



# Oregon

Kate Brown, Governor

**Higher Education Coordinating Commission**

Ben Cannon, Executive Director  
255 Capitol Street NE, Third Floor  
Salem, OR 97310  
[www.oregon.gov/HigherEd](http://www.oregon.gov/HigherEd)

March 29, 2017

Co-Chair, Senator Rod Monroe  
Co-Chair, Representative Barbara Smith Warner  
Joint Committee on Ways and Means, Subcommittee on Education

Dear Co-Chairs Monroe and Smith Warner,

Thank you for the opportunity to answer questions that arose during the March 28 Higher Education Coordinating Commission's presentation to the Ways and Means Subcommittee on Education.

In regards to the increase in total postsecondary degrees awarded, Representative Lively asked what proportion of Oregon degree growth was related to students returning to postsecondary education from the workforce, versus students who enrolled straight out of high school. We have compared degree completion increases between the time period stretching from academic years 2009-10 through 2012-13 to the time period from academic years 2006-07 through 2008-09. We have defined returning students as those who completed their degree or certificate at age 25 or older.

- For undergraduate certificates, 72% of the increase in completions came from non-traditionally aged students;
- For associate degrees, 65.2% of the increase in completions came from non-traditionally aged students;
- For bachelor's degrees, 41.2% of the increase in completions came from non-traditionally aged students.

Co-Chair Smith Warner asked how State Higher Education Executive Officers (SHEEO) calculated inflation for the purposes of the chart presented on slide 50 comparing state appropriations and net tuition per FTE over time. SHEEO uses the "Higher Education Cost Adjustment (HECA)", a methodology they have designed. HECA consists of a combination of two federally developed and maintained price indexes: the Employment Cost Index (ECI) and the Gross Domestic Product Implicit Price Deflator (GDP IPD). Specifically, 75% of the HECA is based on ECI and 25% is based on GDP IPD in order to reflect SHEEO's view that faculty and

staff salaries generally account for about 75% of university expenditures. HECA is slightly lower than CPI in most years, although relatively close to it.

When considering slides on state appropriations for public universities and resident enrollment over time, Senator Roblan requested clarification on the definition of resident students. Oregon public universities use a uniform set of standards for determining resident status and eligibility for resident tuition. As described in the attached "Interinstitutional Residency Compact" (Appendix A):

*"An Oregon resident is a financially independent person who, prior to the term for which Oregon resident classification is requested, has both; (a) established and maintained a Domicile in Oregon for 12 consecutive months; and (b) during that period, has been primarily engaged in activities other than those of being a college student."*

Representative Hernandez observed that the HECC Key Performance Metrics (KPMs) do not specifically address equity. While not explicitly called out in the KPMs, equity is a central focus at the HECC. We are committed to improving success for student populations who are historically underserved in higher education, and ensuring environments are conducive to optimum learning. Guided by the [Equity Lens](#) and [Strategic Plan](#), the HECC commitment to equity informs policy decision making, funding recommendations, [ongoing programs, and special initiatives](#). We would be happy to work with the Subcommittee in revising the KPMs in order to specifically emphasize the HECC commitment to equity.

Finally, we attach a revised version of a slide (Appendix B) we presented on Monday, March 26. This has been updated to correct the scale of the horizontal axis, and uses more reliable wage data than the previous version we presented.

If you have any further questions, please do not hesitate to contact Kyle Thomas, Director of Legislative and Policy Affairs, at [kyle.thomas@state.or.us](mailto:kyle.thomas@state.or.us) or at 503-480-9596.

Sincerely,



Ben Cannon  
Executive Director

**APPENDIX A.**

Interinstitutional Residency Compact

## INTERINSTITUTIONAL RESIDENCY COMPACT

WHEREAS, the Oregon Legislature has enacted Senate Bill 270 (2013), which allows Oregon public universities to separate from the Oregon University System and create their own governing boards; and

WHEREAS, all Oregon public universities will separate from the Oregon University System and establish their own governing boards pursuant to SB 270 at varying dates in the future, but will remain within the Oregon University System until their respective separation dates; and

WHEREAS, the Oregon University System has enacted administrative rules codifying the standards for classifying students as Oregon residents or nonresidents for tuition purposes (OAR 580-010-0029 to OAR 580-10-0040) and the administrative process for making those classifications (OAR 580-010-0041 to OAR 580-10-0045); and

WHEREAS, Senate Bill 270 empowers universities with governing boards (1) to enter into any and all contracts and agreements that in the judgment of the university or the governing board is necessary or appropriate and (2) to establish policies for the organization, administration and development of the university, which powers include making determinations regarding classification of students as Oregon residents or nonresidents for tuition purposes and specifying the process therefor; and

WHEREAS, there are significant advantages to the public, Oregon public universities, and their students in continuing to apply uniform residency standards and maintain a uniform process for residency determinations;

NOW, THEREFORE, the parties agree as follows:

1. The parties to this Compact are: Eastern Oregon University, Oregon Institute of Technology, Oregon State University, Portland State University, Southern Oregon University, the University of Oregon, and Western Oregon University.
2. The parties agree to use a uniform set of standards (the "Residency Standards") for determining whether a student is a resident for purposes of eligibility for resident tuition. Those standards are set forth in the attached Appendix I. The parties agree to make all reasonable efforts to interpret the Residency Standards in a uniform manner and consistently with past interpretations.
3. The parties agree to use a uniform procedure (the "Residency Procedure") for making residency determinations. Those procedures are set forth in the attached Appendix II. The parties agree to make all reasonable efforts to interpret the Residency Procedure in a uniform manner and consistently with past interpretations.
4. For the period of time that any party remains part of the Oregon University System, that party may comply with this Compact by continuing to implement the Residency Standards and the Residency Procedure in the form of the existing administrative rules. Nonmaterial differences between the administrative rules and the Residency Standards or the Residency Procedure shall not be considered a breach of this Compact.

