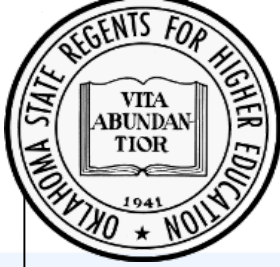


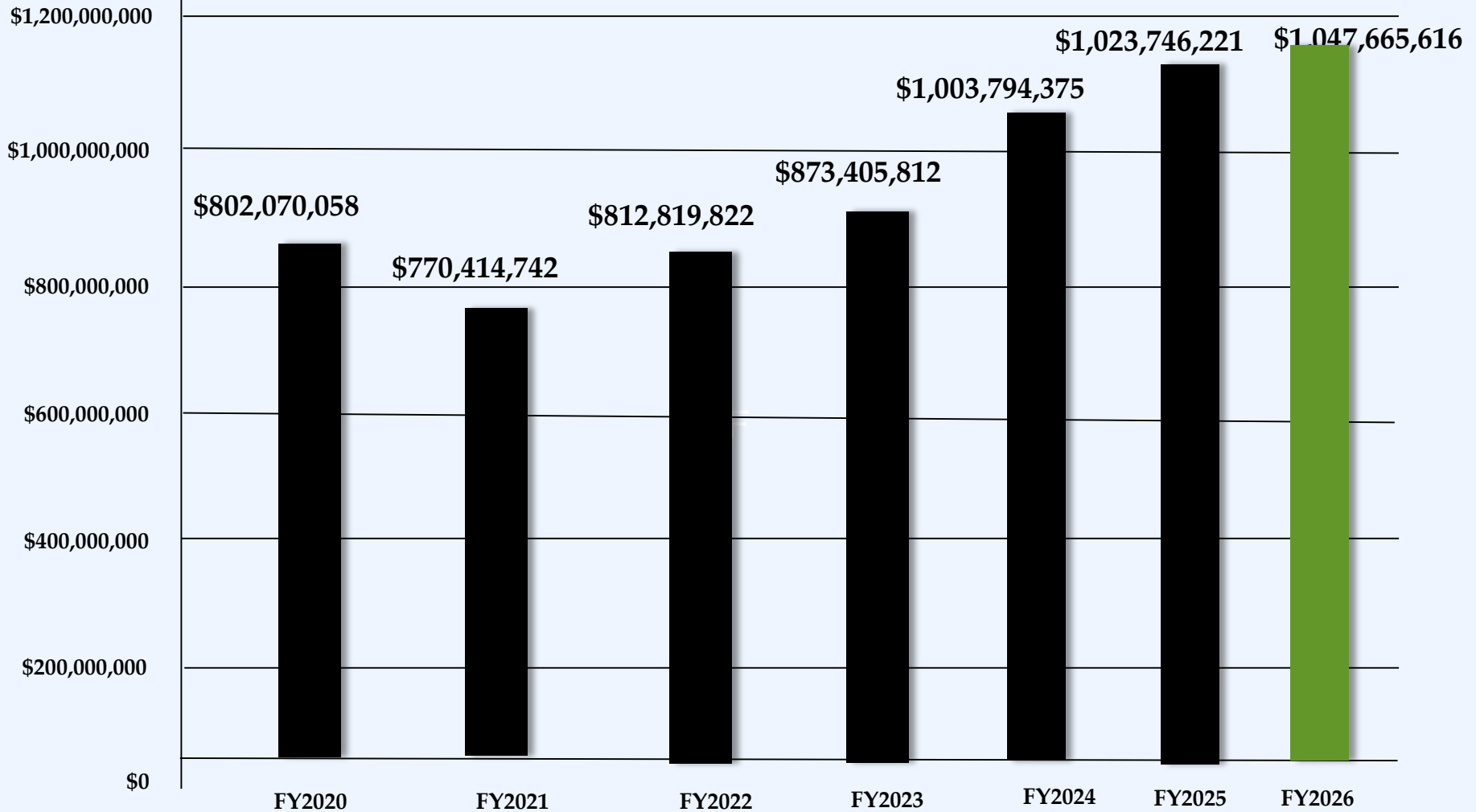
The background of the slide is a grayscale image of several stacks of US one hundred dollar bills, arranged in a slightly overlapping, diagonal pattern. The bills are tied with rubber bands. The text is overlaid on this background.

