of the academic term. Tuition for terms prior to the date the student notifies the Registrar's Office will continue to be charged at the nonresident rate.

*An EOU Building Fee of up to \$45, an EOU Incidental Fee of up to \$247, an EOU Health Service Fee of up to \$150 and an EOU Hoke Special Renovation Fee of up to \$28 will be charged by EOU and students pay these fees directly to EOU. A \$120 one-time EOU Matriculation Fee will be assessed by EOU to all nursing students who have not previously paid the EOU Matriculation Fee and who become admitted to EOU. All of the EOU fee amounts listed represent estimated rates, the actual charges may differ and will be based on the OUS 2013-2014 Academic Year Fee Book.

**OHSU requires students to carry major group health/dental insurance. For students with other major group health coverage, an insurance waiver application is available. For waiver application information and deadlines, refer to the JBT Health & Wellness Center website (www.ohsu.edu/jbt-health).

**The Major Medical/Dental rates represent 4 months of coverage. Coverage ends August 31, 2014. The Winter and Spring term rates for students in the final year of the curriculum are Major Medical = \$885.27, Dental = \$66.99 and coverage ends June 30, 2014.

Undergraduate Nursing Monmouth (WOU)
2013-2014 Tuition & Fee Charges By Term

Draft 6/27/2013

	Tuition*		Dental Insurance**	Major Medical Insurance**	Total Charges	
	Residents	Non-Residents			Residents	Non-Residents
12 credit hours	4,044.00	7,404.00	89.32	1,180.36	5,313.68	8,673.68
Per Credit						
1 credit hour	337.00	617.00	89.32	1,180.36	1,606.68	1,886.68
2 credit hours	674.00	1,234.00	89.32	1,180.36	1,943.68	2,503.68
3 credit hours	1,011.00	1,851.00	89.32	1,180.36	2,280.68	3,120.68
4 credit hours	1,348.00	2,468.00	89.32	1,180.36	2,617.68	3,737.68
5 credit hours	1,685.00	3,085.00	89.32	1,180.36	2,954.68	4,354.68
6 credit hours	2,022.00	3,702.00	89.32	1,180.36	3,291.68	4,971.68
7 credit hours	2,359.00	4,319.00	89.32	1,180.36	3,628.68	5,588.68
8 credit hours	2,696.00	4,936.00	89.32	1,180.36	3,965.68	6,205.68
9 credit hours	3,033.00	5,553.00	89.32	1,180.36	4,302.68	6,822.68
10 credit hours	3,370.00	6,170.00	89.32	1,180.36	4,639.68	7,439.68
11 credit hours	3,707.00	6,787.00	89.32	1,180.36	4,976.68	8,056.68
Over-Time						
Each Add. Hour	337.00	617.00				

NOTES:

*Nonresident students who are residents of counties adjacent to the Oregon border in California, Idaho, Nevada or Washington pay Resident Tuition. Eligible students must notify the Registrar's Office by the first day of the academic term. Tuition for terms prior to the date the student notifies the Registrar's Office will continue to be charged at the nonresident rate.

*A WOU Technology Fee of up to \$120, a WOU Building Fee of up to \$45, a WOU Incidental Fee of up to \$306, a WOU Rec Center Fee of up to \$42 and a WOU Health Service Fee of up to \$110 will be charged by WOU and students pay these fees directly to WOU. A \$300 one-time WOU Matriculation Fee will be assessed by WOU to all nursing students who have not previously paid the WOU Matriculation Fee while enrolled at WOU. All of the WOU fee amounts listed represent estimated rates, the actual charges may differ and will be based on the OUS 2013-2014 Academic Year Fee Book.

**OHSU requires students to carry major group health/dental insurance. For students with other major group health coverage, an insurance waiver application is available. For waiver application information and deadlines, refer to the JBT Health & Wellness Center website (www.ohsu.edu/jbt-health).

**The Major Medical/Dental rates represent 4 months of coverage. Coverage ends August 31, 2014. The Winter and Spring term rates for students in the final year of the curriculum are Major Medical = \$885.27, Dental = \$66.99 and coverage ends June 30, 2014.

Undergraduate Nursing Portland
2013-2014 Tuition & Fee Charges By Term

Draft 6/27/2013

	Tuition*		University	Student	Dental	Major Medical	Total Charges	
	Residents	Non-Residents	Fee	Council Fee	Insurance**	Insurance**	Residents	Non-Residents
12 credit hours	4,044.00	7,404.00	542.50	14.00	89.32	1,180.36	5,870.18	9,230.18
Per Credit								
1 credit hour	337.00	617.00	275.50	0.00	89.32	1,180.36	1,882.18	2,162.18
2 credit hours	674.00	1,234.00	275.50	0.00	89.32	1,180.36	2,219.18	2,779.18
3 credit hours	1,011.00	1,851.00	275.50	0.00	89.32	1,180.36	2,556.18	3,396.18
4 credit hours	1,348.00	2,468.00	275.50	0.00	89.32	1,180.36	2,893.18	4,013.18
5 credit hours	1,685.00	3,085.00	275.50	0.00	89.32	1,180.36	3,230.18	4,630.18
6 credit hours	2,022.00	3,702.00	275.50	0.00	89.32	1,180.36	3,567.18	5,247.18
7 credit hours	2,359.00	4,319.00	275.50	0.00	89.32	1,180.36	3,904.18	5,864.18
8 credit hours	2,696.00	4,936.00	275.50	0.00	89.32	1,180.36	4,241.18	6,481.18
9 credit hours	3,033.00	5,553.00	542.50	14.00	89.32	1,180.36	4,859.18	7,379.18
10 credit hours	3,370.00	6,170.00	542.50	14.00	89.32	1,180.36	5,196.18	7,996.18
11 credit hours	3,707.00	6,787.00	542.50	14.00	89.32	1,180.36	5,533.18	8,613.18
Over-Time								
Each Add. Hour	337.00	617.00						

NOTES:

*Nonresident students who are residents of counties adjacent to the Oregon border in California, Idaho, Nevada or Washington pay Resident Tuition. Eligible students must notify the Registrar's Office by the first day of the academic term. Tuition for terms prior to the date the student notifies the Registrar's Office will continue to be charged at the nonresident rate.

**OHSU requires students to carry major group health/dental insurance. For students with other major group health coverage, an insurance waiver application is available. For waiver application information and deadlines, refer to the JBT Health & Wellness Center website (www.ohsu.edu/jbt-health).

**The Major Medical/Dental rates represents 4 months of coverage. Coverage ends August 31, 2014. The Winter and Spring term rates for students in the final year of the curriculum are Major Medical = \$885.27, Dental = \$66.99 and coverage ends June 30, 2014.

Students who have been enrolled at a community college program in the OCNE curriculum are required to pay a one-time processing fee of \$120 at the time the student notifies OHSU of intent to matriculate to 400-level coursework at OHSU.

Undergraduate Nursing RN/BS
2013-2014 Tuition & Fee Charges By Term

Draft 6/27/2013

	Tuition		Total Charges	
	Residents	Non-Residents	Residents	Non-Residents
12 credit hours	5,316.00	5,316.00	5,316.00	5,316.00
Per Credit				
1 credit hour	443.00	443.00	443.00	443.00
2 credit hours	886.00	886.00	886.00	886.00
3 credit hours	1,329.00	1,329.00	1,329.00	1,329.00
4 credit hours	1,772.00	1,772.00	1,772.00	1,772.00
5 credit hours	2,215.00	2,215.00	2,215.00	2,215.00
6 credit hours	2,658.00	2,658.00	2,658.00	2,658.00
7 credit hours	3,101.00	3,101.00	3,101.00	3,101.00
8 credit hours	3,544.00	3,544.00	3,544.00	3,544.00
9 credit hours	3,987.00	3,987.00	3,987.00	3,987.00
10 credit hours	4,430.00	4,430.00	4,430.00	4,430.00
11 credit hours	4,873.00	4,873.00	4,873.00	4,873.00
Over-Time				
Each Additional Hour	443.00	443.00		

Graduate Nursing Portland
2013-2014 Tuition & Fee Charges By Term

Draft

6/27/2013

	Tuition*		University Fee	Student Council Fee	Dental Insurance**	Major Medical Insurance**	Total Charges	
	Residents	Non-Residents					Residents	Non-Residents
9 credit hours	4,905.00	6,336.00	542.50	14.00	89.32	1,180.36	6,731.18	8,162.18
Per Credit								
1 credit hour	545.00	704.00	275.50	0.00	89.32	1,180.36	2,090.18	2,249.18
2 credit hours	1,090.00	1,408.00	275.50	0.00	89.32	1,180.36	2,635.18	2,953.18
3 credit hours	1,635.00	2,112.00	275.50	0.00	89.32	1,180.36	3,180.18	3,657.18
4 credit hours	2,180.00	2,816.00	275.50	0.00	89.32	1,180.36	3,725.18	4,361.18
5 credit hours	2,725.00	3,520.00	275.50	0.00	89.32	1,180.36	4,270.18	5,065.18
6 credit hours	3,270.00	4,224.00	275.50	0.00	89.32	1,180.36	4,815.18	5,769.18
7 credit hours	3,815.00	4,928.00	275.50	0.00	89.32	1,180.36	5,360.18	6,473.18
8 credit hours	4,360.00	5,632.00	275.50	0.00	89.32	1,180.36	5,905.18	7,177.18
Over-Time								
Each Additional Hour	545.00	704.00						

NOTES:

*Nonresident students who are residents of counties adjacent to the Oregon border in California, Idaho, Nevada or Washington pay Resident Tuition. The nonresident portion of tuition is waived for Ph.D. and post-masters DNP students from states participating in the Western Regional Graduate Program of the Western Interstate Commission for Higher Education. Those states include Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, North Dakota, South Dakota, Utah, Washington and Wyoming. Students eligible for either of these exceptions must notify the Registrar's Office by the first day of the academic term. Tuition for terms prior to the date the student notifies the Registrar's Office will continue to be charged the nonresident rate.

*Students enrolled in the School of Nursing's statewide graduate programs will be billed from this fee table.

**OHSU requires students to carry major group health/dental insurance. For students with other major group health coverage, an insurance waiver application is available. For waiver application information and deadlines, refer to the JBT Health & Wellness Center website (www.ohsu.edu/jbt-health).

**The Major Medical/Dental rates represent 4 months of coverage. Coverage ends August 31, 2014. Fall term rates for new students admitted in Summer 2013 are Major Medical = \$885.27 and Dental = \$66.99. Summer 2014 rates for new students will be determined according to the 2014-2015 Academic Calendar.