5. Any amendments to the Residency Standards or the Residency Procedure may be made by written agreement. The parties agree to make all reasonable efforts to reach consensus regarding any amendments.

- a. If the parties are unable to agree on amendments to the Residency Standards, parties who do not agree with the majority consensus will provide written notice of withdrawal from this Compact in the manner described in Section 6. Such withdrawal shall be without penalty to any party. If there is no majority consensus, this Agreement shall be dissolved.
- b. If the parties are unable to agree on amendments to the Residency Procedure, parties who do not agree with the majority consensus may establish separate residency procedures on written notice to all other parties. Unless those parties specifically withdraw from this Compact as a whole, those parties will remain bound by Paragraphs 1, 2, 4, 5, 6, 7, and 8 of this Compact, including the obligation to make all reasonable efforts to interpret the Residency Standards in a uniform manner and consistently with past interpretations.

6. Notwithstanding any other part of this Compact, any party may withdraw from this Compact without penalty of any kind on written notice to all other parties no later than February 1st of any year. Withdrawal from this Compact shall be effective for the following fall term.

7. Notices under this Compact shall be effective when sent via first class mail to the business address of each authorized representative who signs the Agreement below, or his or her successor if any.

8. In the course of implementing this Compact, the parties may, by necessity, have access to student education records that are subject to the Family Educational Rights and Privacy Act (FERPA), 20 U.S.C. 1232g, et seq. and the regulations promulgated thereunder. To the extent that is the case, each party to this Compact is deemed to be a "school official," as that term is defined in FERPA and shall comply with the requirements of FERPA. The parties shall not use student education records disclosed pursuant to this Compact for any purpose other than in the performance of this Compact, and shall not re-disclose such student education records, except as required by law.

9. This Compact shall be effective as to each party on the date its authorized representative signs it.

Through the signatures of their authorized representatives below, each party agrees to the above terms, including Appendix I and Appendix II.

\_\_\_\_\_  
Eastern Oregon University

\_\_\_\_\_  
Date

By: \_\_\_\_\_ Its \_\_\_\_\_



\_\_\_\_\_  
Oregon State University

\_\_\_\_\_  
Date

By: \_\_\_\_\_ Its \_\_\_\_\_

\_\_\_\_\_  
Oregon Institute of Technology

\_\_\_\_\_  
Date

By: \_\_\_\_\_ Its \_\_\_\_\_

\_\_\_\_\_  
Portland State University

\_\_\_\_\_  
Date

By: \_\_\_\_\_ Its \_\_\_\_\_

*J. Klein*  
\_\_\_\_\_  
Southern Oregon University

*6/30/14*  
Date

\_\_\_\_\_

By: *James Klein* Its *Provost*

\_\_\_\_\_  
University of Oregon

\_\_\_\_\_  
Date

By: \_\_\_\_\_ Its \_\_\_\_\_

\_\_\_\_\_  
Western Oregon University

Date

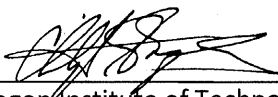
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By: \_\_\_\_\_ Its \_\_\_\_\_

\_\_\_\_\_  
Oregon State University

\_\_\_\_\_  
Date

By: \_\_\_\_\_ Its \_\_\_\_\_

  
\_\_\_\_\_  
Oregon Institute of Technology

\_\_\_\_\_  
June 30, 2014  
Date

By: Christopher G. Maples Its President

Portland State University

Date

By: \_\_\_\_\_ Its \_\_\_\_\_

\_\_\_\_\_  
Southern Oregon University

Date

By: \_\_\_\_\_ Its \_\_\_\_\_

\_\_\_\_\_  
University of Oregon

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Date

By: \_\_\_\_\_ Its \_\_\_\_\_

\_\_\_\_\_  
Western Oregon University

Date

By: \_\_\_\_\_ Its \_\_\_\_\_



Edward J. Ray  
Oregon State University

6/30/14  
Date

By: Edward J. Ray Its President

\_\_\_\_\_  
Oregon Institute of Technology

\_\_\_\_\_  
Date

By: \_\_\_\_\_ Its \_\_\_\_\_

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Portland State University

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Oregon State University

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Oregon Institute of Technology

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Date

By: \_\_\_\_\_ Its \_\_\_\_\_

\_\_\_\_\_  
*Sona K. Andrews*

\_\_\_\_\_  
*6/30/17*

Portland State University

\_\_\_\_\_  
Date

By: *Sona K. Andrews* Its *Provost*

\_\_\_\_\_  
Southern Oregon University

\_\_\_\_\_  
Date

By: \_\_\_\_\_ Its \_\_\_\_\_

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University of Oregon

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By: \_\_\_\_\_ Its \_\_\_\_\_

