



Proposed  
2009-10 University Budget Plan  
and  
Tuition and Fees

University of Mary Washington

Board of Visitors

May 8, 2009

# **We are seeking the Board's approval of the University Budget Plan and tuition and fees for 2009-10.**

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- The proposed budget covers the period from July 1, 2009 to June 30, 2010.
- The proposed tuition and fee rates will apply to the Fall 2009, Spring 2010 and Summer 2010 terms.

# The budget is balanced. Revenue and budgeted uses are expected to total \$90.9 million in 2009-10.

	2008-09 Budget	2009-10 Budget Plan	Change
<b>Sources</b>			
State General Funds*	\$ 24,549,176	\$ 22,061,481	-10.1%
Federal ARRA Funds	-	2,497,643	n/a
Nongeneral Funds			
Student Tuition and Fees	\$ 40,240,396	\$ 42,020,396	4.4%
Sales and Services			
Housing	8,557,000	9,072,000	6.0%
Dining	7,472,000	7,922,000	6.0%
Bookstore	3,150,000	3,225,000	2.4%
Grants and Contracts	1,330,646	1,344,438	1.0%
Other Sources	2,913,363	2,791,794	-4.2%
Total Nongeneral Funds	\$ 63,663,405	\$ 66,375,628	4.3%
<b>Total Sources</b>	\$ 88,212,581	\$ 90,934,752	3.1%
<b>Uses</b>			
Instruction	\$ 28,488,862	\$ 28,588,812	0.4%
Public Service	846,957	851,695	0.6%
Academic Support	7,440,116	7,485,468	0.6%
Student Services	4,927,194	4,942,158	0.3%
Institutional Support	7,188,726	6,948,498	-3.3%
Operation and Maintenance of Plant	5,236,273	6,024,998	15.1%
Scholarships and Fellowships	3,645,361	4,110,642	12.8%
Auxiliary Enterprises	29,368,160	30,911,549	5.3%
Museums & Cultural Services	1,070,932	1,070,932	0.0%
<b>Total Uses</b>	\$ 88,212,581	\$ 90,934,752	3.1%
<b>Budget Balance</b>	\$ -	\$ -	

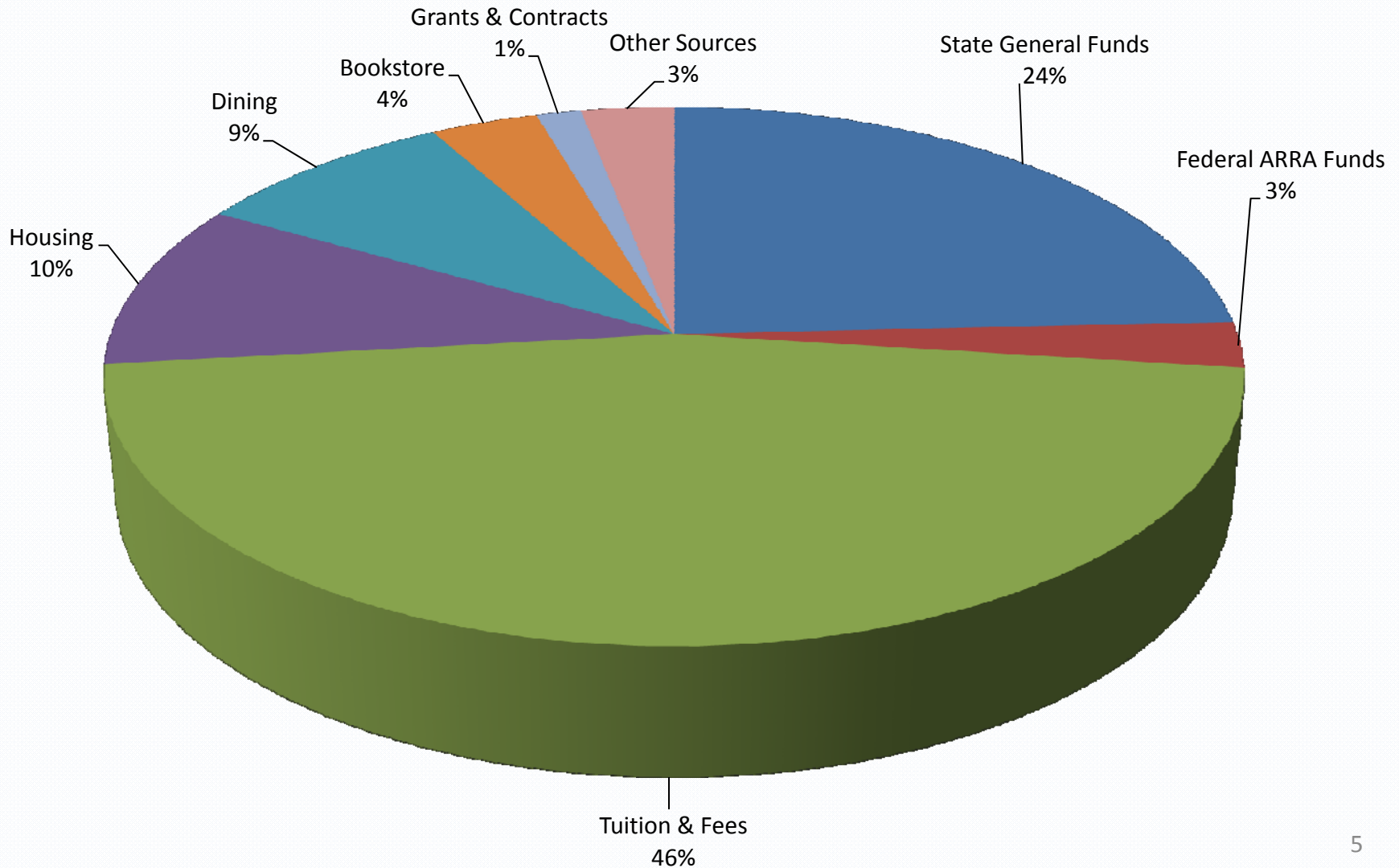
\* Includes both direct appropriations and estimated central transfers for 2009-10.

# Key factors affecting the revenue side of the budget include...

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- State appropriations
  - Continuation of state funding reductions
- American Recovery & Reinvestment ACT (ARRA) funding
- Tuition and fee rates
- Student enrollment

# Less than 25% of UMW's revenue is from state general funds...



# General fund reductions increase in 2009-10. . .

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- Three years of general fund cuts
  - 2007-08: \$1.5 million reduction
  - 2008-09: additional reduction of \$1.6 million
    - Cumulative total of \$3.1 million
  - 2009-10: additional reduction of \$1.9 million
    - Cumulative total of \$5.0 million