Nurse Anesthesia
2013-2014 Tuition & Fee Charges By Term

Draft 6/27/2013

	Tuition		University	Student	Dental	Major Medical	Total Charges	
	Residents	Non-Residents	Fee	Council Fee	Insurance*	Insurance*	Residents	Non-Residents
9 credit hours	6,336.00	6,336.00	542.50	14.00	66.99	885.27	7,844.76	7,844.76
Per Credit								
1 credit hour	704.00	704.00	275.50	0.00	66.99	885.27	1,931.76	1,931.76
2 credit hours	1,408.00	1,408.00	275.50	0.00	66.99	885.27	2,635.76	2,635.76
3 credit hours	2,112.00	2,112.00	275.50	0.00	66.99	885.27	3,339.76	3,339.76
4 credit hours	2,816.00	2,816.00	275.50	0.00	66.99	885.27	4,043.76	4,043.76
5 credit hours	3,520.00	3,520.00	275.50	0.00	66.99	885.27	4,747.76	4,747.76
6 credit hours	4,224.00	4,224.00	275.50	0.00	66.99	885.27	5,451.76	5,451.76
7 credit hours	4,928.00	4,928.00	275.50	0.00	66.99	885.27	6,155.76	6,155.76
8 credit hours	5,632.00	5,632.00	275.50	0.00	66.99	885.27	6,859.76	6,859.76
Over-Time								
Each Additional Hour	704.00	704.00						

NOTES:

*OHSU requires students to carry major group health/dental insurance. For students with other major group health coverage, an insurance waiver application is available. For waiver application information and deadlines, refer to the JBT Health & Wellness Center website (www.ohsu.edu/jbt-health).

*The Major Medical/Dental rates represent 3 months of coverage and coverage ends June 30, 2014. The Fall term rates for new students are Major Medical = \$1,180.36 and Dental = \$89.32. Summer 2014 rates will be determined according to the 2014-2015 Academic Calendar.

School of Nursing Master or Certificate in Public Health, All Nursing Education Programs, Advanced Practice Gerontological Nursing Post Masters Certificate, Health Systems and Organizational Leadership, and PhD in Anchorage, Alaska and Tacoma, Washington
2013-2014 Tuition & Fee Charges By Term

Draft 6/27/2013

	Tuition*		Total Charges	
	Residents	Non-Residents	Residents	Non-Residents
9 credit hours	4,905.00	6,336.00	4,905.00	6,336.00
Per Credit				
1 credit hour	545.00	704.00	545.00	704.00
2 credit hours	1,090.00	1,408.00	1,090.00	1,408.00
3 credit hours	1,635.00	2,112.00	1,635.00	2,112.00
4 credit hours	2,180.00	2,816.00	2,180.00	2,816.00
5 credit hours	2,725.00	3,520.00	2,725.00	3,520.00
6 credit hours	3,270.00	4,224.00	3,270.00	4,224.00
7 credit hours	3,815.00	4,928.00	3,815.00	4,928.00
8 credit hours	4,360.00	5,632.00	4,360.00	5,632.00
Over-Time				
Each Additional Hour	545.00	704.00		

NOTES:

*Nonresident students who are residents of counties adjacent to the Oregon border in California, Idaho, Nevada or Washington pay Resident Tuition. Eligible students must notify the Registrar's Office by the first day of the academic term. Tuition for terms prior to the date the student notifies the Registrar's Office will continue to be charged at the nonresident rate.

*The non-resident portion of tuition is waived for PhD students from states participating in the Western Regional Graduate Program of the Western Interstate Commission for Higher Education. Those states include Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, North Dakota, South Dakota, Utah, Washington and Wyoming. Eligible students must notify the Registrar's Office by the first day of the academic term. Tuition for terms prior to the date the student notifies the Registrar's Office will continue to be charged at the non-resident rate.

Pharm.D.
2013-2014 Tuition & Fee Charges By Term

Draft 6/27/2013

	University Fee	Student Council Fee	Dental Insurance*	Major Medical Insurance*	Total Charges
1st Year	0.00	0.00	89.32	1,180.36	1,269.68
2nd Year	0.00	0.00	89.32	1,180.36	1,269.68
3rd Year	524.00	14.00	89.32	1,180.36	1,807.68
4th Year	257.00	0.00	89.32	1,180.36	1,526.68

NOTES:

*OHSU requires students to carry major group health/dental insurance. For students with other major group health coverage, an insurance waiver application is available. For waiver application information and deadlines, refer to the JBT Health & Wellness Center website (www.ohsu.edu/jbt-health).

*The Major Medical/Dental rates represent 4 months of coverage and coverage ends August 31, 2014. The Winter and Spring term rates for 4th year students are Major Medical = \$885.27, Dental = \$66.99, and coverage ends June 30, 2014.

OSU tuition and other applicable OSU student fees are paid directly to OSU.

Oregon Health & Science University

DRAFT

Academic Year Fee Book 2013-2014

Prepared by:

The Office of the Registrar,
June 27, 2013



Tuition & Fee Book

Academic Year 2013-2014

Oregon Health & Science University

DRAFT

The tuition and fee policies as outlined in this document apply to the Fall, Winter, Spring and Summer terms of the 2013-2014 academic year. All prior academic year *Fee Books* are repealed except as to rights or obligations previously acquired or incurred thereunder.

I. Definitions

A. Full-Time Student

A full time undergraduate student is one who is enrolled for at least 12 credits and not more than 18 credits per term. A full time graduate/professional student is one who is enrolled for at least 9 credits and not more than 16 credits per term. Students may be charged Mandatory Enrollment Fees for all credits enrolled for during a term.

B. Mandatory Enrollment Fees

Mandatory Enrollment Fees are those tuition and fees that a student is assessed for which the student has no discretion not to pay. Mandatory Enrollment Fees include, but are not limited to: Tuition, University Fee, Major Medical Insurance, Dental Insurance, Student Council Fee and others. There may be differentials for some tuition or fees based on residency, campus location or other criteria. Mandatory Enrollment Fees are set by the OHSU Board of Directors.

C. Non-Resident Student

A non-resident student is one who fails to meet the *Determination of Residence* requirements of the OHSU Residency Policy.

D. Over-Time Student

An over-time student is one who is enrolled in more than the maximum credits designated as full-time (more than 18 credits for undergraduate students; more than 16 credits for graduate students).

E. Part-Time Student

A part-time student is one who is enrolled in less than the minimum number of credits per term required of a full-time student (fewer than 12 credits for undergraduate students; fewer than 9 credits for graduate/professional students).

II. Tuition Policies

A. Tuition Differentials

Resident and non-resident tuition differentials may apply to students enrolled in certain academic programs.

B. Additional Tuition Charge

An additional per term tuition charge of \$300 will be assessed to Environmental and Biomolecular Systems Division masters students who work in the lab.

C. Advance Tuition Deposit

OHSU determines the student population for whom a tuition deposit will be required. The amount of the deposit varies and is set by the academic program.

D. Tuition Refund Schedule

Refunds of tuition and/or fees may be granted to students in accordance with the refund schedule on file with the university Registrar's Office. This schedule shall be prepared annually. There is no refund for Employee Tuition Benefits.

Notification of program Withdrawal or Leave of Absence is required and can be completed by submitting a "Withdrawal/Leave of Absence" form available from the university Registrar's Office. Students who believe that their circumstances warrant exceptions to the published refund schedule may submit a letter of appeal to the university Registrar.

The following uniform refund schedules are established for all schools:

<i>Starting from the Day on Which Classes Begin for the Term:</i>	<i>Percent Refund</i>
Complete or Partial Withdrawal Before the Close of the 11 th Calendar Day After Classes Begin for the Term	100%
Before the Close of the 25 th Calendar Day After Classes Begin for the Term	50%

The refund for course load reduction applies to all students reducing credit hours except for those credit hours within a tuition plateau. Any student with orders to report for active military duty may withdraw at any time during the term and receive a full refund. If sufficient course work has been accomplished and the instructor feels justified in granting credit for the course work completed, credit may be granted and withdrawal proceedings are unnecessary.

III. Fee Policies

A. Application Fee

An Application Fee will be assessed to all students seeking formal admission to an OHSU academic program. This includes those students advancing from an undergraduate program to a graduate program as well as all international students. An application will not be evaluated until the Application Fee has been received. The amount of the Application Fee varies and is set by the academic program. Application Fees are not refundable.

If a student applies to enroll for fall, winter, or spring term of an academic year but delays enrollment until a subsequent term, a second Application Fee will not be assessed if enrollment occurs within that academic year. If enrollment is delayed until the subsequent academic year, a second Application Fee will be assessed.

B. Dental Equipment Issue Fee

DMD students will be assessed a Dental Equipment Issue Fee according to the following schedule:

1st Year DMD Students:

\$4,747 per term in fall, winter and spring for a total yearly charge of \$14,241

2nd Year DMD Students:

\$2,283 per term in fall, winter and spring for a total yearly charge of \$6,849

3rd Year DMD Students:

\$861 per term in fall, winter and spring for a total yearly charge of \$2,583

4th Year DMD Students:

\$179 per term in fall, winter and spring for a total yearly charge of \$537

C. Other Fees, Fines, and Service Charges

- | | | |
|----|-----------------------|---------|
| 1. | Late Registration Fee | \$35.00 |
| 2. | Returned Check | \$40.00 |

A returned check charge will be assessed in the amount of \$40.00. Also, a late registration fee may be assessed if the returned check was used to pay tuition/fees.

3. Grade Transcript Fee

Official copy, ordered 48 hours in advance	\$15.00
Official copy, same day service	\$20.00
Faxed official copy	\$20.00

If priority delivery service is requested, there will be an additional \$20 charge.