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Southern Oregon University

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Date

By: \_\_\_\_\_ Its \_\_\_\_\_

Michael Gothfredson  
University of Oregon

6/30/14  
Date

By: Michael Gothfredson Its President

\_\_\_\_\_  
Western Oregon University

\_\_\_\_\_  
Date

By: \_\_\_\_\_ Its \_\_\_\_\_

\_\_\_\_\_  
Oregon State University

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By: \_\_\_\_\_ Its \_\_\_\_\_

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Oregon Institute of Technology

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By: \_\_\_\_\_ Its \_\_\_\_\_

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By: \_\_\_\_\_ Its \_\_\_\_\_

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Southern Oregon University

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Date

By: \_\_\_\_\_ Its \_\_\_\_\_

\_\_\_\_\_  
University of Oregon

\_\_\_\_\_  
Date

By: \_\_\_\_\_ Its \_\_\_\_\_

*Western Oregon University by M. J. Weiss* *June 30, 2014*  
\_\_\_\_\_  
Western Oregon University Date

By: *M.J. Weiss* Its *President*

*COUS INTER INSTITUTIONAL  
RESIDENCY COMPACT)*

## APPENDIX I: Residency Standards

### A. Definitions

For the purpose of these Residency Standards the following definitions apply:

1. "Domicile" is a person's true, fixed, and permanent home and place of habitation. It is the place where a person intends to remain and to which the person expects to return when the person leaves without intending to establish a new domicile elsewhere. In order to establish a domicile in Oregon, a person must maintain a predominant physical presence in Oregon for 12 consecutive months after moving to the state.
2. A "financially independent person" is a person who, at the time of application for residency status: (a) declares himself or herself to be financially independent; (b) has not been claimed as a dependent during the immediately preceding tax year, and will not be claimed as a dependent during the current tax year, on the federal or state income tax returns of any other person; and (c) has not received in the immediately preceding calendar year, and will not receive during the current calendar year, one-half or more of his or her support, in cash or in kind, from another person or persons, except for support received from his or her spouse.
3. A "financially dependent person" is a person who, at the time of application for residency status: (a) declares himself or herself to be financially dependent; and (b) has been claimed as a dependent on the federal and state income tax returns of another person during the immediately preceding tax year.
4. "University" or "Universities" are Oregon public universities listed in ORS 352.002.
5. "Residency Procedure" is the procedure attached as Appendix II to the Interinstitutional Residency Compact, including any subsequent amendments as described in that Compact.

### B. Determination of Residence

1. For purposes of admission and instruction fee assessment, Universities who apply these Residency Standards shall classify a student as Oregon resident or nonresident<sup>1</sup>. In determining resident or nonresident classification, the primary issue is a person's intent in coming to Oregon. Intent is inferred from a person's conduct and history as they relate to the requirements of these Residency Standards. If a person is in Oregon primarily for the purpose of obtaining an education, that person will be considered a nonresident. It is possible for an individual to qualify as a resident of Oregon for

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<sup>1</sup> Oregon law establishes two exemptions from non-resident tuition. ORS 351.641 provides an exemption for students who are not US citizens or lawful permanent residents, but who meet certain other qualifications, including attendance at an Oregon school and receiving a high school diploma or equivalent in Oregon. ORS 352.375 provides an exemption for qualified veterans of the U. S. Armed Forces.

Students who qualify for either of these exemptions are not considered Oregon residents under these Residency Standards. **However, they are exempt from paying non-resident tuition.** Questions about these exemptions and the process for establishing eligibility should be directed to the appropriate official at each university.

purposes of voting or obtaining an Oregon driver's license and not meet the residency requirements established by these Residency Standards.

2. An Oregon resident is a financially independent person who, prior to the term for which Oregon resident classification is requested, has both: (a) established and maintained a Domicile in Oregon for 12 consecutive months; and (b) during that period, has been primarily engaged in activities other than those of being a college student.

3. A student may be considered primarily engaged in educational activities regardless of the number of hours for which the student is enrolled. However, a student who is enrolled for more than 8 hours in any semester or quarter during the 12-month period referred to in section B.2 of these Standards shall be presumed to be in Oregon for primarily educational purposes. Such period of enrollment shall not be counted toward the establishment of a bona fide domicile of 12 consecutive months in this state unless the student proves, in fact, establishment of a bona fide domicile in this state primarily for purposes other than educational.

4. An Oregon resident is also a financially dependent person who is claimed as a dependent by another person who has both: (a) established and maintained an Oregon Domicile for 12 consecutive months; and (b) during that period, has been primarily engaged in activities other than those of being a college student.

5. A financially dependent person who is claimed as a dependent by another person who has not established and maintained an Oregon domicile shall be presumed to be a non-resident. This presumption may be overcome by evidence of the student's long-standing presence in Oregon and demonstration of other factors under Section C of these Standards.

6. The criteria for determining Oregon resident classification shall also be used to determine whether a person who has moved from Oregon has established a non-Oregon residence.

