

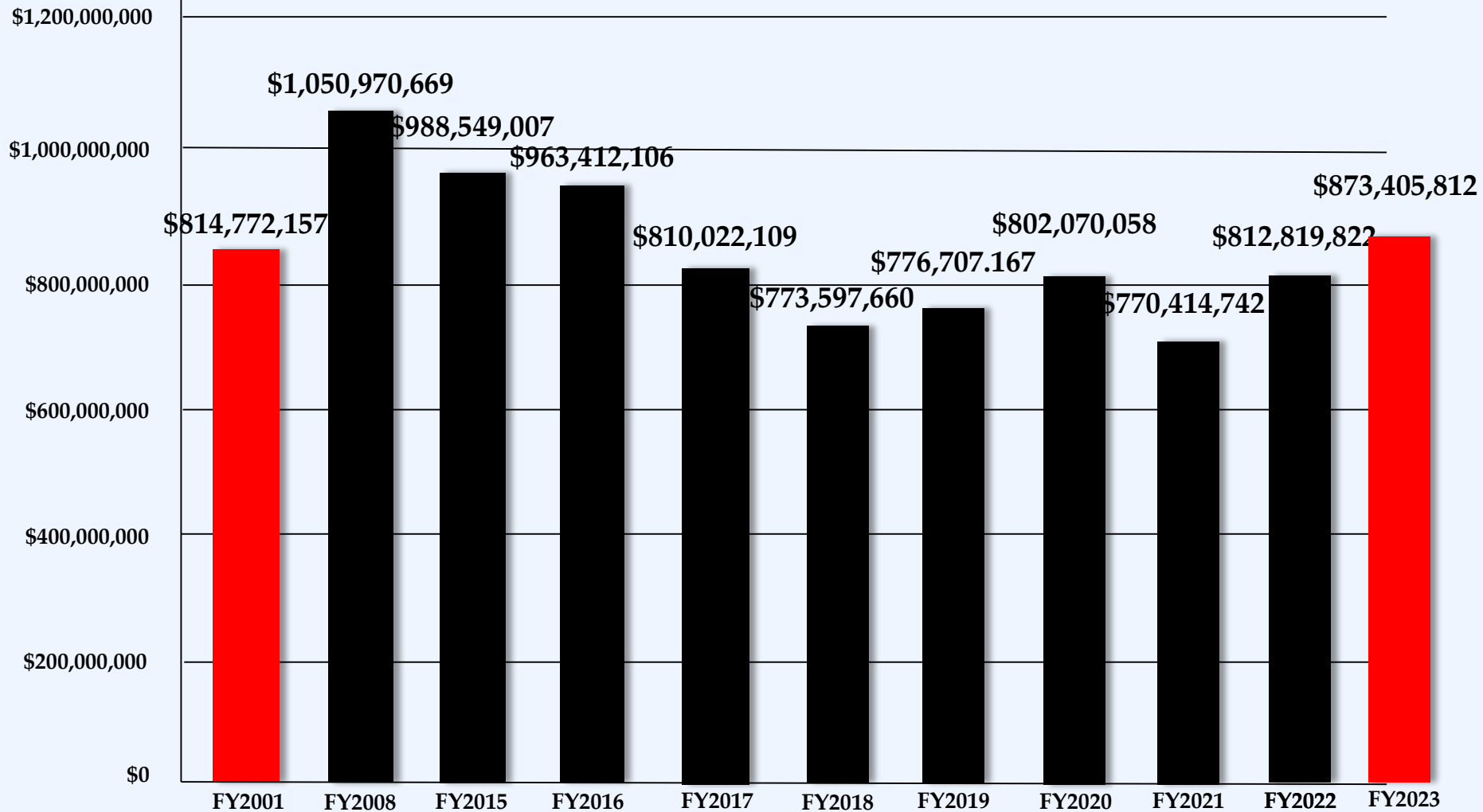


Tuition and Concurrent Enrollment Waiver Overview

Financial Aid Workshop Thursday, July 7, 2022

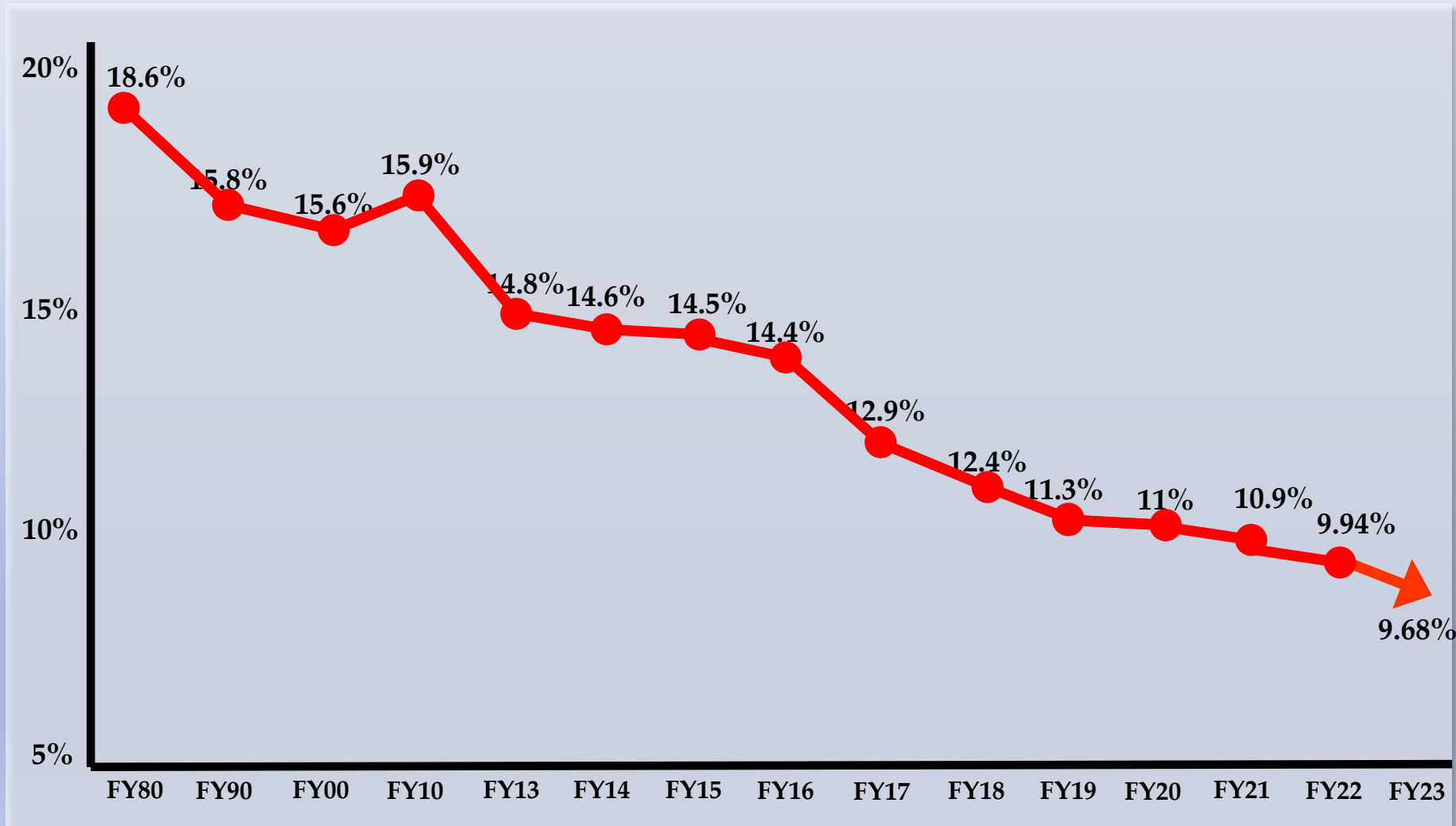


State Appropriations FY2001-FY2023





Higher Education's Percent of Oklahoma Total State Appropriations



FY2023 SOURCES AND USES OF FUNDS

E & G Part I

Universities, Colleges, and Constituent Agencies

			<i>(in millions)</i>	
	<u>FY2022</u>	<u>FY2023</u>	<u>\$ Change</u>	<u>% Change</u>
<u>INCREASED BUDGETED REVENUE:</u>				
State Appropriations - Operations	\$ 702.1	\$ 734.1	\$ 32.0	4.9%
Tuition and Fees	\$ 1,451.3	\$ 1,510.4	\$ 59.1	4.1%
Federal Stimulus CARES Funding	\$ 341.3	\$ 134.7	\$ (206.6)	-60.5%
Other	\$ 325.6	\$ 402.9	\$ 77.3	23.7%
Reserves	\$ 54.6	\$ 70.1	\$ 15.5	28.4%
TOTAL Increase	\$ 2,874.9	\$ 2,852.2	\$ (22.7)	-0.79%