4.	Certified Copies of Diplomas	\$10.00
5.	Duplicate Diploma	\$50.00
6.	Medical Student Dean's Letter	\$10.00
7.	Archived Records Retrieval Fee	\$20.00
8.	Copies of Education Records (except as exempted for release by <i>Family Educational Rights and Privacy Act (FERPA)</i> and university <i>Student Records Policy</i>)	
	1 st Page	\$ 5.00
	Each Additional Page:	\$ 1.00
9.	Examination for Credit	
	Institution-administered examination for credit, per course examination, regardless of credit hours involved.	Up to \$40.00
10.	Graduation Fee	\$50.00
11.	School of Nursing Transcript Evaluation Fee	\$25.00
	A fee will be assessed for a preliminary evaluation of transcripts, prior to submission of an application for admission, for the purpose of determining whether completed coursework would fulfill prerequisites required by the School of Nursing for admission to the baccalaureate nursing program. A preliminary transcript evaluation is not a requirement of the School of Nursing application process.	
	The final determination of whether an applicant's completed coursework meets the admission requirements may be made only by the Registrar's Office after an application for admission has been submitted.	
12.	International Student Fee, per term	\$50.00
	International students on F1 or J1 visas will be assessed a fee to support the tracking requirements associated with the international student SEVIS system.	
13.	Nursing Graduate Program Enhancement Fee, per term	\$1250.00
	A fee is assessed to graduate nursing students who have been determined, based on admissions criteria, to require specialized support services in areas of language competencies (reading, writing, listening, speaking) and orientation to graduate academic life. Students' needs for such services are evaluated during the admissions process.	

IV. Other Policies

A. Institutional Authority to Adjust Charges

OHSU institutional officials may make tuition refunds and waive fines or charges that result from circumstances beyond the student's control or are for the best interest of the institution. Institutional officials may also add and revise tuition or fee amounts established herein, for program changes or additions made after the adoption of this *Academic Year Fee Book* by the Board.

B. Charges for Services to Non-students

This *Academic Year Fee Book* does not identify charges for services that are continuously offered to persons other than students.

C. Courses Taken at Other Institutions

Students enrolled in coursework at an institution other than OHSU (regardless of whether the coursework is required by OHSU) are responsible for all costs (tuition and other fees) charged by that institution.

D. Auditors

Students enrolled in a combination of credit and audit courses or audit only will be assessed for the total credits under the tuition and fee schedule appropriate to their classification and residency.

E. Employee Tuition Benefit Program

An Employee Tuition Benefit program is available for some OHSU academic programs. A listing of Employee Tuition Benefit eligible programs, current policies and the online *Application for Employee Tuition Benefit* form are available on the Human Resources website at <http://ozone.ohsu.edu/hr/tuition>

V. Accounts Receivable Policy

A. Student Responsibilities

At the time a student formally registers for classes, either by signing and submitting the appropriate registration forms to the Registrar's Office, or by registering online, the student agrees to:

1. Assume financial responsibility for any tuition and fees as posted to his/her student account.
2. Abide by the official school policies regarding withdrawal from the University.

3. Assume the responsibility for understanding the University's official policy concerning schedule changes and satisfactory academic progress which may result in additional charges or the loss of eligibility for certain types of financial aid. It is considered the student's responsibility to understand how these changes can affect his/her financial situation with regard to financial aid eligibility.
4. Make sure OHSU student records are current and advise of any demographic changes such as name, address, telephone and email.

B. Payment Due Dates

Accounts Receivable approved financial arrangements must be in place one week after the start of classes for each program. Electronic Bills, or E-Bills, for tuition and fees are the official student billing method for OHSU. E-Bills are sent out on the second Tuesday of every month.

Students that do not receive an E-Bill can confirm account charges by accessing the online Institutional Student Information System (ISIS), <http://www.ohsu.edu/registrar/ISISOnline.htm> or by calling the Baird Hall Cashier's Office at (503) 494-8243. All students must pay on time even if an E-Bill is not received. Students should refer to the billing statement for the last day to pay tuition and fees in full before late charges are assessed.

C. Payment Options

Payment to student accounts can be made using cash, check, credit card (Visa/MasterCard) in person, by US mail or online through the Institutional Student Information System (ISIS) which is a secure payment option. However, student financial aid must be applied to student accounts before a credit card payment will be accepted. Any balance remaining after financial aid has been applied may be paid by credit card.

D. Refunds

A credit balance on a student account is created when financial aid, payments and other credits exceed total charges due. A refund of the credit balance will be processed and returned to the student using the following methods:

Direct Deposit – Direct deposit is the electronic transfer of funds into a checking or savings account. It is the quickest, safest and most convenient way to receive a refund. To elect to have refunds direct deposited, students must complete the OHSU Student Direct Deposit Authorization Form, attach a blank check and fax, mail or bring the form to the OHSU Baird Hall Cashier's Office.

Credit Card – If payment is made on a student account by credit card, then credit must be issued to the original credit card according to Visa/MasterCard regulations.

Check – Refunds in the form of a check can be picked up at the Baird Hall Cashier's Office, sent directly to the student's address on file or express mailed to another OHSU campus for pickup. Please be aware that there is a 24 hour hold on all checks before they

can be disbursed. The refund check will be delivered to the student upon presentation of a valid student ID. If a valid student ID is not available, students will be asked for two of the following: driver's license or other valid state or federal ID, student ID number, date of birth or social security number. The student will then be asked to verify the current address.

E. Payment Plans

The OHSU Student Accounts Office (Formerly the Bursar's Office) is responsible for billing and collection of tuition and fees. It is the goal of this office to work with students to resolve outstanding balances. It is understood that students and their families may experience financial difficulties and it is important for those types of issues to be communicated to the Student Accounts Office at an early stage. The Student Accounts Office offers payment plans to assist with the budgeting of the cost of education. However, those plans are only available to students prior to the due date of their bill. Students are urged to contact the Student Accounts Office prior to the due date of the bill to discuss any financial concerns that they may have. The earlier the issue is discussed the more tools are available to assist students in resolving the situation since **all** tuition/fees accrued in one term must be paid before registering for another term.

F. Educational Promissory Note

OHSU offers extended payment terms utilizing an Educational Promissory Note for unpaid tuition and fees. The Educational Promissory Note is a mandatory note and a new note is required every year.

G. Contractual Agreements

OHSU recognizes that employers or a third party may pay tuition and/or fees on behalf of students. These agreements are made between the student and the employer or third party. Students are responsible for meeting the requirements of the agreement such as grades and for any charges not paid by the employer or third party. Contractual agreements received from a government agency are between the US Government and OHSU. OHSU accepts only third party contracts that are on official company letterhead and include the following billing information: student's name, tuition quarter and amount paying.

H. Collection Actions

If the balance is not resolved by the due date, a financial hold will be placed on the account. Other collection actions on delinquent accounts include:

1. Prevention of students from registering for classes
2. Hold on registration, official transcripts, licensure certification, degree verifications, diplomas and grades
3. Debt referral to third party collection agency

4. Tax off-set of debt against State of Oregon Income Tax Refund (Oregon residents only)
5. Accounts with unresolved balances are subject to additional collection charges, legal and attorney fees.
6. Litigation against debtor.

I. Withdrawals

Should a student withdraw during the term, all refunds are to be applied to any outstanding balance, and any remaining balance will immediately be due and payable.

J. Delinquent Accounts

Students should refer to the billing statement for the last day to pay tuition and fees in full before late charges are assessed. If payment is not paid in full by the stated due date, then the following policies may apply.

1. Interest will be assessed at a rate of 1.5% per month of the outstanding balance.
2. All accounts over 121+ days delinquent and not making regular monthly payments will be sent to Oregon Department of Revenue or an outside collection agency.
3. Accounts referred to an outside collection agency will be subject to additional collection charges, legal and attorney fees. After an account has been turned over to a collection agency, OHSU can no longer accept payment on this account and students must remit payment directly to the agency.
4. OHSU reserves the right to recover all costs involved with the collection and/or litigation of delinquent accounts.
5. OHSU is a non-profit institution of higher learning. Student receivable accounts are considered to be educational loans offered for the sole purpose of financing an education and are not dischargeable in bankruptcy proceedings.
6. OSHU reserves the right to demand payment in the form of a certified check, money order, cash or credit card in the event that one or more checks have been returned unpaid for any reason.

The following website addresses most Accounts Receivable issues:

<http://www.ohsu.edu/xd/about/services/financial-services/managing/billing/students.cfm>



RESOLUTION 2013-06-01
OREGON HEALTH & SCIENCE UNIVERSITY
BOARD OF DIRECTORS
(Operating Budget and Capital Budget)

WHEREAS, Management has developed and has provided to the Board for its review the Operating Budget for Oregon Health & Science University for fiscal year 2013-14, including the tuition and fees for the academic year 2013-14 ("FY13-14 Operating Budget");

WHEREAS, Management has developed and has provided to the Board for its review the Capital Budget for Oregon Health & Science University for fiscal year 2013-14 ("FY 13-14 Capital Budget");

WHEREAS, the Board believes that the University's adoption of each of (i) the FY 13-14 Operating Budget, and (ii) the FY 13-14 Capital Budget is in the best interests of the University.

NOW, THEREFORE, BE IT RESOLVED, by the Board of Directors of Oregon Health & Science University as follows:

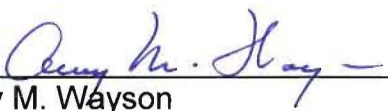
1. The Operating Budget for Oregon Health & Science University for fiscal year 2013-14 included in the June 27, 2013 Board docket accompanying this Resolution, including the tuition and fees for the academic Year 2013-14 as shown in the OHSU Academic Year Fee Book 2013-14, is hereby approved and adopted.
2. The Fiscal Year 2013-14 Capital Budget included in the June 27, 2013 Board docket accompanying this Resolution is hereby approved and adopted.

This Resolution is adopted this 27th day of June 2013.

Yeas 8

Nays 0

Signed by the Secretary of the Board on June 27, 2013.



Amy M. Wayson
Board Secretary



**RESOLUTION NO. 2013-06-02
OREGON HEALTH AND SCIENCE UNIVERSITY
BOARD OF DIRECTORS**

(Selection of Public Accounting Firm for Audit Services)

WHEREAS, pursuant to Resolution 2008-03-05, the Board of Directors of the University approved the selection of KPMG, LLP as the OHSU auditor for fiscal years 2008 through 2010 with a renewal option for two additional years.

WHEREAS, that engagement was extended for an additional two years so that KPMG, LLP served as the OHSU auditor for fiscal years 2011 and 2012.

WHEREAS, KPMG has delivered excellent service at a reasonable cost over the course of its engagement, and Management has determined that it is appropriate and in the best interests of the institution to extend the engagement of KPMG, LLP for an additional two years and thereafter submit the engagement of the OHSU auditor for competitive bids on a 7-year cycle.

WHEREAS, the Charter of the Finance and Audit Committee ("F&A Charter") requires that the members of that Committee recommend the selection of an independent audit firm, review the engagement letter of the audit firm, and oversee certain other matters intended to ensure the independence of the auditor and the integrity of the audit.