7. If institution records show that the residence of a student or the person upon whom the student is dependent is outside of Oregon, the student shall continue to be classified as a nonresident until entitlement to resident classification is shown. The burden of showing that the residence classification should be changed is on the student requesting the change.

8. Notwithstanding section B.4 of these Standards, a student who is financially dependent on a non-Oregon resident may nonetheless be considered an Oregon resident if the student resides in Oregon for at least 12 consecutive months with a parent or legal guardian who has both: (a) established and maintained an Oregon Domicile for 12 consecutive months; and (b) during that period, has been primarily engaged in activities other than those of being a college student.

### **C. Residency Consideration Factors**

1. The following factors, although not necessarily conclusive or exclusive, have probable value in support of a claim for Oregon resident classification:

- a. Reside in Oregon for 12 consecutive months prior to the beginning of the term for which resident classification is sought and during that period be primarily engaged in activities other than those of a college student;
- b. Reliance upon Oregon resources for financial support;
- c. Domicile in Oregon of persons legally responsible for the student;
- d. Acceptance of an offer of permanent employment in Oregon; and
- e. Ownership by the person of his or her living quarters in Oregon.

2. The following factors, standing alone, do not constitute sufficient evidence to effect classification as an Oregon resident:

- a. Voting or registration to vote;
- b. Employment in any position normally filled by a student;
- c. The lease of living quarters;
- d. Admission to a licensed practicing profession in Oregon;
- e. Automobile registration;
- f. Public records, for example, birth and marriage records, Oregon driver's license;
- g. Continuous presence in Oregon during periods when not enrolled in school;
- h. Ownership of property in Oregon or the payment of Oregon income or other Oregon taxes; or
- i. Domicile in Oregon of the student's spouse.

3. Reliance upon non-Oregon resources for financial support is an inference of residency in another state.

**D. Evidence of Financial Dependency**

In determining whether a student is financially dependent, a student must provide:

- a. Evidence of established Domicile of the person claiming the student as a dependent; and
- b. The identification of the student as a dependent on the federal and state income tax returns of the person claiming the student as a dependent. Additional documentation to

substantiate dependency during the current calendar year may be required at a later time if deemed necessary by the institution.

c. A student who provides evidence that he or she is a financially dependent person under these rules shall not be required to establish a 12-month domicile prior to classification of resident status, provided such a student may not be classified as a resident while receiving financial assistance from another state or state agency for educational purposes.

#### **E. Residence Classification of Armed Forces Personnel**

1. For purposes of these Standards, members of the armed forces means officers and enlisted personnel of:

a. The Army, Navy, Air Force, Marine Corps, and Coast Guard of the United States;

b. Reserve components of the Army, Navy, Air Force, Marine Corps, and Coast Guard of the United States;

c. The National Guard of the United States and the Oregon National Guard.

2. Notwithstanding Section B, active members of the armed forces and their spouses and dependent children shall be considered residents for purposes of an institution's tuition and mandatory enrollment fees if the members:

a. Reside in this state while assigned to duty at any base, station, shore establishment, or other facility in this state;

b. Reside in this state while serving as members of the crew of a ship that has an Oregon port of shore establishment as its home port or permanent station; or

c. Reside in another state or a foreign country and file Oregon state income taxes no later than 12 months before leaving active duty.

3. An Oregon resident entering the armed forces retains Oregon residence classification until it is voluntarily relinquished.

4. An Oregon resident who has been in the armed forces and assigned on duty outside of Oregon, including a person who establishes residency under section E.2.c of these Standards, must, within a reasonable time, demonstrate intent to retain classification as an Oregon resident. Such intent may be shown by returning to Oregon within six months after completing service in the armed forces.

5. A person who continues to reside in Oregon after separation from the armed forces may count the time spent in the state while in the armed forces to support a claim for classification as an Oregon resident.



6. The dependent child and spouse of a person who is a resident under Section E.2 of these Standards shall be considered an Oregon resident. "Dependent child" includes any child of a member of the armed forces who:

- a. Is under 18 years of age and not married, otherwise emancipated or self-supporting; or
- b. Is under 23 years of age, unmarried, enrolled in a full-time course of study in an institution of higher learning, and dependent on the member for over one-half of his/her support.

**F. Residence Classification of Members of Oregon Tribes**

1. Students who are enrolled members of federally recognized tribes of Oregon or who are enrolled members of a Native American tribe which had traditional and customary tribal boundaries that included parts of the state of Oregon or which had ceded or reserved lands within the state of Oregon shall be assessed resident tuition regardless of their state of residence.

2. For purposes of these Standards, the federally recognized tribes of Oregon are:

- a. Burns Paiute Tribe;
- b. Confederated Tribes of Coos, Lower Umpqua and Siuslaw;
- c. Confederated Tribes of Grand Ronde Community of Oregon;
- d. Confederated Tribes of Siletz Indians of Oregon;
- e. Confederated Tribes of the Umatilla Indian Reservation;
- f. Confederated Tribes of the Warm Springs Indian Reservation;
- g. Coquille Indian Tribe;
- h. Cow Creek Band of Umpqua Indians;
- i. Klamath Tribes.