INCREASED BUDGETED EXPENDITURES BY FUNCTION:

Instruction	\$ 1,156.2	\$ 1,172.8	\$ 16.6	1.4%
Research	\$ 112.9	\$ 120.1	\$ 7.2	6.4%
Public Service	\$ 115.6	\$ 90.9	\$ (24.7)	-21.4%
Academic Support	\$ 328.5	\$ 336.1	\$ 7.6	2.3%
Student Services	\$ 193.6	\$ 192.1	\$ (1.5)	-0.8%
Institutional Support	\$ 204.3	\$ 220.7	\$ 16.4	8.0%
Physical Plant	\$ 345.2	\$ 396.1	\$ 50.9	14.7%
Scholarships	\$ 418.6	\$ 323.4	\$ (95.2)	-22.7%
TOTAL Increase	\$ 2,874.9	\$ 2,852.2	\$ (22.7)	-0.79%

INCREASED BUDGETED EXPENDITURES BY OBJECT:

Salary & Wages	\$ 1,164.7	\$ 1,252.0	\$ 87.3	7.5%
Fringe Benefits	\$ 395.8	\$ 413.6	\$ 17.8	4.5%
Professional Services	\$ 39.7	\$ 42.4	\$ 2.7	6.8%
Scholarships/Waivers	\$ 418.9	\$ 322.7	\$ (96.2)	-23.0%
Utilities	\$ 90.9	\$ 97.2	\$ 6.3	6.9%
Supplies/Other Operations	\$ 518.1	\$ 486.6	\$ (31.5)	-6.1%
Library Books and Periodicals	\$ 30.2	\$ 30.9	\$ 0.7	2.3%
Equipment	\$ 119.9	\$ 154.4	\$ 34.5	28.8%
Transfers and Other Disbursements	\$ 96.4	\$ 52.4	\$ (44.0)	-45.6%
TOTAL Increase	\$ 2,874.9	\$ 2,852.2	\$ (22.7)	-0.79%

FY23 New Allocations to Financial Aid/Scholarships

- \$16.9 million to Future Teacher Scholarship and Employment Incentive
- \$4.0 million to Concurrent Enrollment Waivers
- \$2.013 million to OTAG
- \$1.15 million to Adult Degree Completion and Workforce Re-entry Scholarships
- \$1.5 million to the Tulsa Reconciliation and Education Scholarship (one-time increase)
- \$850,000 to Academic Scholars' Program
- \$300,855 to OTEG
- \$275,000 to Regional University Scholarships

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Resident and Nonresident Tuition Waivers

Total FY23 Budgeted Waivers



Resident Waivers Within 5.0% limitation:

- \$139.9 million authorized for waivers – Only 56.4% Budgeted
- \$79 million budgeted for waivers, a decrease of \$95,510 from FY2022 budgeted (-0.1%)



Resident Waivers Outside 5.0% limitation:

- \$25.8 million budgeted, increase of \$2.0 million (8.0%)



Nonresident Waivers:

- \$162.8 million budgeted for nonresident students
- An increase of \$15.2 million from FY2022 budgeted (6.8%)

Total Waivers:

- \$267.5 million in budgeted waivers
- An increase of \$16.9 million, or 6.8%.
- Represents 9.6% of total budgets

State Regents' Tuition Waiver

Key Policy Provisions

- Tuition and fees may neither be assessed nor waived unless authorized by general policy or specific authorization of the State Regents (4.18.4A, and 4.18.6)
- Intent of the resident waiver is to provide assistance to Oklahoma students with demonstrated need and to promote excellence of scholarship throughout all academic levels and professional fields of study. (4.18.5A)

Basis of Award – 5.0% Requirement

- Resident students only
- Increased from 3% in FY04 to comply with legislative intent to increase financial aid proportionate to tuition increases and pilot program approved in FY20 to 5% of Part 1 E&G Budget
- Four categories: Financial Need, Scholarship and Student Achievement, Benefits for Eligible Employees, and Concurrently Enrolled Students (first 18 credit hours for seniors excluded, all others subject this limitation)
- 50% of these scholarships must be awarded to students with financial need

Utilization of FY2023 Budgeted Award Amounts Authorized Within 5.0% Resident Cap

		Average	High	Low
Research		68.0%	70.0%	67.8%
Regionals		74.7%	97.6%	53.3%
Community Colleges		51.3%	69.8%	19.9%
Technicals		35.0%	37.8%	32.2%
Constituents		19.5%	43.5%	0.0%