WHEREAS, the members of the Finance and Audit Committee have recommended that the engagement of KPMG, LLP as OHSU auditor be extended for the Extension Period, and they have reviewed the engagement letter associated with that extension.

NOW, THEREFORE, BE IT RESOLVED by the Board of Directors of Oregon Health & Science University as follows:

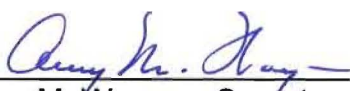
1. The Board of Directors approves the extension of the engagement of KPMG LLP as the OHSU auditor for the fiscal years 2013 and 2014, provided that the engagement letter associated with that extension ("KPMG Audit Engagement Extension") meets the requirements as set out in the F&A Charter.
2. The President of OHSU or his designee is authorized on behalf of OHSU to negotiate, execute and deliver the KPMG Audit Engagement Extension consistent with the terms of this Resolution.

This Resolution is adopted this 27th day of June 2013.

Yeas 8

Nays 0

Signed by the Secretary of the Board on June 27, 2013.



Amy M. Wayson, Secretary



**RESOLUTION NO. 2013-06-03
OREGON HEALTH AND SCIENCE UNIVERSITY
BOARD OF DIRECTORS**

(Achievement Compact with Oregon Education Investment Board)

WHEREAS, Oregon Health and Science University ("OHSU") works to continuously improve its education programs in order to provide the highest quality healthcare, science and engineering workforce for the State of Oregon.

WHEREAS, as a part of this effort and as required by Oregon law, OHSU has developed an Achievement Compact ("Achievement Compact") with the Oregon Education Investment Board for Fiscal Year 2014 in the form as attached hereto as Exhibit A.

WHEREAS, the Achievement Compact sets out outcomes that OHSU will strive to achieve during the course of the Fiscal Year, in furtherance of OHSU's education mission.

WHEREAS, the Board believes that entry into the Achievement Compact substantially in the form as attached hereto is in the best interests of the University.

NOW, THEREFORE, BE IT RESOLVED by the Board of Directors of Oregon Health & Science University as follows:

1. The Board of Directors approves the entry into the Achievement Compact substantially in the form as attached hereto, with the Oregon Education Investment Board.
2. The President of OHSU or his designee is authorized on behalf of OHSU to take such steps as are appropriate and consistent with the terms of this Resolution.

This Resolution is adopted this 27th day of June 2013.

Yeas 8

Nays 0

Signed by the Secretary of the Board on June 27, 2013.



Amy M. Wayson, Secretary

Achievement Compact between Oregon Education Investment Board and Oregon Health and Science University

Assumptions and Outcomes: OHSU shares in the responsibility of 40-40-20 as the major educator of health care professionals and biomedical scientists and engineers in the state. It strives to continuously improve its programs in order to provide the highest level of healthcare, science and engineering workforce for the State of Oregon. As a partner with undergraduate institutions throughout the state, it will continue to advance pipeline programs for OHSU's graduate programs in allied health, dentistry, medicine, nursing, science and engineering. As our compact with the state, we will strive for the following outcomes.

Outcome Measures	2011-12 Actual	2012-13 Projected	2013-14 Target
Completion			
<u>School of Medicine:</u> Number and percentage of students admitted to the M.D. program who are Oregonians	98 (76%)	87 (63%)	97 (70%)
<u>School of Dentistry:</u> Number and percentage of students admitted to the D.M.D program who are Oregonians	42 (56%)	38 (51%)	38 (51%)
<u>School of Nursing:</u> Number and percentage of graduates from the Bachelors of Nursing programs who are Oregonians	263 (89%)	346 (89%)	348 (89%)
<u>School of Nursing:</u> Total number of graduate degrees and certificates awarded	89	97	95
Total number of healthcare professional degrees and certificates awarded*	637	752	756

Note: Graduation rates in the M.D. and D.M.D. programs are almost equivalent to admission rates (>95%) and not reflective of yearly decisions resulting from changes in State appropriations. Admission rates more accurately reflect the impact of State funding on these programs. * Only includes degrees from programs for which the State provides a portion of the funding: DMD, MD, B.S. Nursing, Nursing Graduate Certificate in Public Health, Nursing Post Master Certificate programs, Nursing MPH, MN, MS, DNP, BS Radiation Therapy, Graduate Certificate in Dietetic Internship, Master of Physician Assistant Studies, and Master of Clinical Dietetics

Investment:

	FY 2012	FY 2013	FY 2014
State Funding for Education Programs*	\$28,039,213	\$23,885,256	\$27,218,200

*This figure does not include funding for the Area Health Education Centers or the Office of Rural Health

Conditions: This is a public agreement and can be amended by mutual consent:

Achievement Compact between Oregon Education Investment Board and Oregon Health and Science University

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Addressing Student Debt

Jenny Mladenovic, MD, MBA, MACP

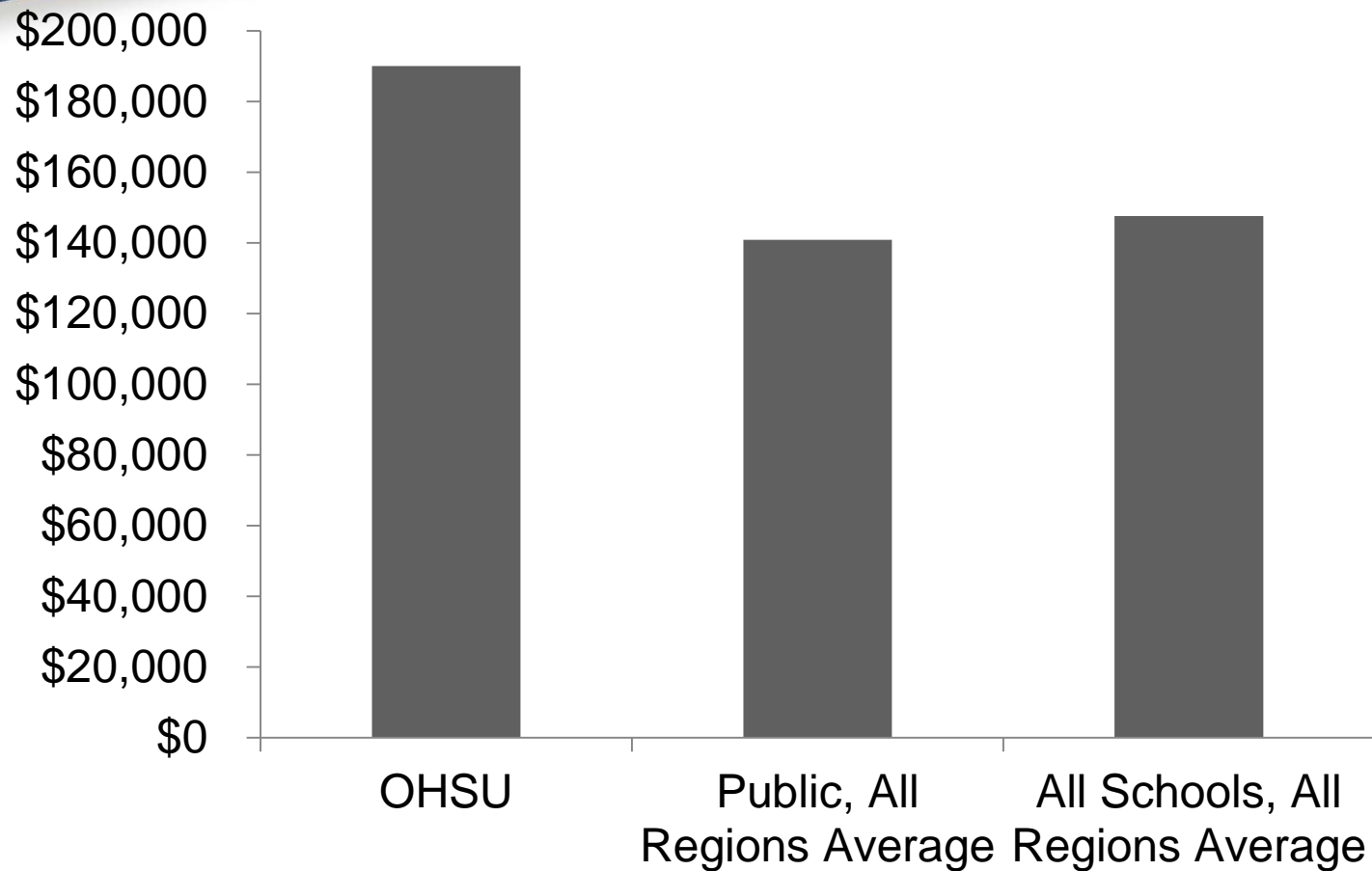
Addressing Student Debt

- Current Status: high tuition and debt
- Addressing Cost of an OHSU Education
- Managing the Debt for Students
- Tackling the Tuition Cost to Students