2. For purposes of this rule these Standards, the Native American tribes which had traditional and customary tribal boundaries that included parts of the state of Oregon or which had ceded or reserved lands within the state of Oregon are:

- a. CALIFORNIA:
  - A. Benton Paiute Tribe;
  - B. Big Bend Rancheria;
  - C. Big Lagoon Rancheria;

- D. Blue Lake Rancheria;
- E. Bridgeport Indian Colony;
- F. Cedarville Rancheria;
- G. Fort Bidwell Indian Tribe;
- H. Hoopa Valley Tribe;
- I. Karuk Tribe of California;
- J. Likely Rancheria;
- K. Lookout Rancheria;
- L. Lytton Rancheria;
- M. Melochundum Band of Tolowa Indians;
- N. Montgomery Creek Rancheria
- O. Pit River Tribe;
- P. Quartz Valley Indian Community;
- Q. Redding Rancheria;
- R. Roaring Creek Rancheria;
- S. Smith River Rancheria;
- T. Susanville Rancheria; Tolowa-Tututni Tribe;
- U. Winnemucca Colony;
- V. XL Ranch.;
- W. Yurok Tribe.

b. IDAHO:

- A. Nez Perce Tribe of Idaho;
- B. Shoshoni-Bannock Tribes.

c. NEVADA:

- A. Duck Valley Shoshone-Paiute Tribes;

- B. Fallon Paiute-Shoshone Tribe;
  - C. Fort McDermitt Paiute-Shoshone Tribe;
  - D. Lovelock Paiute Tribe;
  - E. Pyramid Lake Paiute Tribe;
  - F. Reno-Sparks Indian Colony;
  - G. Summit Lake Paiute Tribe;
  - H. Walker River Paiute Tribe;
  - I. Winnemucca Indian Colony;
  - J. Yerington Paiute Tribe.
- d. OKLAHOMA: Modoc Tribe of Oklahoma.
- e. WASHINGTON:
- A. Chehalis Community Council;
  - B. Colville Confederated Tribes;
  - C. Quinault Indian Nation;
  - D. Shoalwater Bay Tribe;
  - E. Yakama Indian Nation.

4. A student seeking to be assessed resident tuition and mandatory enrollment fees under these Standards shall submit, following procedures prescribed by the University where the student seeks to enroll, a photocopy of tribal enrollment which documents tribal membership.

**G. Residence Classification of Non-Citizens**

1. A person who is not a citizen of the United States may be considered an Oregon resident if the person qualifies as a resident under Section B and is one of the following:

- a. A lawful permanent resident. The date of approval of lawful permanent residency shall be the earliest date upon which the 12-month residency requirements under Section B may begin to accrue.
- b. An immigrant granted refugee or political asylum in the United States. The date of approval of political asylum or refugee status shall be the earliest date upon which the 12-month residency requirements under Section B may begin to accrue.

c. A person holding one of the following non-immigrant visa classifications: A, E, G, H-1B, H-1C, the spouse or child of a person holding an H-1B or H-1C visa, I, K, L, NATO, O, R, S, T, TN, U, or V. The date of the issuance of a visa for one of these classifications shall be the earliest date upon which the 12-month residency requirements under Section B\_ may begin to accrue. A person possessing a non-immigrant or temporary visa that is not identified under these Standards shall not be considered an Oregon resident under this Section G.1.c.

## APPENDIX II: Residency Procedure

### **A. Definitions**

Definitions in the Residency Standards shall also apply to this Residency Procedure.

### **B. Changes in Residence Classification**

1. Unless otherwise specified in the Residency Standards, if an Oregon resident student enrolls in an institution outside of Oregon and later seeks to enroll in a University that applies these Residency Standards, the residence classification of that student shall be re-examined and determined on the same basis as for any other person.
2. A student who becomes eligible for resident tuition during a term of enrollment at a University will not qualify for resident tuition until the beginning of the next term.
3. Once established, classification as a resident continues so long as the student remains in continuous academic year enrollment in the classifying University.
4. A person who seeks eligibility for resident tuition under these rules shall complete and submit a notarized Residence Information Affidavit. The affidavit and all required supportive documents and materials must be submitted by the last day to register for the term in which resident status is sought.
5. Universities that apply this Residency Procedure are only bound by determinations of residency that follow this Procedure, including timely submittal of the notarized affidavit.

### **C. Review of Residence Classification Decisions**

1. An interinstitutional residency committee (IRC) is established consisting of the officers who determine student residence classification at each University that applies this Residency Procedure. The chair of the committee shall rotate among the Universities with no chair serving more than two consecutive years. A majority of the members of the Committee shall constitute a quorum. A majority of a quorum may make recommendations.
2. Residence cases of unusual complexity, especially where there may be conflict of rules, may be referred by the originating classification officer to the IRC for its recommendation to the registrar or designee.
3. Any person who is aggrieved by the originating classification officer's classification decision may, within ten days of the date of mailing or other service of the classification decision, request that the IRC review the classification and make recommendations to the registrar or designee of the originating university. The appeal must be in writing and shall be filed with the originating University. An aggrieved person may supply written statements to the IRC for consideration in reviewing the case and may also make an oral presentation to the IRC on a date to be scheduled by the IRC. The IRC shall make a recommendation to the registrar or designee of the originating University. That registrar or designee shall then issue a decision. The decision of the registrar or designee shall be final unless appealed.