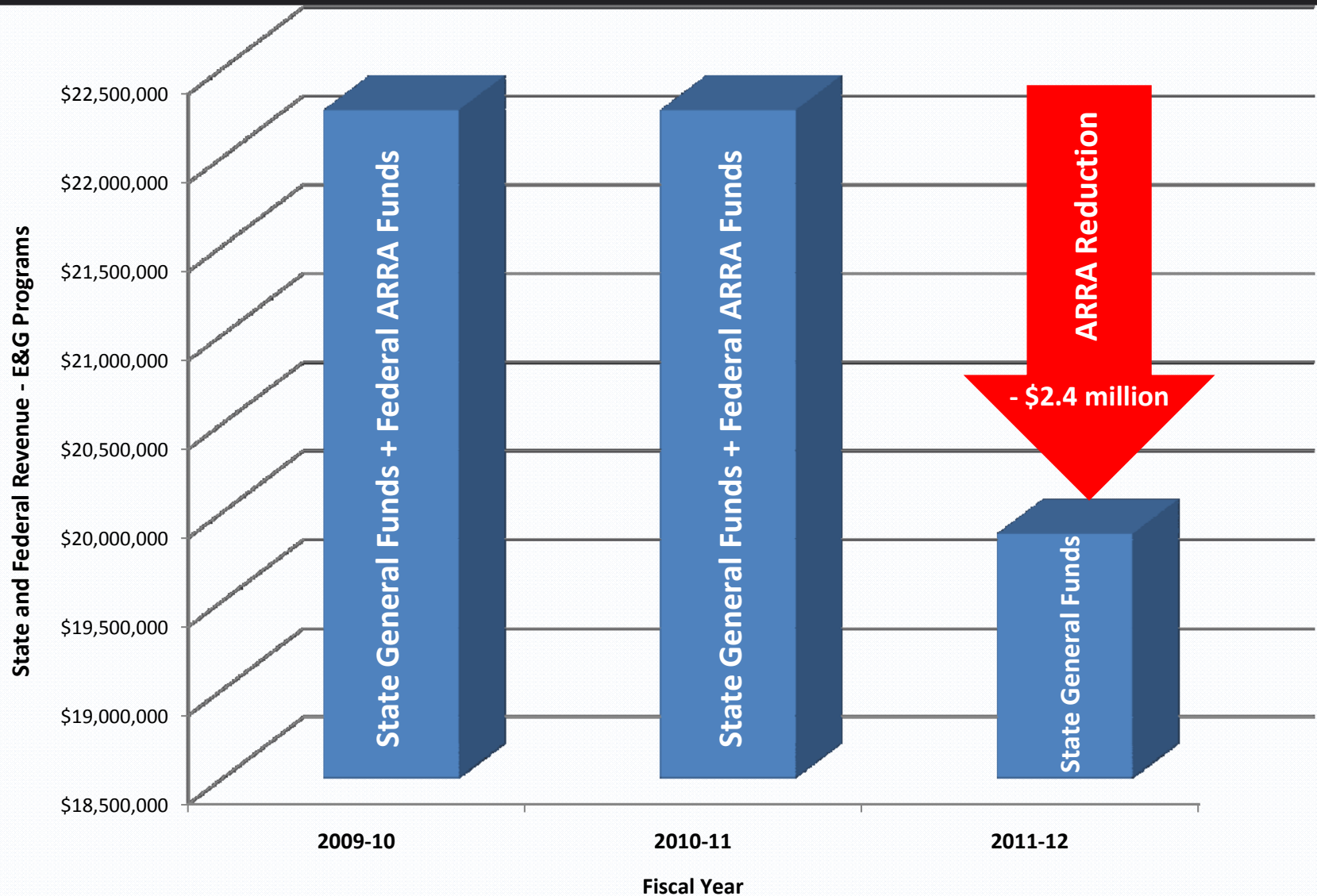
# Temporary offset with federal ARRA funds. . .

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- Total ARRA funding of \$2,497,643
  - \$2,387,643 for general operating expenses in E&G Programs
  - \$110,000 in student financial assistance for Pell Grant increase
- ARRA funds will be allocated for only two years
  - FY 2009-10
  - FY 2010-11
  - No ARRA funds in FY 2011-12



# Loss of federal ARRA funds will create an E&G revenue shortfall in FY 2011-12. . .





# Tuition and Fee revenue. . .

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- No state restrictions on E&G tuition and fee rates
  - Legislative expectation that increases will be 2% - 5%
  - 5% cap on mandatory non-E&G fees remains
    - For UMW – Auxiliary Comp Fee
- Tuition and fee rates assumed in the 2009-10 budget plan
  - 5% increase for in-state students
  - 5% increase for out-of-state students

# University housing and meal plans. . .

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- No state restrictions on housing or meal plan rates
- Housing and dining rates assumed in the 2009-10 budget plan
  - 6% increase for University housing
  - 6% increase for meal plans

# Projected enrollment. . .

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- Total headcount enrollment projected to be consistent with the current year
  - About 5,100 students on both campuses
- Mix of students by residency continues to change
  - Anticipated decline of about 35 FTE in out-of-state students
  - Replaced with additional in-state students
  - Tuition differential results in revenue loss
    - Estimated in the budget plan at about \$335,000

# Turning to the 2009-10 expenditure budget . . .

	2008-09	2009-10	
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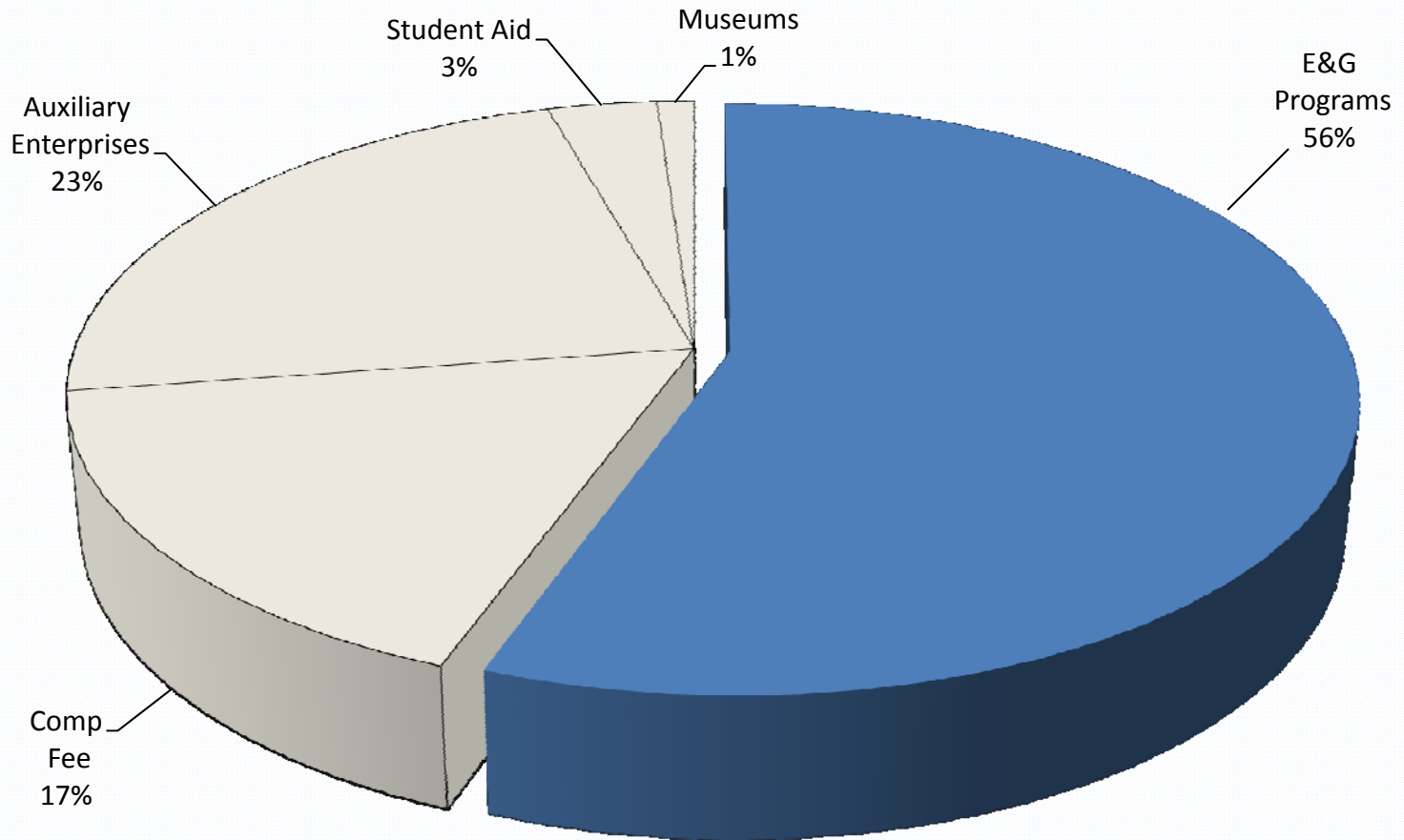
# The operating budget is really comprised of five separate programs . . .