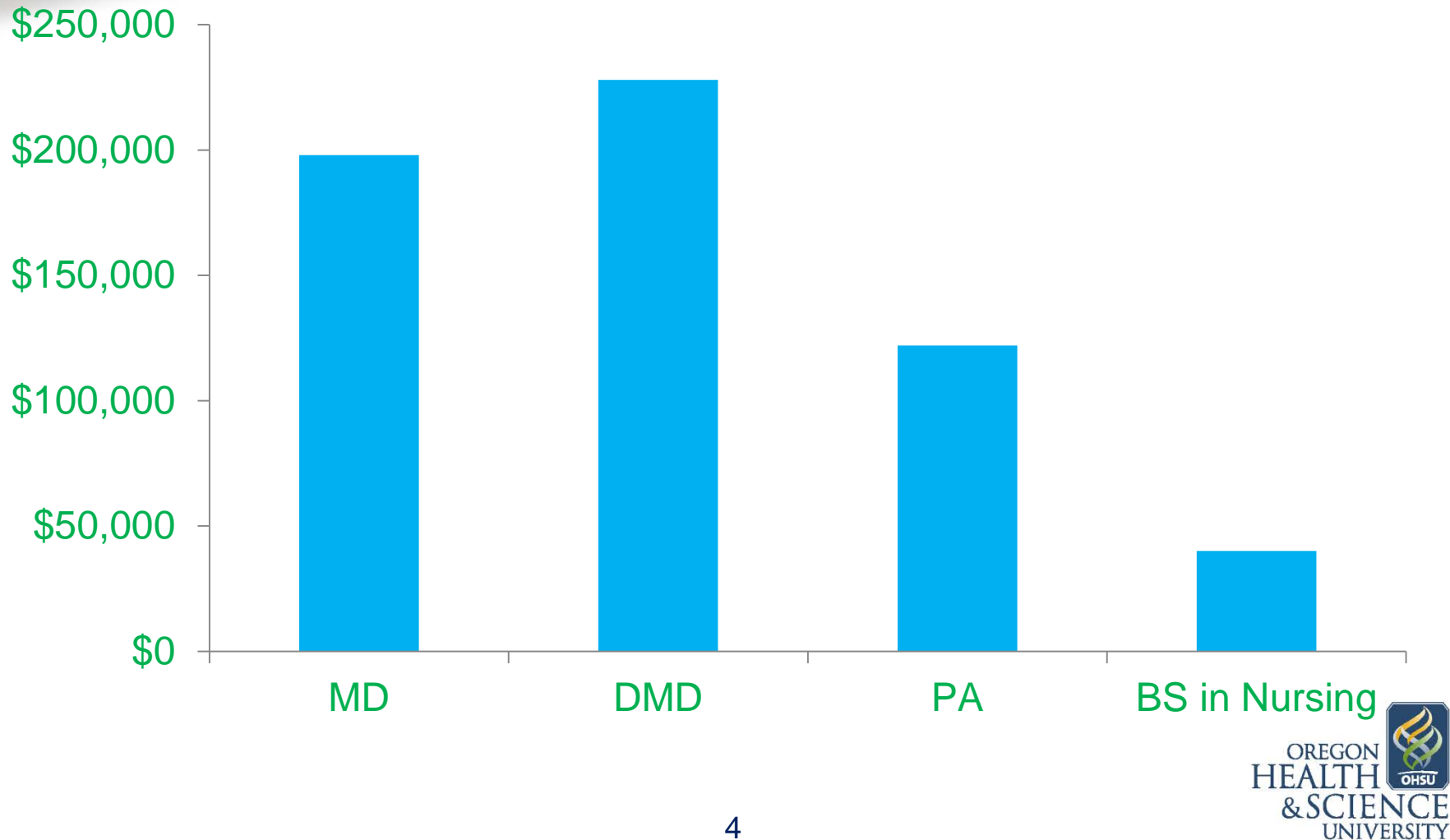
Tuition at OHSU

- Among public U.S. medical schools, OHSU's tuition and fees for in-state residents is now ranked third highest (\$44,682/year)
- Among public U.S. dental schools, OHSU's tuition and fees for in-state residents was ranked fourth highest (\$45,993/year)
- BS Nursing tuition and fees is lower than the private institutions, but higher than Washington (\$16,600/year)

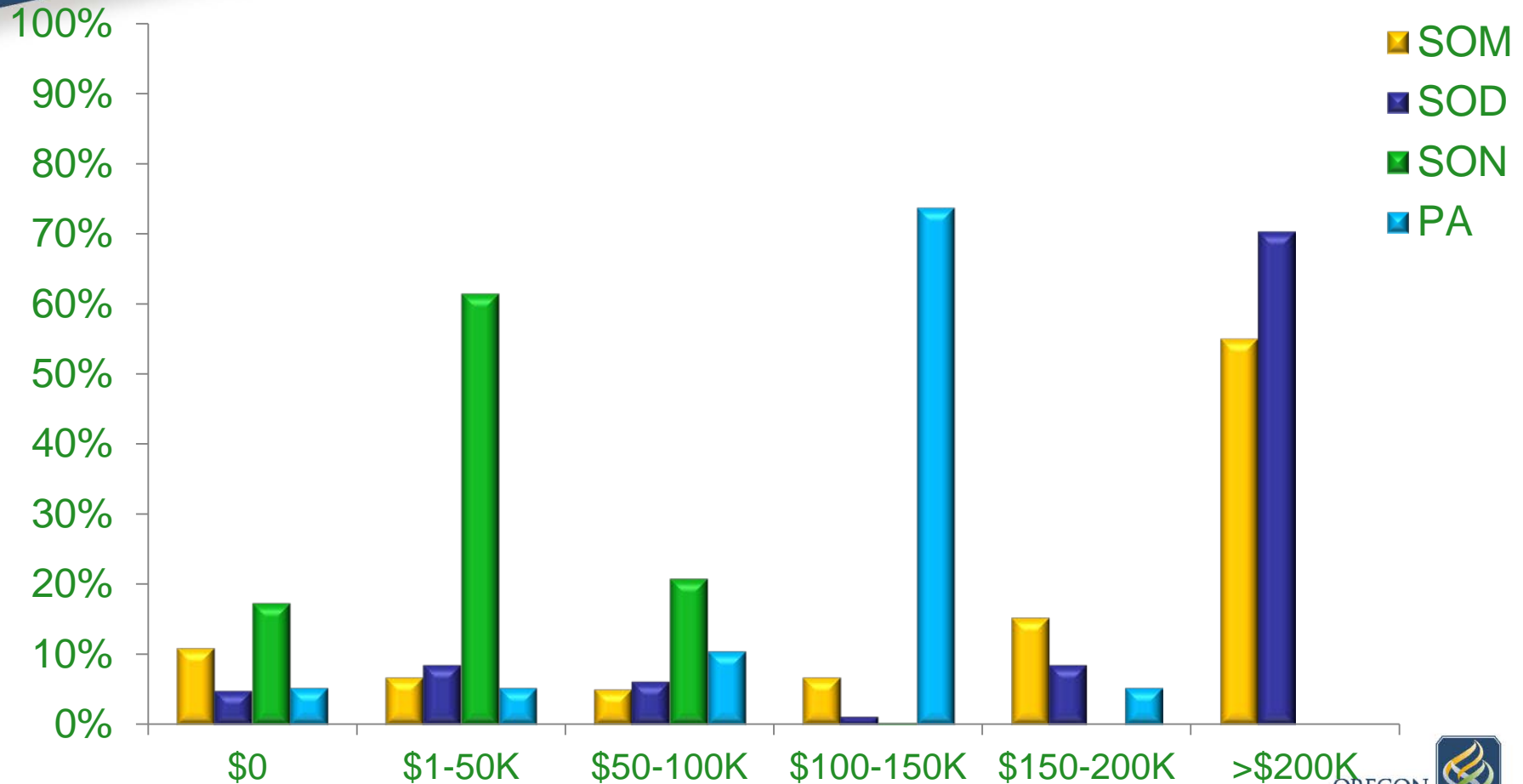
Average 2012 Medical School Debt of Indebted Graduates



2012-2013 Average Debt for OHSU



Students With Debt in OHSU Programs



Addressing the Cost of Education

- University fees (including student medical and dental insurance) remained flat or are being reduced
- Tuition increase 2.5% for AY 13, lower than usual of 4% in SOM; lower than anticipated in SOD.
- Streamlining operations in central student support services (uniform calendar, shared administrative services for students, shared educational services)

New Debt Counseling & Financial Management Program

- Program began in October 2012 with hiring of financial counselor
 - Required education and counseling for each student*
 - Frequent group engagements, web-site resource*
- 200 Individual counseling sessions with students
- High satisfaction in student survey.
- Student loan exit counseling requirements were transferred from CFS for more complete and better service to graduating students
- OHSU is leading the way in providing debt counseling services to students. (AAMC, January of 2014)

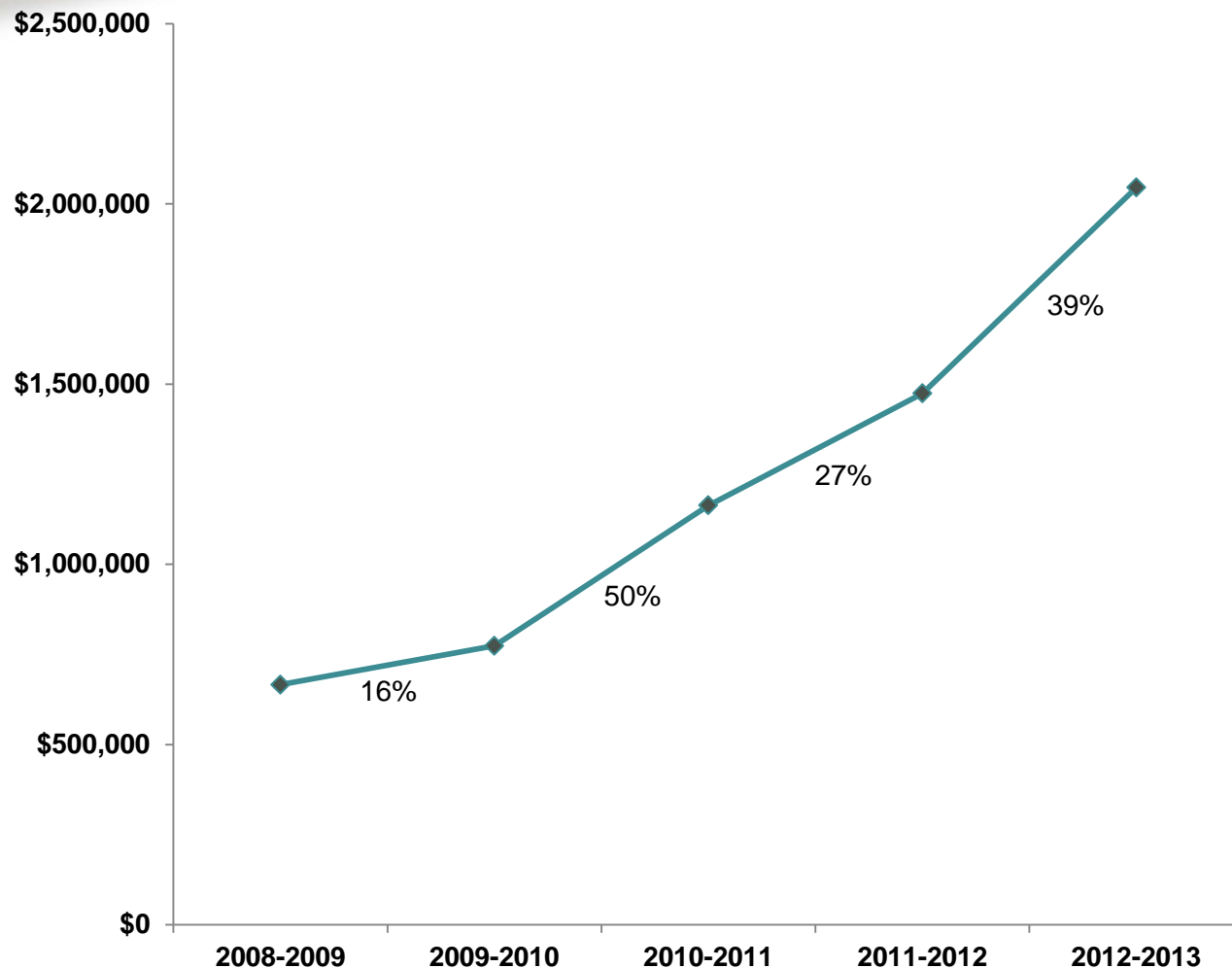
2012 SoM MD Grant-In-Aid Funding

- Changed the process for “grants-in-aid” for students

*No individual application needed, centralized
Grant-in-aid occurs earlier in the year, longer*

- SoM awarded MD students an additional \$571,000, with more funding directed at 4th years students to decrease total debt
- SOM dollars for grants-in-aid have tripled over the last four years

Increases in SoM MD Grant-In-Aid Funding



Year	Amount
2008-2009	\$0.6 Million
2009-2010	\$0.7 Million
2010-2011	\$1.1 Million
2011-2012	\$1.4 Million
2012-2013	\$2.2 Million

>\$2 Million to SOM to Address Debt

- First year students: 18%
- Second year students: 22%
- Third year students: 28%
- Fourth year students: 32%

Increased dollars to students closer to graduation for a greater impact on their debt burden.