4. A person dissatisfied with the decision of the registrar or designee may, within ten days of the date of the mailing or other service of the decision, appeal the decision to the president or designee of the originating University. An appeal shall be in writing only. The decision of the president or designee shall be final.

5. A person granted a meritorious hardship exception to residency under the Oregon Administrative Rules regarding residency prior to July 1, 1990, shall not lose the exception solely because of the repeal of the exception authorization.



**For office use only**

Status:  DEP  INDEP      Date: \_\_\_\_\_ Effective Term: \_\_\_\_\_  Resident  Non-Resident

Residence Classification Officer: \_\_\_\_\_

Notes: \_\_\_\_\_

## Residence Information Affidavit

(Please print or type)

### Section 1: Applicant Background

Name (print) \_\_\_\_\_ Phone ( \_\_\_\_\_ ) \_\_\_\_\_  
Last                      First                      Middle

Present Mailing Address \_\_\_\_\_  
Number & Street                      City                      State                      Zip

Email \_\_\_\_\_ Student ID Number \_\_\_\_\_

Permanent Mailing Address \_\_\_\_\_  
Number & Street                      City                      State                      Zip

Age \_\_\_\_\_ Date of Birth \_\_\_\_\_ Place of Birth \_\_\_\_\_

**1** For what term are you seeking residence classification?  Fall  Winter  Spring  Summer Year \_\_\_\_\_

**2** Have you previously applied at this institution for a change in residence status?  Yes  No  
 If "yes," indicate term \_\_\_\_\_ and year \_\_\_\_\_

**3** Where and when did you graduate from high school? City/State \_\_\_\_\_ Grad Date \_\_\_\_\_

**4** When did your most recent continuous stay in Oregon begin? Month \_\_\_\_\_ Day \_\_\_\_\_ Year \_\_\_\_\_

**5** Since your most recent continuous stay in Oregon began, have you attended a private or public college, university or community college?  
 Yes  No

**6** If you answered "yes" to question 5, please indicate the institution(s), term, year and hours of enrollment in the table provided.  
 (Attach additional pages if necessary)

Name of Institution	Term	Year	Hours

**7** Have you ever paid in-state tuition at a public college or university (including community college)?  Yes  No

**8** If "yes" to question 7, please indicate where and dates of attendance.

From \_\_\_\_\_ to \_\_\_\_\_ Name of institution \_\_\_\_\_ Location \_\_\_\_\_

From \_\_\_\_\_ to \_\_\_\_\_ Name of institution \_\_\_\_\_ Location \_\_\_\_\_

**9** Have you attended an Oregon higher education institution as a National Exchange, WICHE/WUE, or Reciprocity student?  
 Yes  No If "yes," give program and dates \_\_\_\_\_

**10** Are you a citizen of the USA?  Yes  No If "no," you **must** attach a copy of both sides of Resident Alien Card, Form I-94, or other documentation reflecting your visa type or current status.

**11** Have you received financial assistance from a state or government unit or agency (other than Federal Financial Aid) during the past 12 months?  
 Yes  No If "yes," indicate state, agency, and explain: \_\_\_\_\_

Will you be receiving such assistance during the next 12 months?  Yes  No

If "yes," indicate state, agency, type of assistance, disbursement date, and explain: \_\_\_\_\_

**12** List totals of your expenses and financial resources for the **past 12 months**:

**a. Expenses:**

Total Expenses: (includes rent/mortgage, utilities, car payment, insurance, gas, groceries, spending money, etc.) \$ \_\_\_\_\_

**b. Financial Resources:**

<b>Self-Support:</b> (includes wages, salary, commission, unemployment benefits, alimony, etc.)	\$	<b>Identify source(s):</b>
<b>Support from parent, guardian or other person not including spouse:</b> (includes room and board, tuition assistance, other general monetary support)	\$	<b>Identify relationship:</b>
<b>Support received from federal or state financial aid:</b>	\$	<b>Identify type of aid:</b>
<b>Other sources of support:</b> (includes spousal income, gifts, loans, savings, inheritance, trusts, stocks, VA benefits)	\$	<b>Identify specific source(s):</b>



## Section 2: Dependent or Independent

**A** Are you applying for resident status as a **dependent** student whose parent, legal custodian, or other person upon whom you are dependent, has maintained a bona fide domicile in the State of Oregon for the past year?  Yes  No

If "yes," your parent, legal custodian, or other person upon whom you are dependent, must complete Section 3 of this form providing proof of his/her Oregon domicile.

Verification of your dependent status must be documented by submitting a true and correct copy of that person's **state and federal income tax returns** (top portion listing exemptions and signature section only)\* for the most recent tax year.

**B** Are you applying for resident status as a financially **independent** student?  Yes  No

If "yes," you must complete the remainder of this form.

1 Student's sworn statement:

By signing this affidavit (see "Final Steps" section) as an independent student, I swear that I will not be claimed as a dependent for federal and state income tax purposes by any person except myself or my spouse for the current tax year and for the tax year immediately prior to the year in which this application is made; and I have not received and will not receive financial assistance in cash or in kind of an amount equal to or greater than one-half of my support from another person or persons, except my spouse, during the current year or the calendar year immediately prior to the year in which this application is made.