<b>FY 2009-10 Sources</b>	<b>Educational &amp; General Programs</b>	<b>Auxiliary Enterprises</b>	<b>Comp Fee</b>	<b>Student Financial Assistance</b>	<b>Museums &amp; Cultural Services</b>	<b>Total University</b>
<b>State General Fund</b>						
Direct Appropriations	\$ 19,929,170	\$ -	\$ -	\$ 1,468,704	\$ 665,344	\$ 22,063,218
Central Transfers	(56,737)	-	-	55,000	-	(1,737)
<b>Total General Fund</b>	\$ 19,872,433	\$ -	\$ -	\$ 1,523,704	\$ 665,344	\$ 22,061,481
<b>Federal ARRA Funds</b>	\$ 2,387,643	\$ -	\$ -	\$ 110,000	\$ -	\$ 2,497,643
<b>Nongeneral Funds</b>						
Student Tuition and Fees	\$ 27,280,924	\$ -	\$ 14,739,472	\$ -	\$ -	\$ 42,020,396
Grants and Contracts	-	-	-	1,344,438	-	1,344,438
Sales and Services	-	20,219,000	-	-	-	20,219,000
Other Revenues	1,056,371	607,000	780,000	-	348,423	2,791,794
<b>Total Nongeneral Funds</b>	\$ 28,337,295	\$ 20,826,000	\$ 15,519,472	\$ 1,344,438	\$ 348,423	\$ 66,375,628
<b>Total University Sources</b>	\$ 50,597,371	\$ 20,826,000	\$ 15,519,472	\$ 2,978,142	\$ 1,013,767	\$ 90,934,752
<b>FY 2009-10 Uses</b>						
Instruction	\$ 28,375,887	\$ -	\$ 212,925	\$ -	\$ -	\$ 28,588,812
Research and Public Service	539,695	-	312,000	-	-	851,695
Academic Support	6,756,454	-	729,014	-	-	7,485,468
Student Services	3,591,559	-	1,350,599	-	-	4,942,158
Institutional Support	6,108,438	-	840,060	-	-	6,948,498
Operation and Maintenance of Plant	5,225,338	-	799,660	-	-	6,024,998
Scholarships and Fellowships	-	-	1,132,500	2,978,142	-	4,110,642
Auxiliary Enterprises						
University Housing	-	4,508,308	300,000	-	-	4,808,308
Dining Services	-	5,574,616	-	-	-	5,574,616
Bookstore	-	2,973,092	-	-	-	2,973,092
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Subtotal - Auxiliary Enterprises	-	20,826,000	10,085,549	-	-	30,911,549
Museums and Cultural Services						
Belmont	-	-	28,575	-	772,273	800,848
James Monroe Museum & Library	-	-	28,590	-	241,494	270,084
Subtotal - Museums/Cultural Services	-	-	57,165	-	1,013,767	1,070,932
<b>Total University Uses</b>	\$ 50,597,371	\$ 20,826,000	\$ 15,519,472	\$ 2,978,142	\$ 1,013,767	\$ 90,934,752



# More than one-half of the budget is in E&G programs...

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# Educational and General Programs (E&G)

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- Core instructional programs and related support services.
- Primary sources of support come from general fund appropriations, federal ARRA funds and student tuition and fees.
- \$50.6 million budget for 2009-10
  - 1.6% increase over 2008-09 (\$802,000)



# Key features of the proposed 2009-10 E&G budget include...

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- Funding for a permanent Provost position
- Funding for a new VP for Diversity position
- Funding for a new Associate Dean for Enrollment
- Two new police officer positions
- Support for a University Events Office
- Extended Library hours during exams
- Establishment of reserve pool for FY12
  - Used for one-time expenses in FY10 and FY11
  - Offset ARRA reduction in FY12

# **The E&G budget will also address a number of unavoidable cost increases. . .**

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- State funding cut for Eminent Scholars program
- Additional payment to state Treasury for debt costs associated with out-of-state students
- Increase in the federal minimum wage
- Licenses, lease costs, and contracts
- Utility rate increases
- Operating and maintenance costs for new space
  - Lee Hall addition
  - College Avenue house

# How are new funding requirements being addressed?

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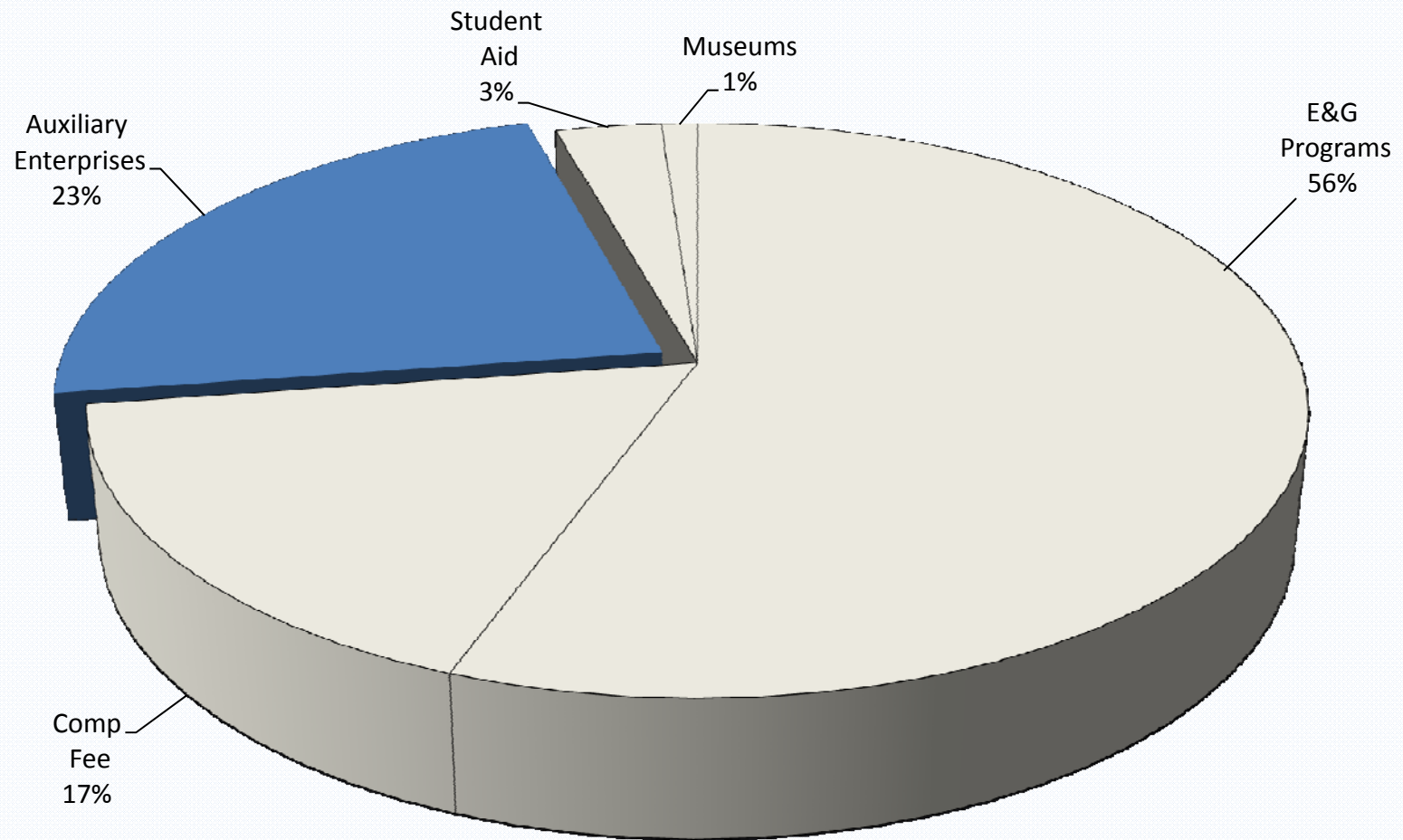
- Continued freeze on vacant positions
  - Excludes teaching faculty and campus police
  - Other exemptions made on a case-by-case basis on recommendation of the Vice President and approval of the President
- Elimination of one-time FY09 budget allocations
- Targeted budget reductions across the University
  - Budget plan assumes cuts of \$640,000
- Tuition and fee increases of 5%

# Auxiliary Enterprises. . .

<b>FY 2009-10 Sources</b>	<b>Educational &amp; General Programs</b>	<b>Auxiliary Enterprises</b>	<b>Comp Fee</b>	<b>Student Financial Assistance</b>	<b>Museums &amp; Cultural Services</b>	<b>Total University</b>
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# The second largest piece of the operating budget is auxiliary enterprises. . .