Tuition and Concurrent Enrollment Waiver Overview

**Financial Aid Workshop
Thursday, July 17, 2025**



State Appropriations for Operations FY2020-FY2026



FY-26 SOURCES AND USES OF FUNDS
E&G Part I
Universities, Colleges, and Constituent Agencies

(in millions)

	<u>FY-25</u>	<u>FY-26</u>	<u>\$ Change</u>	<u>% Change</u>
<u>INCREASED BUDGETED REVENUE:</u>				
State Appropriations - Operations	\$ 855.1	\$ 869.6	\$ 14.5	1.7%
Tuition and Fees	\$ 1,552.5	\$ 1,665.4	\$ 112.8	7.3%
Federal Stimulus Funding	\$ 78.9	\$ 86.8	\$ 7.9	10.1%
Other	\$ 489.6	\$ 472.6	\$ (17.0)	-3.5%
Reserves	\$ 47.5	\$ 35.5	\$ (12.0)	-25.3%
TOTAL Increase	\$ 3,023.6	\$ 3,129.8	\$ 106.2	3.5%

INCREASED BUDGETED EXPENDITURES BY FUNCTION:

Instruction	\$ 1,274.2	\$ 1,280.8	\$ 6.6	0.5%
Research	\$ 134.9	\$ 148.4	\$ 13.5	10.0%
Public Service	\$ 82.8	\$ 90.6	\$ 7.8	9.4%
Academic Support	\$ 349.3	\$ 356.6	\$ 7.3	2.1%
Student Services	\$ 186.7	\$ 190.1	\$ 3.4	1.8%
Institutional Support	\$ 248.1	\$ 257.0	\$ 8.9	3.6%
Physical Plant	\$ 412.5	\$ 453.5	\$ 41.0	9.9%
Scholarships	\$ 335.1	\$ 352.9	\$ 17.8	5.3%
TOTAL Increase	\$ 3,023.6	\$ 3,129.8	\$ 106.2	3.5%

INCREASED BUDGETED EXPENDITURES BY OBJECT:

Salary & Wages	\$ 1,350.0	\$ 1,389.6	\$ 39.6	2.9%
Benefits	\$ 437.5	\$ 457.3	\$ 19.8	4.5%
Professional Services	\$ 49.3	\$ 53.9	\$ 4.6	9.3%
Scholarships/Waivers	\$ 334.0	\$ 352.8	\$ 18.8	5.6%
Utilities	\$ 104.8	\$ 102.7	\$ (2.1)	-2.0%
Supplies/Other Operations	\$ 549.1	\$ 557.7	\$ 8.6	1.6%
Library Books and Periodicals	\$ 30.0	\$ 28.8	\$ (1.2)	-4.0%
Equipment	\$ 100.0	\$ 99.6	\$ (0.4)	-0.4%
Transfers and Other Disbursements	\$ 68.9	\$ 87.4	\$ 18.5	26.9%
TOTAL Increase	\$ 3,023.6	\$ 3,129.8	\$ 106.2	3.5%

FY26 New Allocations to Financial Aid/Scholarships

- \$2.0 million to Rising Scholars – Academic Scholars Program.

Initial funding for the expansion of the Academic Scholars Program.

The background of the slide is a piece of marbled paper with a complex, organic pattern of swirling, vein-like shapes in various shades of gray, from light to dark. The pattern resembles natural stone or biological tissue.

Resident and Nonresident Tuition Waivers

Total FY26 Budgeted Waivers



Resident Waivers Within 5.0% limitation:

- \$153.3 million authorized for waivers – Only 60.2% Budgeted
- \$92.2 million budgeted for waivers, an increase of \$8.2 million from FY2025 budgeted (9.7%)



Resident Waivers Outside 5.0% limitation:

- \$25.8 million budgeted, decrease of \$2.5 million (-8.8%)



Nonresident Waivers:

- \$185.6 million budgeted for nonresident students
- An increase of \$10.4 million from FY2025 budgeted (5.9%)

Total Waivers:

- \$303.6 million in budgeted waivers
- An increase of \$16.1 million, or 5.6%.
- Represents 9.9% of total budgets

Resident Tuition Waiver Policy

- Institutions are authorized to award scholarships to Oklahoma residents from the Part I E&G budget in the form of resident tuition waivers, provided the total amount awarded does not exceed **five percent (5%)** of the total Part 1 E&G budget for the current year. Students will be disqualified from receiving a tuition waiver based on immigration status if the student does not qualify for resident tuition pursuant to 70 O.S. §§ 3242 and 324.2, *adopted in February 2024*

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 and permanent change in FY24 to support retention strategies.
- 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

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)

Utilization of FY2026 Budgeted Award Amounts Authorized Within 5.0% Resident Cap

	Average	High	Low
Research	71.0%	78.8%	64.3%
Regionals	75.9%	100.0%	31.5%
Community Colleges	52.2%	90.5%	24.8%
Technicals	45.7%	60.5%	29.6%
Constituents	2.1%	55.7%	0.0%