Basis of Award – Other Waivers not Subject to 5.0% Requirement

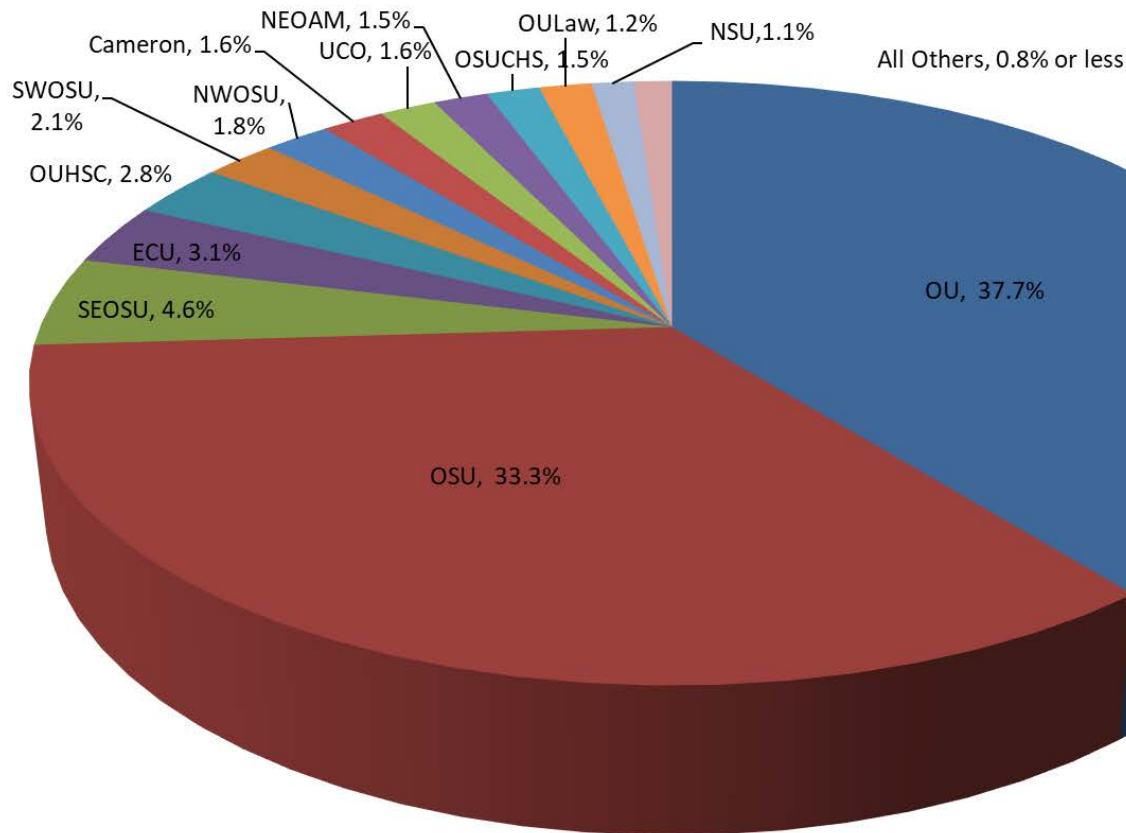
- Senior Citizens – Audit
- Prisoners of War/Missing in Action
- Dependents: OK Peace Officers/Firefighters/EMTs
- Graduate Teaching & Research Assistants
- Exchange Students on Reciprocal Basis
- Academic Scholars Program
- OK National Guard
- Regional University Baccalaureate
- Students Called to Active Duty and Families- (nonresident portion)
- Students in Custody of DHS
- Concurrently Enrolled High School Seniors/Juniors (first eighteen credit hours for Seniors and nine hours for Juniors)

Nonresident Waivers

- Policy Definition (4.18.5 B – 1.)
 - Any institution in The State System may award a scholarship that includes a waiver of a portion of the nonresident tuition as provided in 70 O.S. § 3226 which the amount shall not exceed the difference between nonresident tuition and the amount paid by resident students.