2012 Diversity Grant-In-Aid Funding

- MD Students

Five four- year full tuition and fee awards for a 4-year grand total of approximately \$893,270

- DMD Students

One four year \$35,000 award and *two* four-year \$3,758 awards for a 4-year grand total of \$170,063

- Physician Assistant Students

Two 2+ \$13,000 awards and *two* 2+ \$7,744 awards for a 2+ year grand total of \$93,347

- Nursing Bachelor of Science Students

Three awards for a grand total of \$60,000

15 Students – 1.2 million dollars

2013 Recruitment: Oregon Healthy Scholars Senate Bill 2

- \$2.5 million to 21 Oregon students admitted to OHSU

Full tuition in exchange for return to Oregon communities of need

- DMD, MD, Grad Nursing, Physician assistants

Payback is program years + 1.

- Pipeline for students to access healthcare professions, without high debt

First generation, rural, under-represented, underserved

OHSU's Tuition Promise begins now, 2013

- **Promise:** all students in clinical programs will see no increase in tuition during the duration of their program (1-4 years)
- Affects 1730 students currently enrolled or planned to be enrolled in for AY 2013!
- Benefit: lower cost, lower debt, predictability for students and families

OHSU's Tuition Promise: Students

- Dentists
- Clinical dietetics and nutrition
- Nursing: 3-yr OCNE BS, Acc. BSN
- Nurse practitioners: nurse anesthetists, family nurse practitioner, nurse midwifery, psych mental health nurse practitioner
- Physicians
- Physician assistants

Addressing the Debt Burden: Oregon's Future Workforce

- New for 2013
 - 2013 Diversity Grants-in-aid (OHSU, \$2 million)*
 - Oregon Healthy Scholars (Senate Bill 2 – for 2014)*
 - OHSU's Tuition Promise*
- Continued commitment to control costs through novel and lean approaches
- Ongoing philanthropic growth in “scholarship dollars”
- Expansion of programs to address debt effect: financial counseling, wellness programs



The State of Diversity at OHSU: The Power of Difference

The Power of Difference Video



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OHSU Senior Vice President
Chief Administrative Officer
Chief Diversity Officer

OHSU Vision 2020

Embracing the Power of Difference

The Diversity Action Plan focuses on the opportunities to advance OHSU's missions in alignment with Vision 2020.

Vision 2020, Goal 1:

Be a great organization, diverse in people and ideas.

Strategy 1.2:

Transform OHSU from an organization that values diversity to one that lives it.

Diversity Definition

At OHSU, we embrace the full spectrum of diversity, including age, color, culture, disability, ethnicity, gender identity or expression, marital status, national origin, race, religion, sex, sexual orientation, and socioeconomic status. We respect and support diversity of thought, ideas and more.

OHSU Equal Opportunity Policy No. 03-05-030

Inclusion

To fully leverage the richness of our diversity at OHSU, we must create, maintain and promote a community of inclusion. Inclusion means we honor, respect, embrace and value the unique contributions and perspectives of all employees, patients, students, volunteers and our local and global communities. It also includes removing barriers to individual success.

OHSU Equal Opportunity Policy No. 03-05-030

The Business Case

Diversity and inclusion maximize our true business potential, creativity, innovation, quality patient care, educational excellence and outstanding service.

OHSU Equal Opportunity Policy No. 03-05-030

Creating a Community of Inclusion

To create a successful community of diversity and inclusion, the OHSU Executive **Leadership** Team must fully endorse and embrace the Diversity Action Plan.

Each leadership team member must ensure the plan is carried out by **each person** in their mission area and in **every business activity and strategy** within OHSU.

Integrating diversity and inclusion and achieving cultural transformation throughout the university requires **broad-based commitment**, sustainable and enduring support, and human and fiscal resources.

Guiding Principles for Success

- OHSU must continue to make a significant financial commitment and investment in individuals and programs.
- All OHSU community members must understand issues of diversity and inclusion are a shared responsibility.
- Diversity is a result of coordinated and sustained efforts by all members of the campus community. It requires innovative leaders.

Guiding Principles for Success Continued

- All OHSU members must value all people, ideas and thoughts, embracing the power of difference.
- OHSU must continue to develop methods to ensure leaders are accountable for implementing diversity initiative and programs.
- OHSU must implement effective, integrated and sustained continued communication and engagement strategies.
- Resources and tools are continuously available to make diversity and inclusion an integral part of all processes and initiatives in all mission and units.

Diversity Action Plan Vision

OHSU will successfully use the abilities of all OHSU community members to increase innovation, productivity, satisfaction, communication, inclusion and coordination in delivering effective organizational strategies for diversity and inclusion.

OHSU Diversity **Action** Plan 2013

OHSU Diversity Action Plan 2013: Creating a Community of Diversity and Inclusion



Reaffirms OHSU's institutional mission and commitment to supporting and sustaining a diverse and inclusive environment.

Goal 1: Increase Recruitment

Goal 2: Strengthen Retention

Goal 3: Improve the Climate of Inclusion

Goal 4: Build Community Partnerships

Goal 5: Benchmark for Excellence

Diversity Action Plan Structure

GOAL

- Strategy
 - Action
 - Metrics
 - Qualitative
 - Quantitative
 - Responsible Party

Diversity Action Plan Example

Goal 1: Increase Recruitment

Increase recruitment and representation of diverse students, residents, fellows, faculty and the workforce throughout OHSU.

STRATEGY 1: Increase diversity among OHSU students at Schools and affiliates.

Action	Metrics	Responsible
a. Analyze OHSU, local and national enrollment and graduation trends.	<ul style="list-style-type: none"> Implement unified student profile to annually report the demographics of applicants, interviewees, accepted applicants and matriculates across the academic units and measure against OHSU Fact Book and selected institutional peers. Track and report ratios of offers to prospective students to acceptance by those students, calculated for relevant demographic groups. Track and report the ratio and number of matriculated students, calculated for relevant demographic groups. 	Provost, Vice President for Research, Deans, Academic & Student Affairs Consultation from: Chief Diversity Officer, Director of Center for Diversity & Inclusion
b. Define priority population(s) and align with mission, vision and goals for diversity and inclusion.	<ul style="list-style-type: none"> Evaluate institutional alignment with recruitment and admissions priorities and processes. 	
c. Assess, develop and enhance admissions policies and processes to target diversity and inclusion.	<ul style="list-style-type: none"> Evaluate admissions policies, programs and processes to support and sustain diversity and inclusion. 	
d. Develop and implement enrollment management plan(s) focused to increase representation and inclusion of diverse and historically underrepresented minorities at the OHSU Schools of Medicine, Nursing and Dentistry, their programs and affiliates.	<ul style="list-style-type: none"> Implement enrollment management plan(s). Compare diversity and inclusion recruitment efforts and trends with institutional goals, state legislation, accreditation and academic medical centers and peers, including institutions recognized for excellence in diversity. 	
e. Develop and maintain formal and informal partnerships with academic and professional associations nationwide for the purpose of identifying and recruiting high-quality, diverse candidates.	<ul style="list-style-type: none"> Track and report partnerships and collaborations established and maintained by each school/program to support diverse student outreach and recruitment. Track and report presence at national and global diversity-focused recruitment events and activities. Track and report number of faculty and program directors actively engaged in partnerships with diversity-focused academic and professional associations. 	
f. Increase scholarship funding and other resources to support recruitment and retention of a diverse student body.	<ul style="list-style-type: none"> Track and report the number and dollar amounts of scholarships by demographic groups. Track and report the monetary contributions to the diversity fund through the OHSU Foundation. 	
g. Enhance collaboration for increased pipeline opportunities for prospective applicants.	<ul style="list-style-type: none"> Track and report school and community efforts and partnerships in K-20 pipeline initiatives for careers in health and sciences. Track and report number and demographics of student interns, volunteers and participants of programs at OHSU. Track and report the number of pipeline students that apply to and matriculate at OHSU. 	

Diversity Action Plan - Process

OHSU Diversity Action Plan

Goal 1: Increase Recruitment
Goal 2: Strengthen Retention
Goal 3: Improve the Climate of Inclusion
Goal 4: Build Community Partnerships
Goal 5: Benchmark for Excellence



Create Mission Diversity Action Plans

Academic
Affairs

Central
Services

Hospital
and Clinics

Research

School of
Dentistry

School of
Medicine

School of
Nursing



Submit Mission Plan for Review and Approval

Executive Leadership Team
Chief Diversity Officer
President



Publish Mission Plans

Website and Other
Communication Methods

Diversity Action Plan

GOAL 1

Increase recruitment and representation of diverse students, residents, fellows, and faculty and the workforce throughout OHSU.

- Strategy 1: Increase diversity among OHSU students at Schools and affiliates.
- Strategy 2: Increase diversity among residents and fellows.
- Strategy 3: Increase diversity in the faculty ranks within the OHSU Schools of Medicine, Nursing and Dentistry, their programs and affiliates.
- Strategy 4: Increase diversity in the workforce across OHSU missions.