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

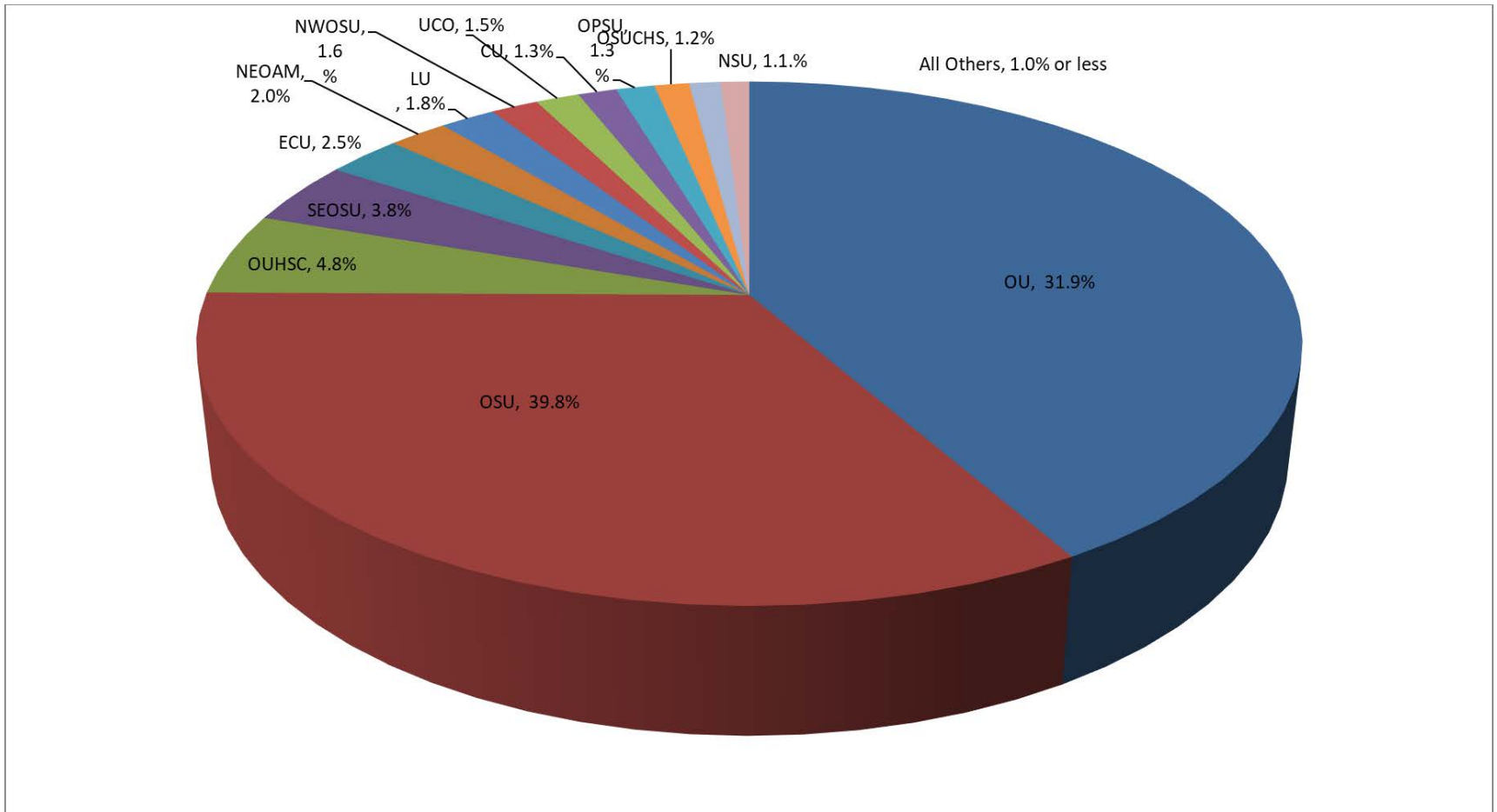
- Senior Citizens – Audit
- Prisoners of War/Missing in Action
- Dependents: OK Peace Officers/Firefighters/EMTs
- Graduate Teaching & Research Assistants
- Exchange Students on Reciprocal Basis
- Academic Scholars Program
- Regional University Baccalaureate
- Students Called to Active Duty and Families- (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 FY2025

\$185.6
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. Several 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 FY2026, we are funded at 100% of actual waivers for Senior and Junior High School participants.

Growth in Concurrent Enrollment

<u>College or University Tier</u>	<u>2013-14</u>	<u>2014-15</u>	<u>2015-16</u>	<u>2016-17</u>	<u>2017-18</u>	<u>2018-19</u>	<u>2019-20</u>	<u>2020-21</u>	<u>2021-22</u>	<u>2022-23</u>
Regional Universities	2,245	2,162	2,539	2,735	2,880	2,656	2,929	2,580	2,647	3,229
Research Universities	209	207	294	403	435	447	423	831	577	652
Community Colleges	10,147	10,267	9,505	9,640	9,931	10,133	11,025	11,225	12,071	13,111
All Oklahoma Public Colleges and Universities	12,601	12,636	12,338	12,778	13,246	13,236	14,377	14,636	15,295	16,992

Source: OSRHE UDS Record S

Concurrently Enrolled High School Students generated over 158,204 credit hours during the 22 – 23 academic year.

Contact Information:

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Finance**

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