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# Auxiliary Enterprise Programs

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- Self-supporting services provided to students, faculty and staff
  - Dining, University housing, bookstore, recreation, intercollegiate athletics, student life operations, student activities, UMW Galleries, network and communication services
- Receives no general fund (state taxpayer support)
- \$20.8 million budgeted for 2009-10
  - 5.3% increase over current budget (\$1.0 million)

# Key features of the proposed 2009-10 budget for auxiliary enterprises include...

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- Coverage of full annual cost of private contract for internet, cable TV and communications in the dorms
- Enhanced dining program
  - Flexible meal zones
- Offset revenue loss from de-tripling residence halls
- Unavoidable cost increases
  - Support for the federal minimum wage increase
  - Postal rates

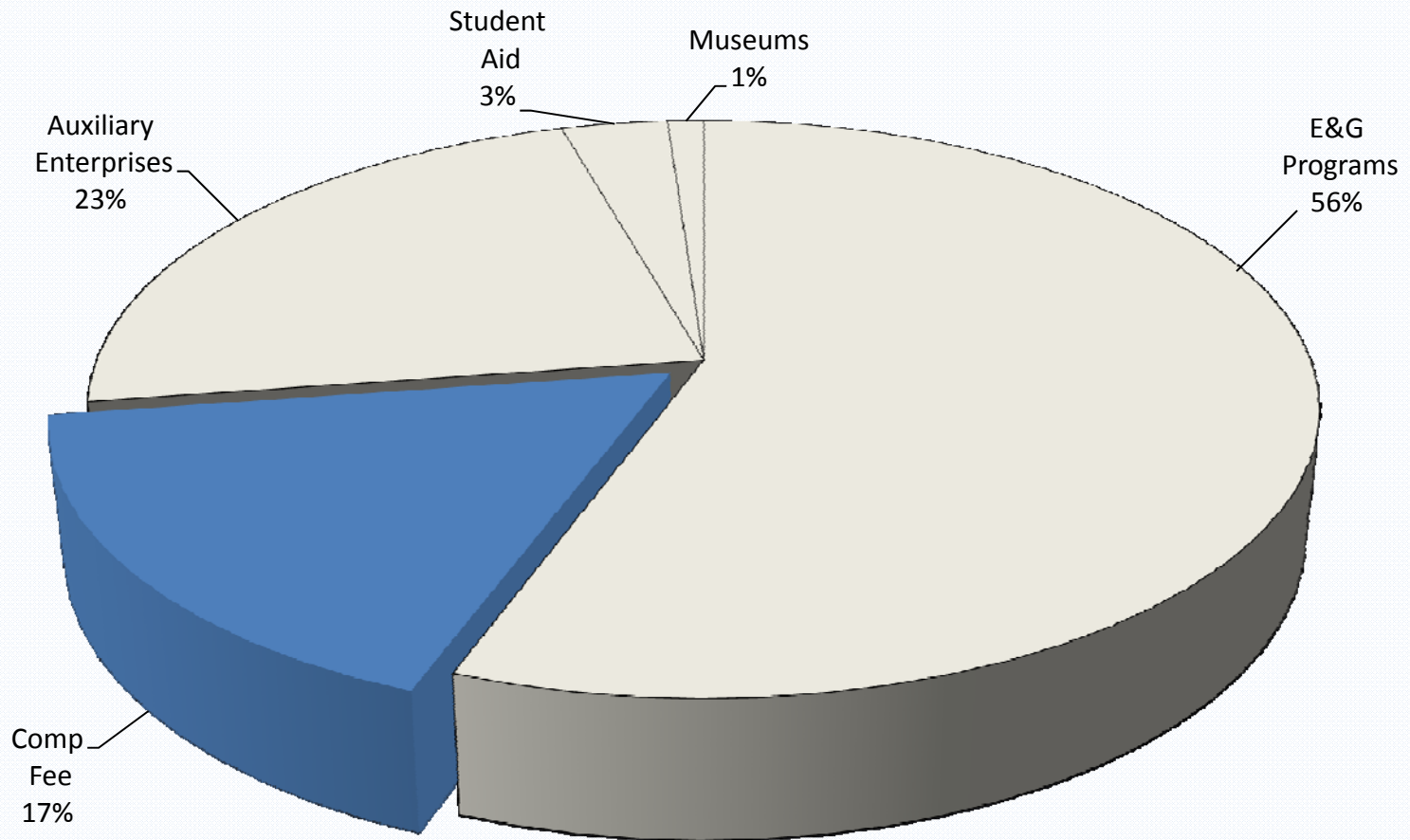


# Comprehensive Fee. . .

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# The third largest piece of the University budget is supported by the Comprehensive Fee...

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# Comprehensive Fee

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- Mandatory fee charged to all students
- Two components of the Comprehensive Fee (proposed FY10 rate of \$3,558)
  - E&G is about 39% or \$1,392 (full-time, academic year)
  - Auxiliary is 61% or \$2,166 (full-time, academic year)
- \$15.5 million budget for 2009-10

# **The Comp Fee budget supports a wide variety of instructional, student, and University programs...**

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- Admissions
- Scholarship for Excellence
- Orientation and Programming
- Student Clubs/Recreation/Athletics
- Faculty development grants
- Undergraduate research program
- Special Events / Commencement
- Facilities – utilities, improvements, debt service
- Information Technology
- News and Information, Development, Alumni Relations