Diversity Action Plan

GOAL 2

Strengthen retention of diverse students, residents, fellows, faculty and workforce.

- Strategy 1: Develop and implement a retention plan that drives and sustains diversity and inclusion.
- Strategy 2: Enhance career development, guidance, support and resources.
- Strategy 3: Establish and implement best practices for retention.



Diversity Action Plan



GOAL 3

Improve the climate of inclusion throughout OHSU to support and advance diversity.

- Strategy 1: Model and demonstrate inclusion.
- Strategy 2: Increase cultural awareness and understanding across OHSU.
- Strategy 3: Provide an inclusive and accessible environment.
- Strategy 4: Implement a university-wide diversity climate reassessment and improvement process, including periodic surveys, diverse focus groups and diversity program inventories.

GOAL 4

Build and enhance community, academic and business partnerships to engage diverse communities in the achievement of OHSU missions.

- Strategy 1: Develop an OHSU-wide diversity engagement plan and annual diversity community report.
- Strategy 2: Engage and partner with community-based organizations to end healthcare disparities.
- Strategy 3: Increase visibility and participation of clinical and research missions at local and national levels.
- Strategy 4: Increase OHSU's business relationships with minority, women-owned and emerging small businesses (MWESBs).
- Strategy 5: Strengthen relationships with the OHSU Foundation, schools, alumni and other entities to develop and increase diversity scholarships.



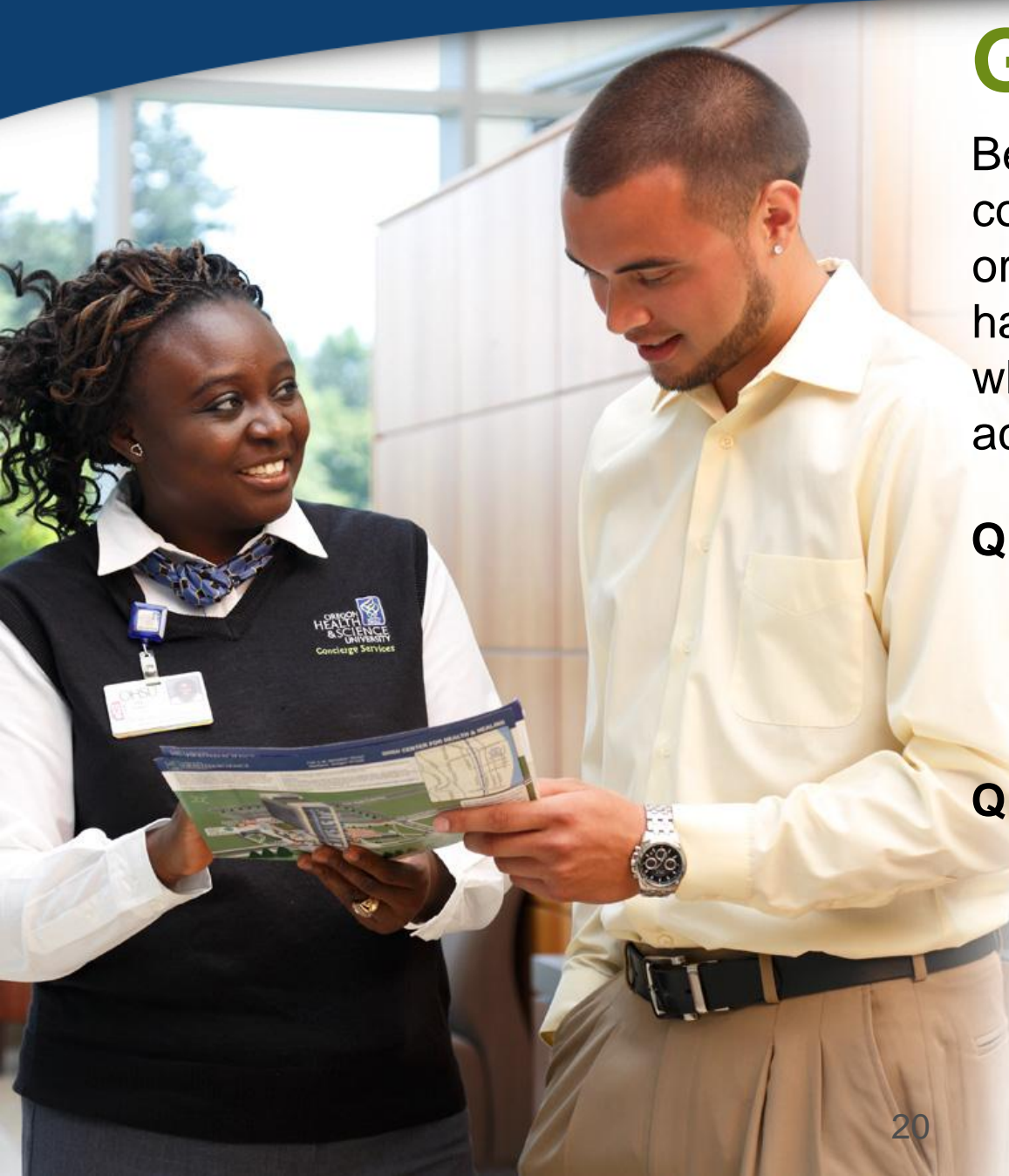
Diversity Action Plan

GOAL 5

Benchmarking is the process of comparing your organization to other organizations that are regarded as having successfully accomplished what your organization wants to achieve.

Qualitative metrics measure the presence of processes and actions that are intended to produce desired outcomes.

Quantitative metrics reflect actual outcomes and results; they serve as lagging indicators.

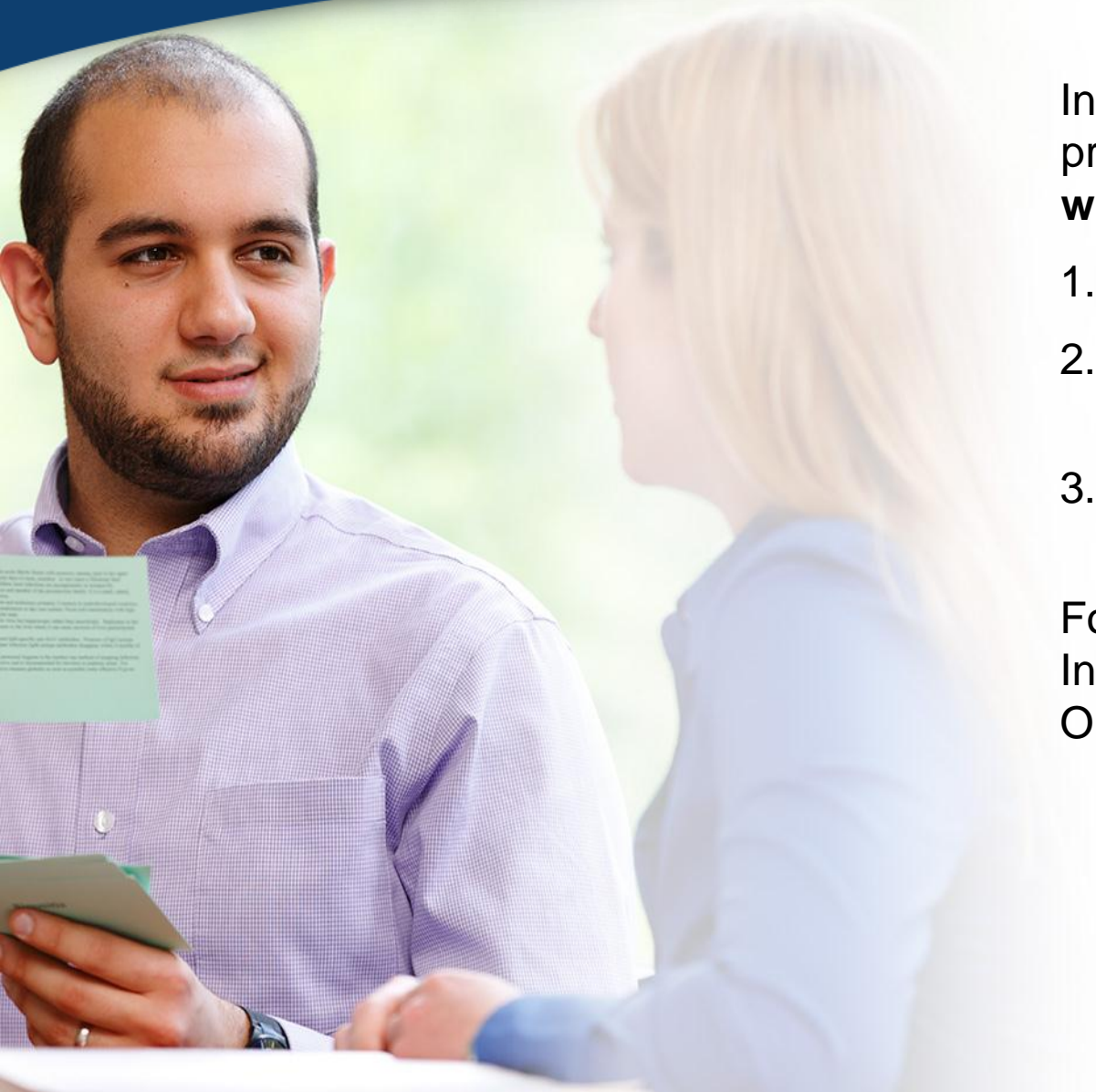


Benchmarking

Often dependent on leadership commitment to diversity, data collection is key to effective diversity measurement. Examples of meaningful data are:

- Level of participation in the firm's diversity vision formulation.
- Number of diverse employees in formal mentoring programs who get promoted.
- Percentage of diversity objectives aligned with key strategic business objectives that are tied to bonus and compensation systems.
- Representative mix on the board of directors.
- Overall organizational climate and culture ratings and their effects on all represented groups.