2 To substantiate your financial independence, you are required to submit appropriate documentation:

- (a) A true and correct copy of your state and federal income tax returns\* for the tax year immediately prior to the year in which this application is made. If you did not file state and federal income tax returns because of minimal or no taxable income, documented information concerning the receipt of such nontaxable income must be submitted.
- (b) A true and correct copy of your W2 form filed for the previous tax year.
- (c) Other documented financial resources. Such other resources may include, but are not limited to, the sale of personal or real property, inheritance, trust fund, state or financial assistance, gifts, loans, earnings, or savings of the spouse of a married student.
- (d) For applicants under the age of 24, a true and correct copy of the first and signature page of the state and federal tax returns of your parents, or legal custodian(s), for the tax year immediately prior to the year in which this application is made.

\* (The extent of disclosure required concerning state and federal tax returns is limited to the number of dependents claimed and the signature of the taxpayer and shall not require disclosure of financial information contained in the returns.)

## Section 3: Proof of Residency

This section is being completed and signed by  Student  Parent  Legal Custodian  Other person upon whom the student is dependent  
(Note: Not to be completed by spouse except for military.)

**Do not leave any questions blank. No action nor decision can be made unless all questions are completed and all required documentary evidence is submitted.**

1 Name \_\_\_\_\_ Phone ( \_\_\_\_\_ ) \_\_\_\_\_  
*Last* *First* *Middle*

Address \_\_\_\_\_  
*Number & Street* *City* *State* *ZIP*

2 Date of arrival in Oregon to establish a permanent home: Mo. \_\_\_\_\_ Day \_\_\_\_\_ Yr. \_\_\_\_\_ Why you moved to Oregon \_\_\_\_\_

3 Are you a citizen of the USA?  Yes  No **If "no," you must attach a copy of both sides of your Resident Alien Card, Form I-94, or other documentation reflecting your visa type or current status.**

4 Are you currently on active duty, or a member of a reserve component, of the U.S. armed forces (Army, Navy, Air Force, Marine Corps, Coast Guard, National Guard)?  Yes  No **If "no," skip to question 5.**

(a) If "yes" to question 4, are you stationed and residing in Oregon?  Yes  No

If "yes," you must attach documentation confirming your current military assignment status (DD220, military orders or statement from commanding officer).

(b) If "yes" to question 4, but have not been stationed/residing in Oregon, indicate most recent duty station:

State or country \_\_\_\_\_ from \_\_\_\_\_ to \_\_\_\_\_

(c) If "yes" to question 4, have you ever filed an Oregon income tax return?  Yes  No  
Date Oregon income tax return(s) was/were filed \_\_\_\_\_ If "yes," you must attach copy of most recent Oregon income tax return(s).

(d) From what state did you enter the military? \_\_\_\_\_ Discharge Date \_\_\_\_\_ (Provide copy of DD214 form.)

5 Are you the spouse or dependent child of an armed forces member assigned to duty in Oregon?  Yes  No

6 Do you  own  rent your housing? If not, explain how your housing is provided \_\_\_\_\_  
**You must attach proof of your presence in Oregon the past 12 months** (e.g. copies of rent receipts, lease or home purchase agreements, property tax statement, cancelled rent checks, letters from landlords).

7 List chronologically your **employment, activity or physical presence** for the past two years, giving exact information as asked below. You must account for entire two year period. (Add additional pages if necessary)

Dates		Location		Employer or Activities	
from _____ <i>mo./ day/yr.</i>	to _____ <i>mo./ day/yr.</i>	_____	_____	_____	_____
from _____ <i>mo./ day/yr.</i>	to _____ <i>mo./ day/yr.</i>	_____	_____	_____	_____
from _____ <i>mo./ day/yr.</i>	to _____ <i>mo./ day/yr.</i>	_____	_____	_____	_____
from _____ <i>mo./ day/yr.</i>	to _____ <i>mo./ day/yr.</i>	_____	_____	_____	_____

8 If you were out of Oregon since your continuous presence began, give dates and reasons for your absence.

from _____ <i>mo./ day/yr.</i>	to _____ <i>mo./ day/yr.</i>	_____	_____	_____
from _____ <i>mo./ day/yr.</i>	to _____ <i>mo./ day/yr.</i>	_____	_____	_____
from _____ <i>mo./ day/yr.</i>	to _____ <i>mo./ day/yr.</i>	_____	_____	_____

9 Are you registered to vote?  Yes  No If "yes," where/when \_\_\_\_\_

If "yes", you must attach copy of your current voter's registration card.

10 Do you own or use any motor vehicles, mobile homes, trailers or boats?  Yes  No

If "yes", you must attach a copy of your current vehicle registration (not the title).

Have any of these vehicles previously been registered in another state?  Yes  No

11 Do you have a driver's license or state issued ID?  Yes  No

If "yes," you must attach a copy of your current driver's license or state issued ID.

12 List years for which you filed an Oregon Income Tax Return \_\_\_\_\_

**You must attach a copy of your taxes filed in the state of Oregon.** (Note: See Section 2 for documentation of tax returns.)