# Key features of the proposed 2009-10 Comp Fee budget include...

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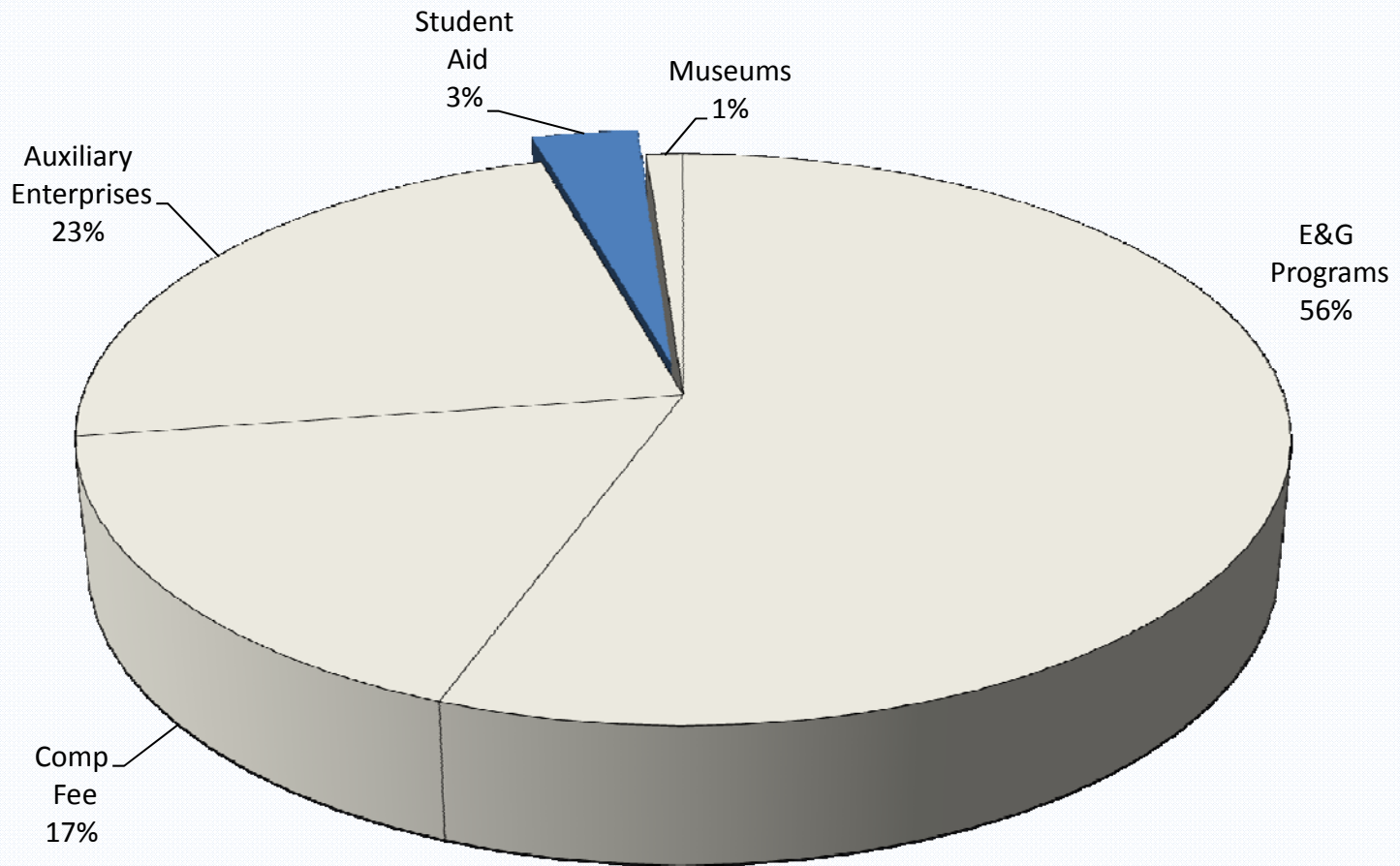
- Funding for Diversity Scholarships
  - First year funding of \$100,000
- Need-based aid for in-state undergraduate students
  - Required for state compliance regarding Tuition Moderation Fund allocations
- Operation of the Underground in Lee Hall
  - Operation and maintenance costs
  - Food service operations
  - New student programming



# Student Financial Assistance. . .

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# About 3% of the budget is for student financial assistance programs...





# Student Financial Assistance

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- Provides support for scholarships and grants awarded to students
- Key programs include:
  - Virginia Student Financial Assistance Program
  - Federal Pell Grant Program
  - Supplemental Educational Opportunity Grants (SEOG)
  - College Scholarship Assistance Program (federal and state)
  - ACG and SMART Grants (federal)
  - Work study and student employment
- \$2.9 million budget for 2009-10
  - Excludes about \$14 million in student loan programs

# Key features of the budget for student financial assistance include...

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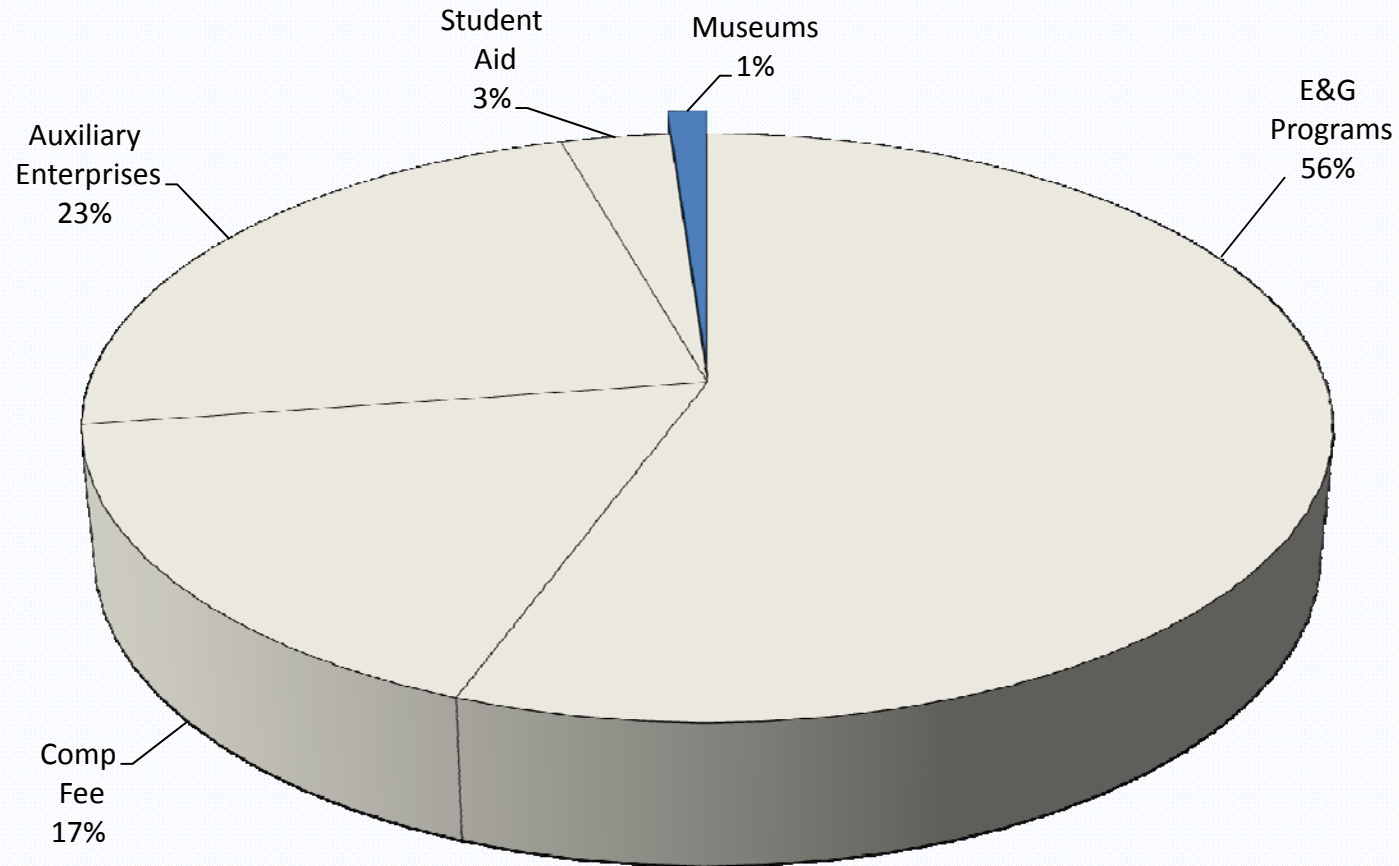
- Increase of \$56,000 in state funding for need-based aid for in-state undergraduate students
  - Total program funding of \$1.5 million
- Increase of \$110,000 in federal ARRA funds for the Pell Grant program
  - Increases maximum award by \$500 to \$4,860
- No net increase in other federal programs