Nonresident Tuition Waiver Awards Budgeted for FY2023

\$162.8
Million Total



Full Nonresident Tuition Waivers

- By policy there are only three ways in which to grant a “full” 100% waiver of nonresident and resident tuition:
 - A. Pay the difference of the resident portion by some cash source – foundation, private scholarship funds, private sponsorship
 - B. Request and be granted an exception to policy by formal action of the State Regents. Three institutions to date have requested exceptions for fee waivers only.
 - C. Specifically authorized in resident waiver policies (i.e. Academic Scholars, Graduate Assistants, Prisoner of Wars, MIA and their dependents, Student on Reciprocal Exchange, Dependents of Peace Officers or Fire-Fighters¹⁴ KIA)

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CONCURRENT ENROLLMENT WAIVERS

Concurrent Enrollment Waiver Program

Senate Bill 1196

Amended 70 O.S. § 628.13

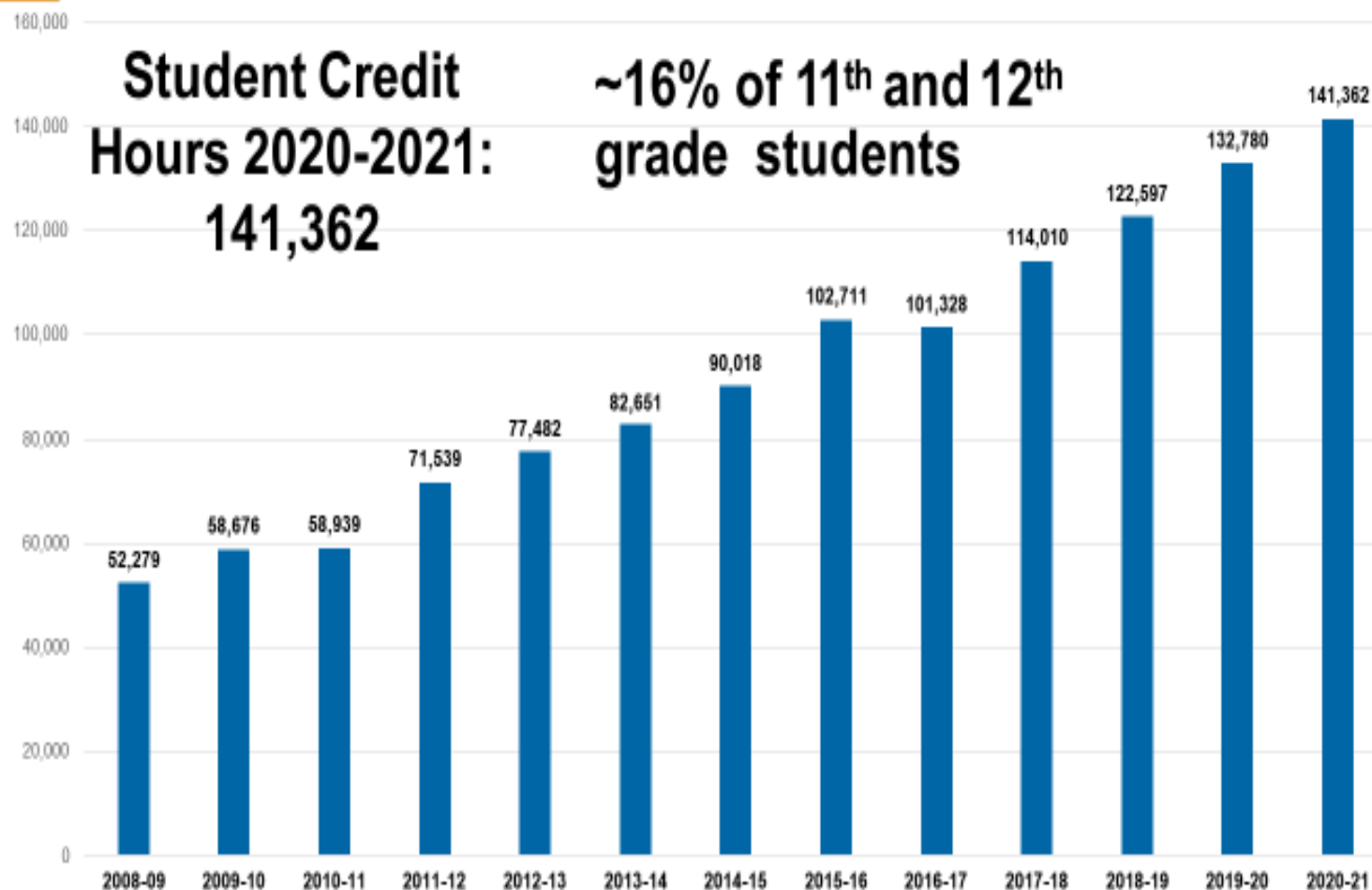
Effective date July 1, 2018 – Fall 2018 Semester