Benchmarking Continued



In order to appropriately assess OHSU's progress, **three types of benchmarking will be utilized:**

1. Benchmarking against ourselves
2. Benchmarking against peer and notable institutions
3. Benchmarking against accepted standards

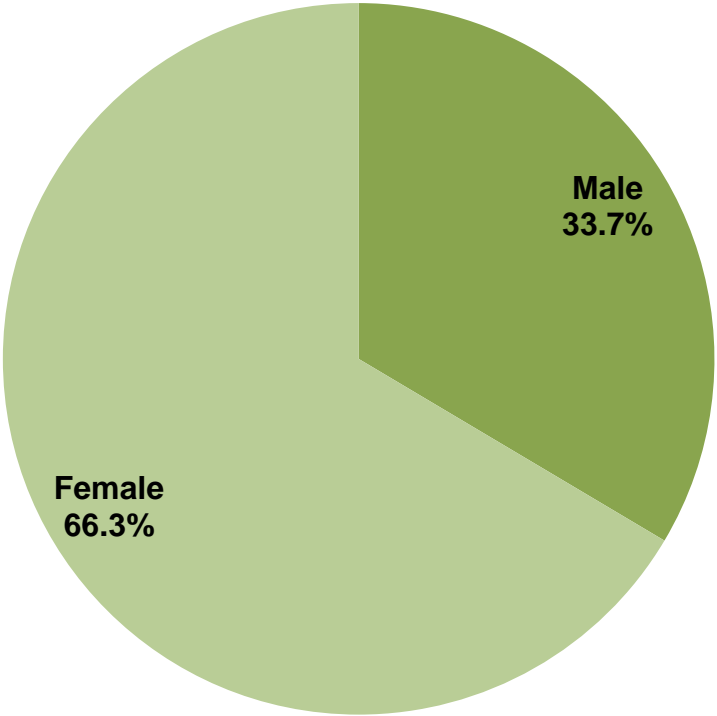
For example - Global Diversity and Inclusion Benchmarking Standards for Organizations Around the World

Reporting Structure

- Each mission/unit will submit a diversity action plan and annual progress report to the responsible executive leader and the chief diversity officer. Plans and reports will be posted on appropriate communicated throughout the university.
- In addition, annual Affirmative Action Plan templates will be submitted to the president, chief diversity officer and director of Affirmative Action & Equal Opportunity by January 31 each year.
- All plans will be posted on Affirmative Action & Equal Opportunity website, making them available to OHSU community.

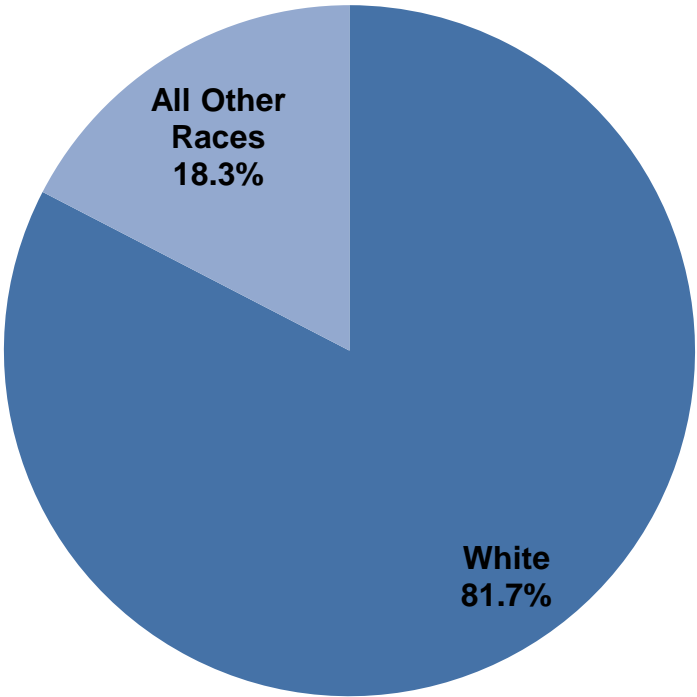
OHSU Total Employee Population Demographics

Gender



Male	Female
4,681	9,204

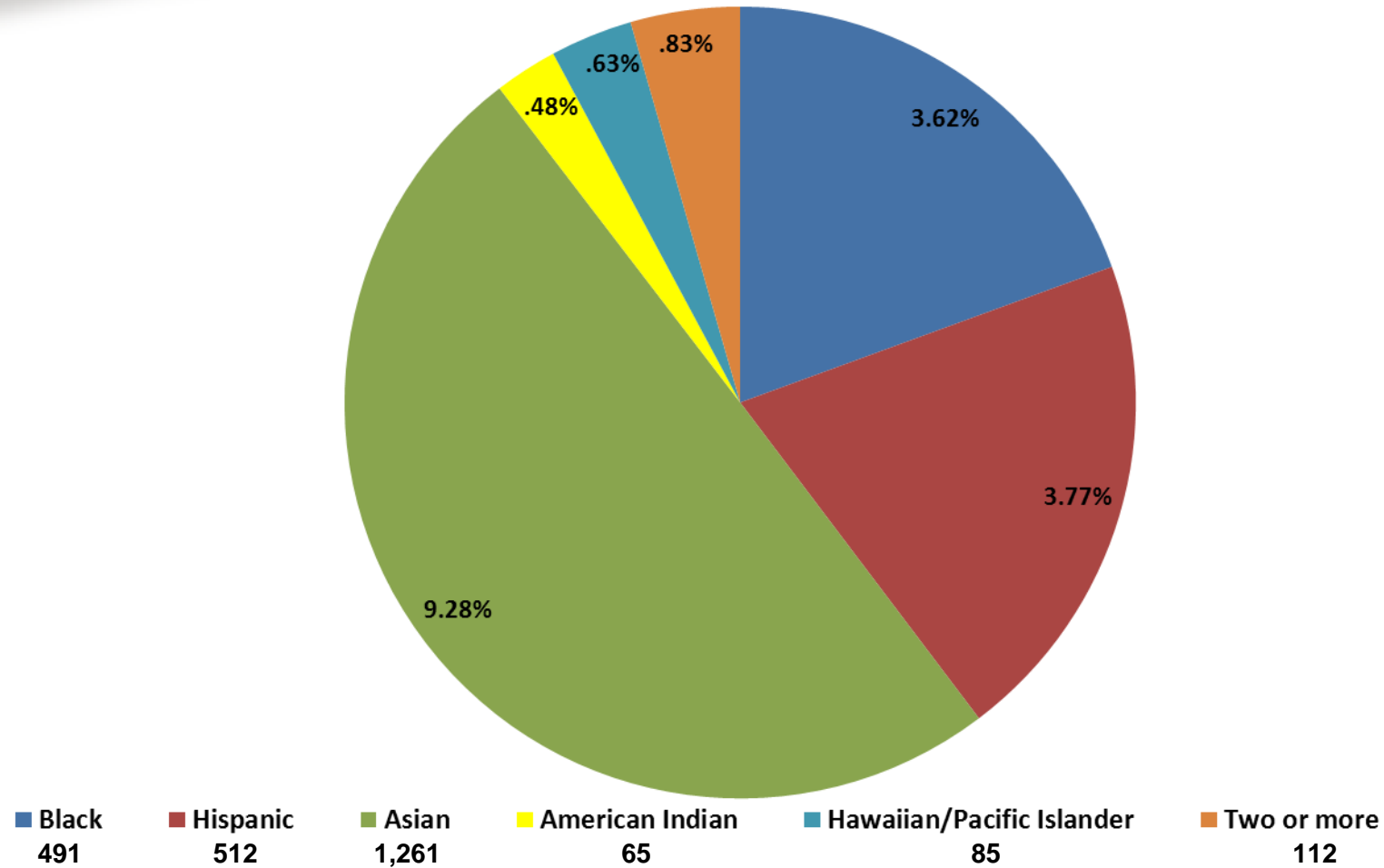
Race and Ethnicity



White	All Other Races
11,338	2,547

Minorities (Employees Only)

Race and Ethnicity



Federal Contractor “Minority” Definition (Employees only)

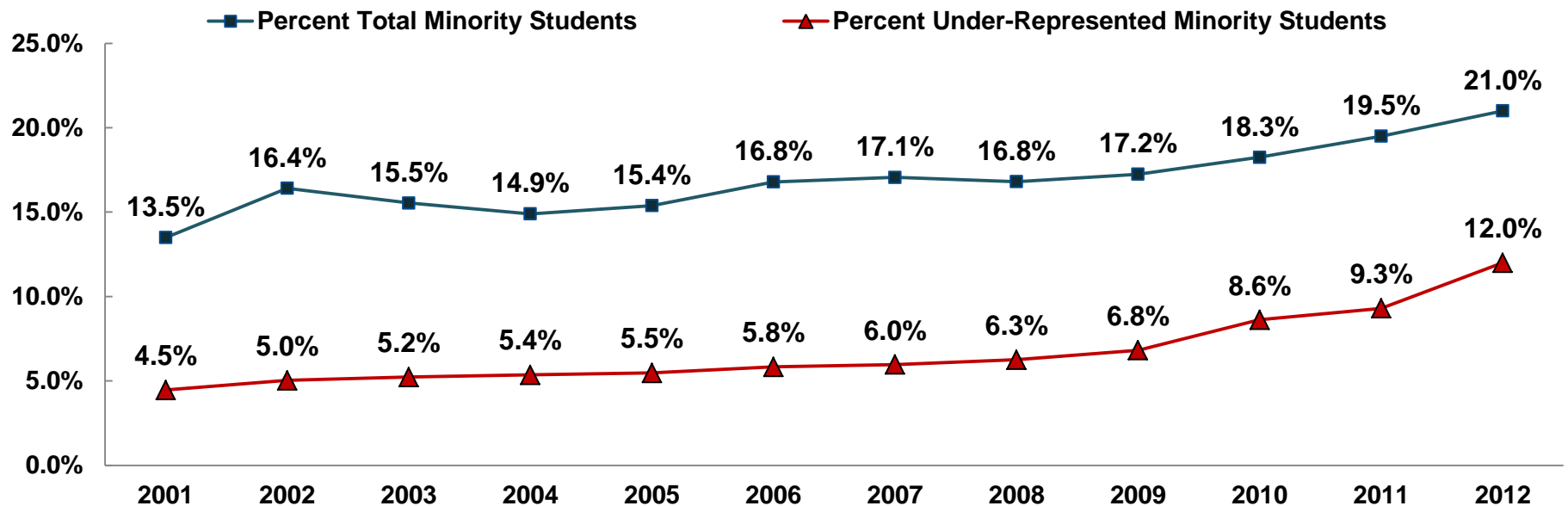
“Minorities”- employees may choose to self-identify

- **American Indian or Alaska Native**
- **Asian**
- **Black or African American**
- **Hispanic or Latino**
- **Native Hawaiian or Other Pacific Islander**
- **Two or more races**
- **White- Default category**

Student Diversity

Minority and Underrepresented Minority Enrollment as Percent of Total OHSU Enrollment

U.S. Citizen and Permanent Resident Only



Question & Answer