# Museums and Cultural Services. . .

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Sales and Services	-	20,219,000	-	-	-	20,219,000
Other Revenues	1,056,371	607,000	780,000	-	348,423	2,791,794
<b>Total Nongeneral Funds</b>	\$ 28,337,295	\$ 20,826,000	\$ 15,519,472	\$ 1,344,438	\$ 348,423	\$ 66,375,628
<b>Total University Sources</b>	\$ 50,597,371	\$ 20,826,000	\$ 15,519,472	\$ 2,978,142	\$ 1,013,767	\$ 90,934,752
<b>FY 2009-10 Uses</b>						
Instruction	\$ 28,375,887	\$ -	\$ 212,925	\$ -	\$ -	\$ 28,588,812
Research and Public Service	539,695	-	312,000	-	-	851,695
Academic Support	6,756,454	-	729,014	-	-	7,485,468
Student Services	3,591,559	-	1,350,599	-	-	4,942,158
Institutional Support	6,108,438	-	840,060	-	-	6,948,498
Operation and Maintenance of Plant	5,225,338	-	799,660	-	-	6,024,998
Scholarships and Fellowships	-	-	1,132,500	2,978,142	-	4,110,642
Auxiliary Enterprises						
University Housing	-	4,508,308	300,000	-	-	4,808,308
Dining Services	-	5,574,616	-	-	-	5,574,616
Bookstore	-	2,973,092	-	-	-	2,973,092
Other Services	-	7,769,984	9,785,549	-	-	17,555,533
Subtotal - Auxiliary Enterprises	-	20,826,000	10,085,549	-	-	30,911,549
Museums and Cultural Services						
Belmont	-	-	28,575	-	772,273	800,848
James Monroe Museum & Library	-	-	28,590	-	241,494	270,084
Subtotal - Museums/Cultural Services	-	-	57,165	-	1,013,767	1,070,932
<b>Total University Uses</b>	\$ 50,597,371	\$ 20,826,000	\$ 15,519,472	\$ 2,978,142	\$ 1,013,767	\$ 90,934,752

# About 1% of the budget supports Belmont and the James Monroe Museum and Library...

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# Museums and Cultural Services

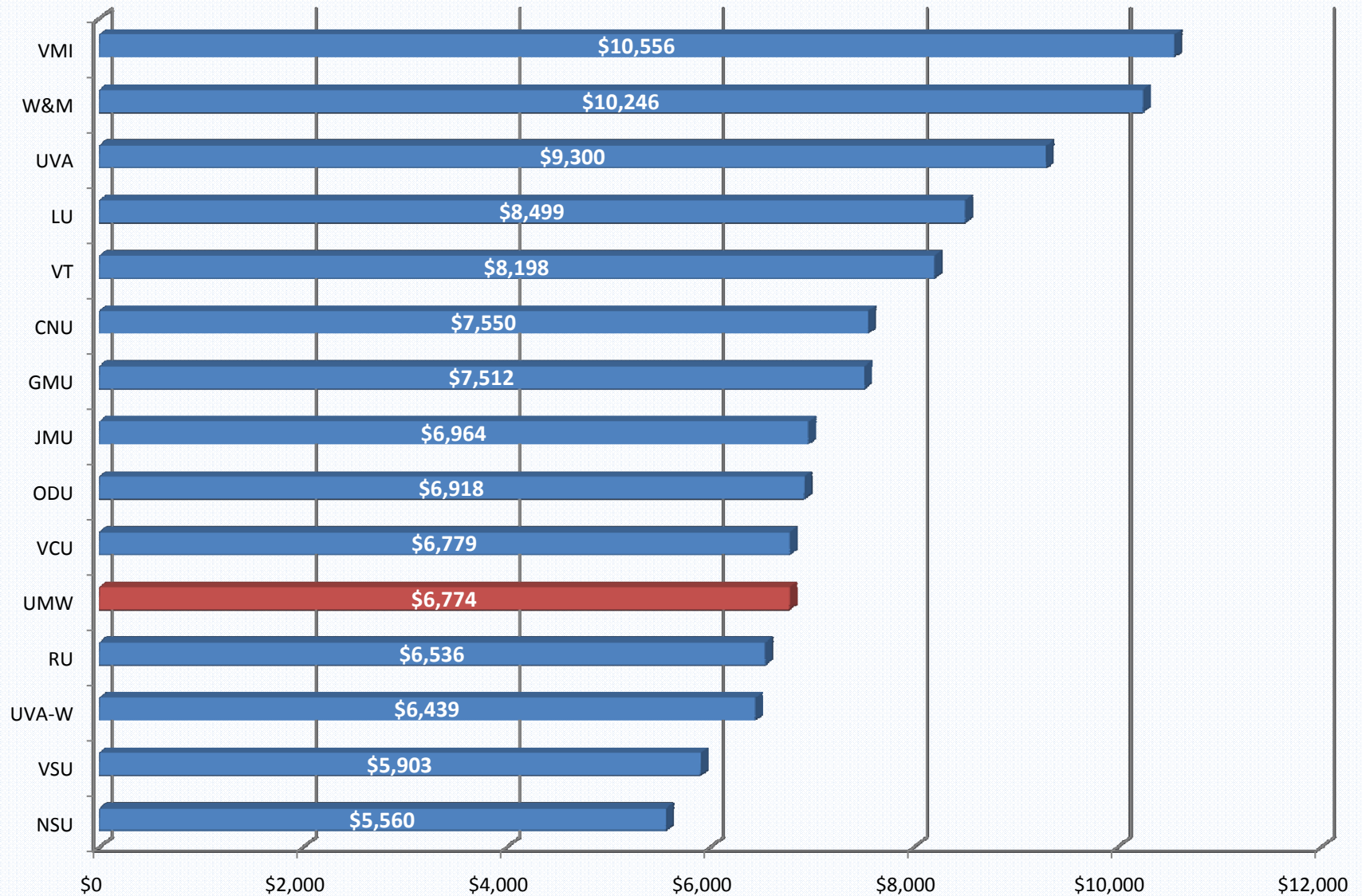
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- Gari Melchers - Belmont
- James Monroe Museum and Law Library
- Revenue sources
  - State general funds
  - Ticket sales
  - Gift shop revenue
  - Facilities rental
  - Private gifts
- No changes are reflected in the 2009-10 budget