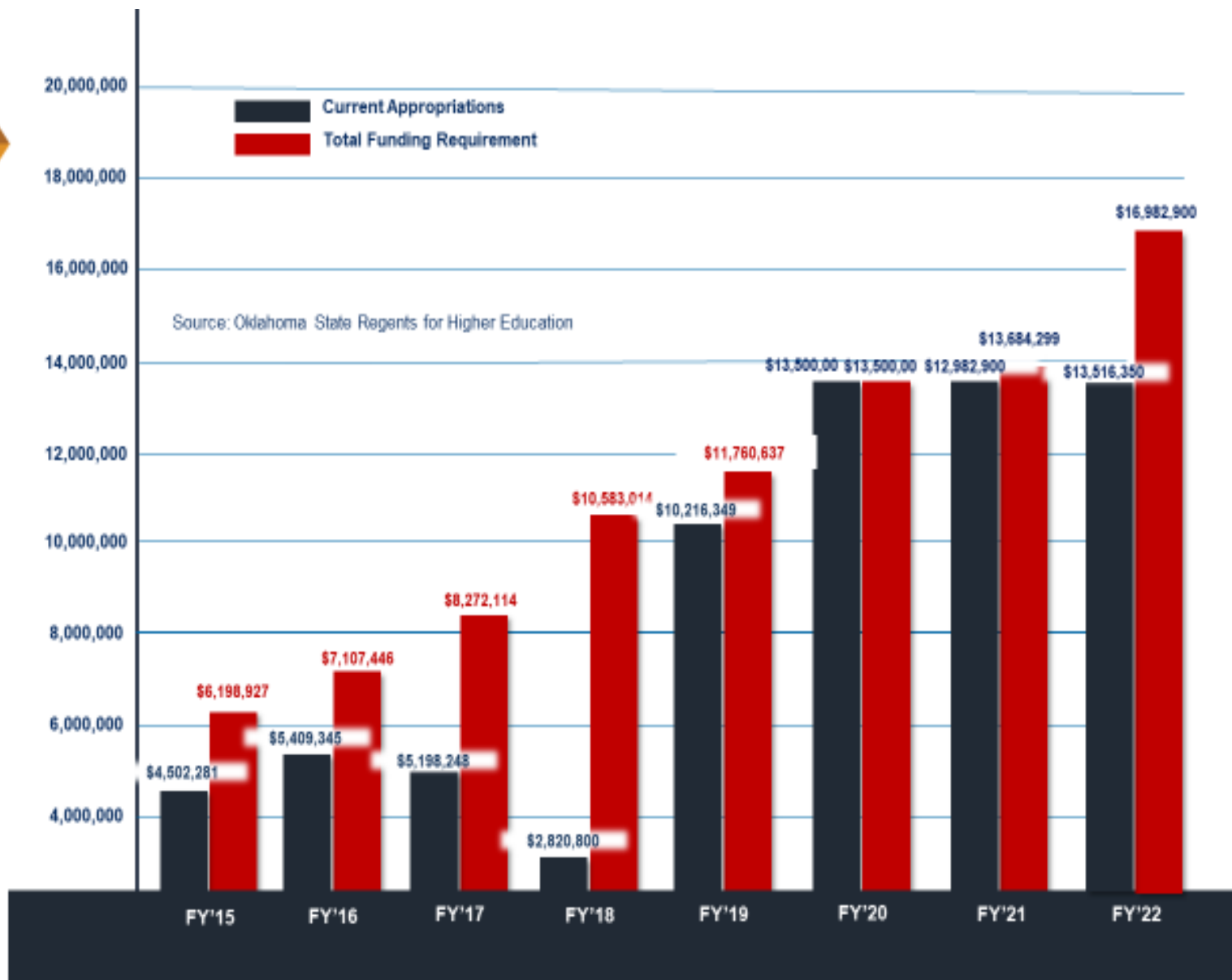
Concurrent Enrollment Program

- ✓ High School Seniors eligible for 18 hours of tuition waiver during their senior year – no longer limited to six hours per semester.
- ✓ Subject to the Senior Waiver Program being fully-funded, juniors may receive tuition waivers up to 9-credit hours, subject to availability of funds.
- ✓ Annual reporting requirements on OSRHE.
- ✓ In FY2023, we are funded at 100% of actual waivers for Senior and Junior High School participants.



GROWTH OF CONCURRENT ENROLLMENT IN OK





Contact Information:

Sheri Mauck

**Assoc. Vice Chancellor for Budget and
Finance**

405-225-9201

smauck@osrhe.edu