13 Is income being withheld from your earnings for Oregon income taxes?  Yes  No

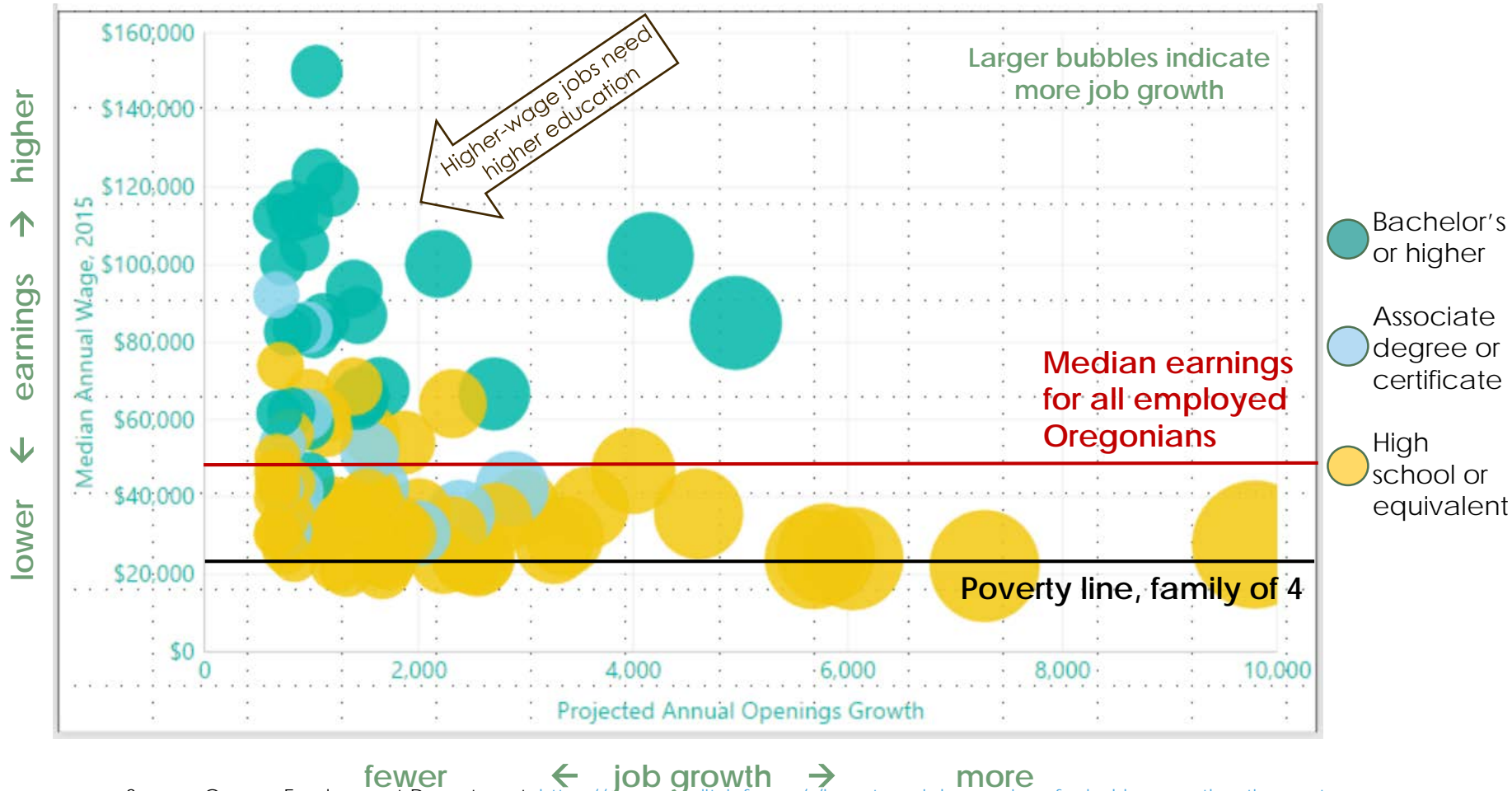
14 Do you intend to file an Oregon Income Tax Return this year?  Yes  No If "no," why not? \_\_\_\_\_

## **APPENDIX B.**

Slide: For Family-Wage Jobs, Most Projected Growth Relies on Postsecondary Education

# FOR FAMILY-WAGE JOBS, MOST PROJECTED GROWTH RELIES ON POSTSECONDARY EDUCATION

- Oregon projected job growth, by minimal required education and median earnings
- 100 occupations projected to grow the most represent 70% of all job growth 2014-24



Source: Oregon Employment Department, <https://www.qualityinfo.org/-/long-term-job-openings-fueled-by-growth-retirements> ; Bureau of Labor Statistics, *Occupations with the most job growth projected 2014-2024*, [https://www.bls.gov/emp/ep\\_table\\_104.htm](https://www.bls.gov/emp/ep_table_104.htm) ; Bureau of Labor Statistics, *May 2015 State Occupational Employment and Wage Estimates Oregon*, [https://www.bls.gov/oes/current/oes\\_or.htm](https://www.bls.gov/oes/current/oes_or.htm) . Note: Wages for physicians and surgeons is capped at \$150,000 for slide formatting.