# **Proposed 2009-10 Tuition and Fees**

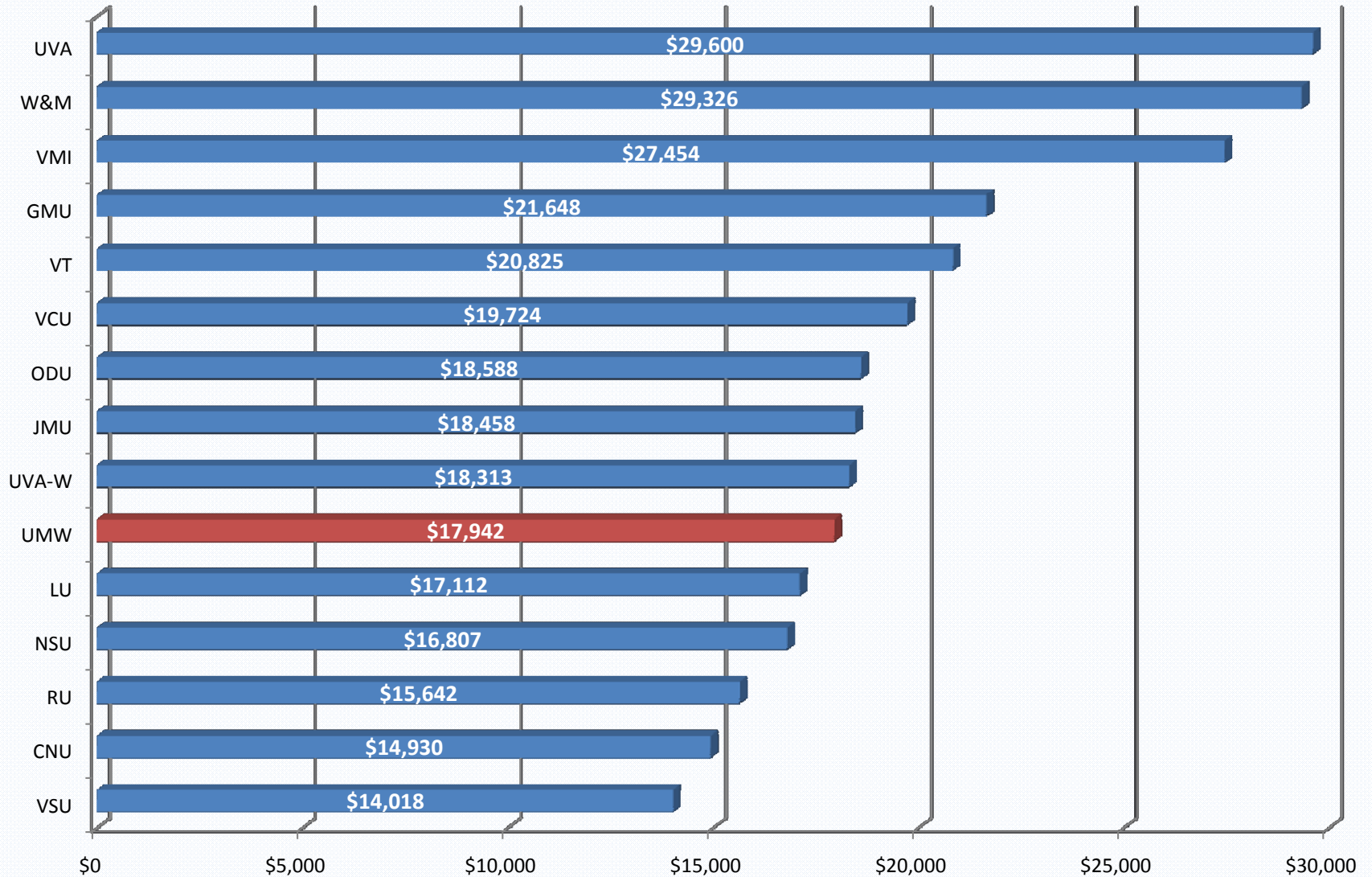


# 2008-09 tuition and fees for in-state commuter students

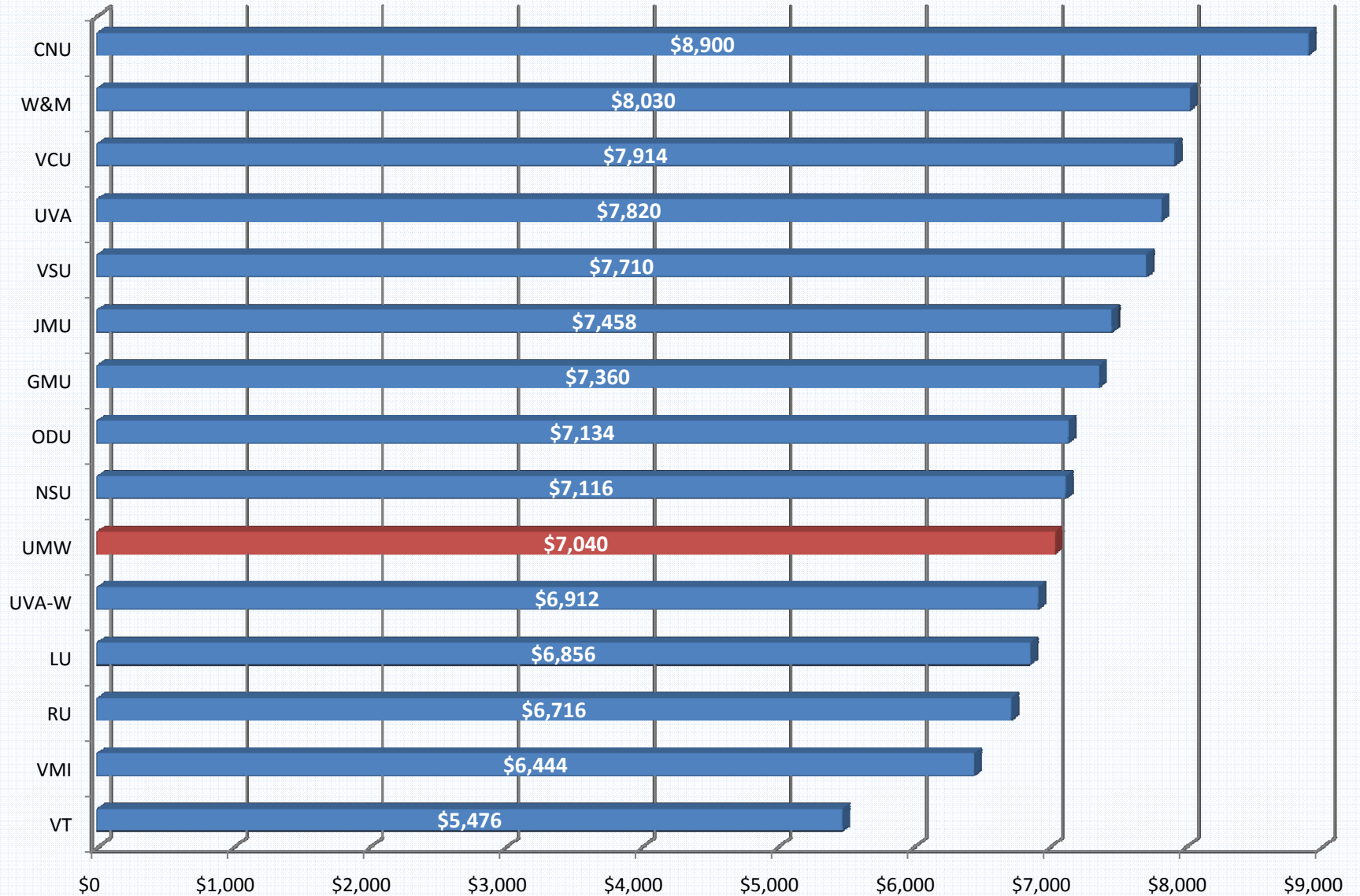




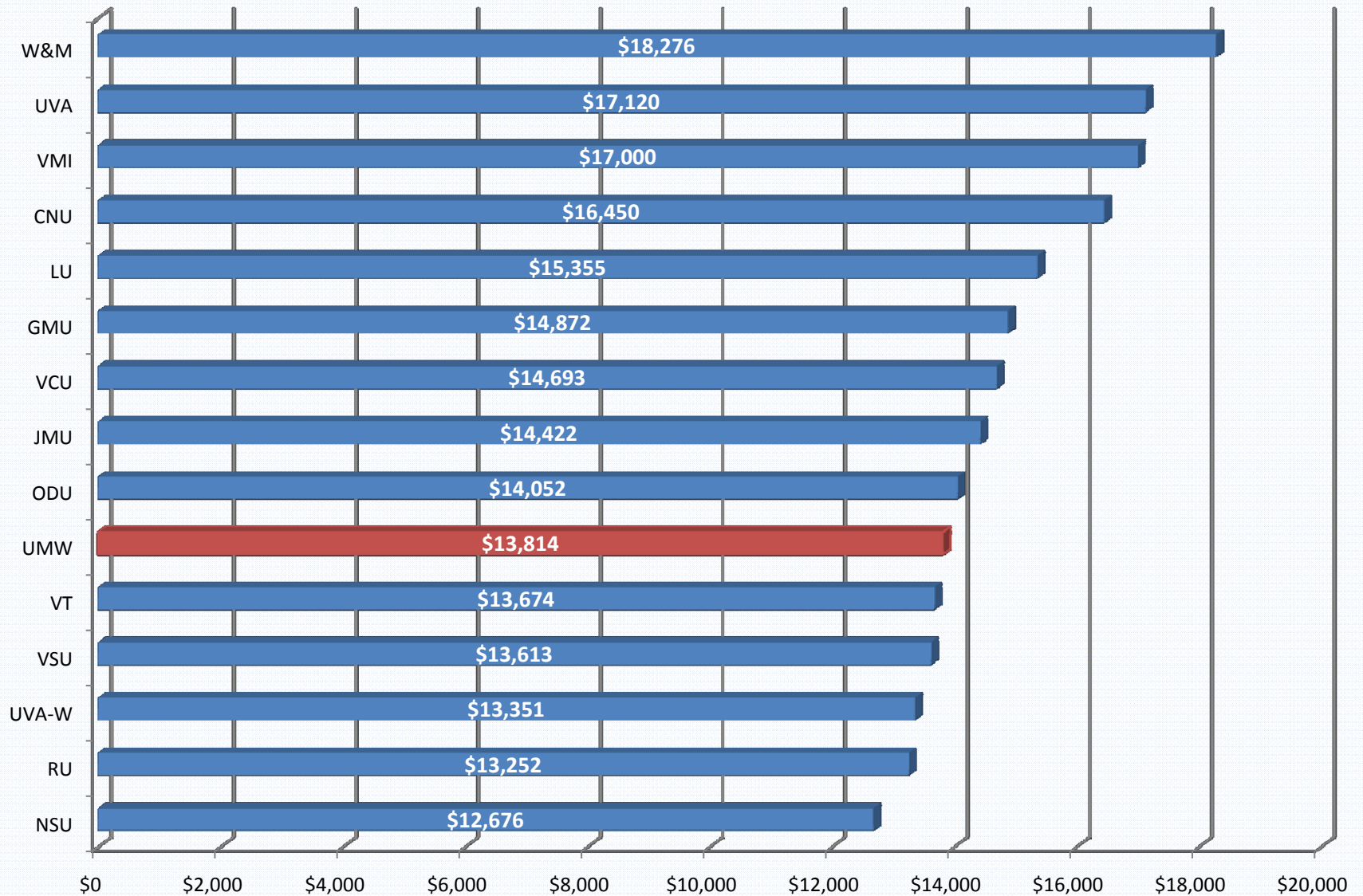
# 2008-09 tuition and fees for out-of-state commuters



# 2008-09 room and board charges

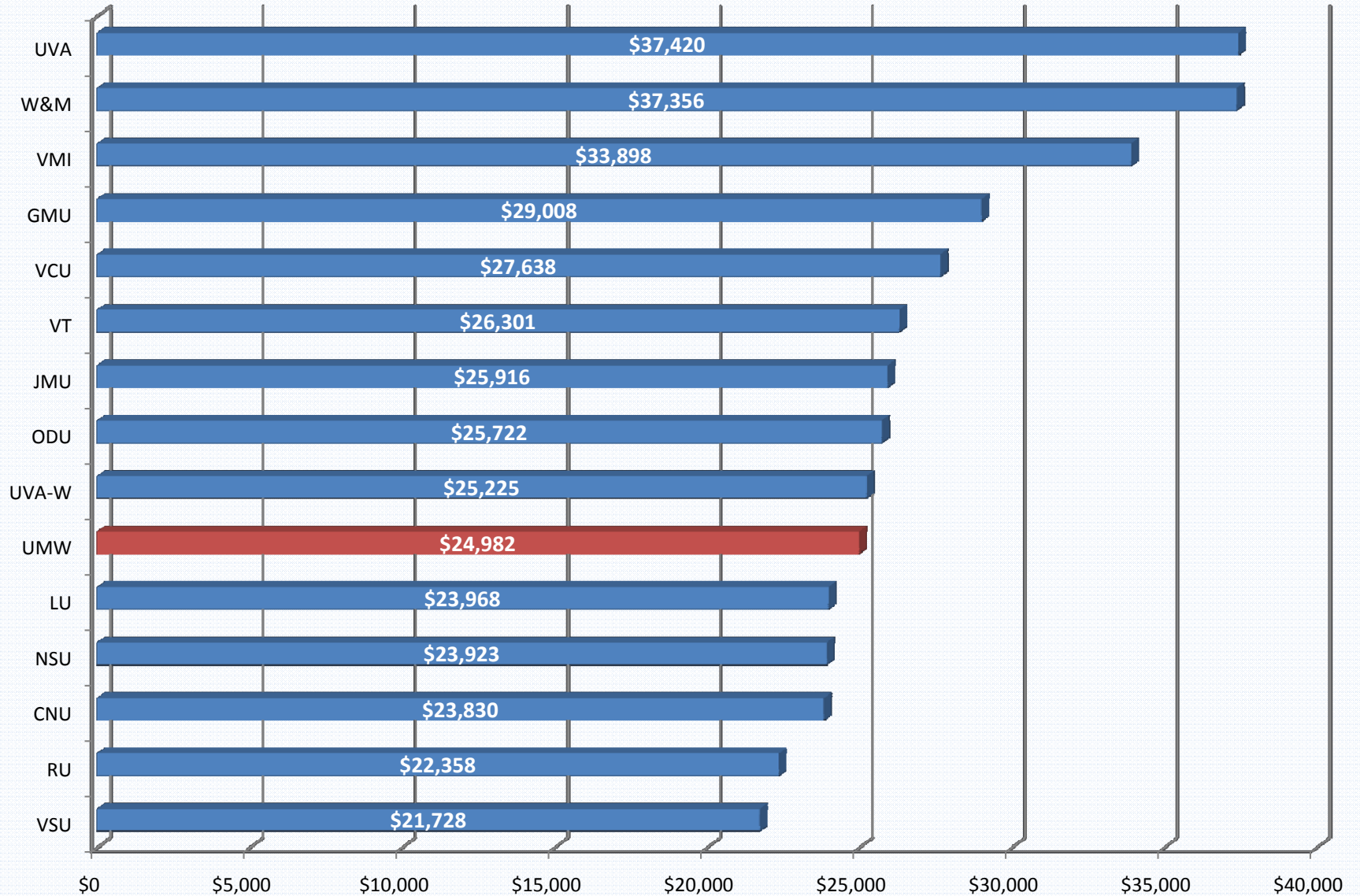


# 2008-09 total charge for in-state residential students





# 2008-09 total for out-of-state residential students



# 2009-10 proposed tuition increases include...

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- In-state tuition: 5% increase
  - \$168 increase for the academic year
- Out-of-state tuition: 5% increase
  - \$728 increase for the academic year
- Graduate student tuition: 5% increase
  - \$7 per credit hour increase for in-state students
  - \$30 per credit hour increase for out-of-state students
- Comprehensive Fee: 5% increase
  - \$170 increase for the academic year

# Other rate changes. . .

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- University housing: 6% increase
  - \$306 increase for single dorm room
  - \$250 increase for double dorm room
- University apartments: 7.5% increase
  - \$416 increases for single room apartment
  - \$342 increase for double room apartment
- University board plans: 6%
  - \$172 increase for the most popular meal plans



# In summary, the 2009-10 recommended tuition and fee rates reflect moderate increases for undergraduates...

<b><i>Residential Students</i></b>	In-State Students			Out-of-State Students		
	2008-09	2009-10	% Chg.	2008-09	2009-10	% Chg.
Tuition	\$3,386	\$3,554	5.0%	14,554	15,282	5.0%
Comprehensive Fee (E&G)	1,325	1,392	5.1%	1,325	1,392	5.1%
Comprehensive Fee (Auxiliary)	2,063	2,166	5.0%	2,063	2,166	5.0%
Housing (1)	4,168	4,418	6.0%	4,168	4,418	6.0%
Board (2)	2,872	3,044	6.0%	2,872	3,044	6.0%
<b>Total</b>	<b>\$13,814</b>	<b>\$14,574</b>	<b>5.5%</b>	<b>\$24,982</b>	<b>\$26,302</b>	<b>5.3%</b>

(1) Based on double-occupancy room.

(2) Based on 15-meal / \$100 flex dollars plan.

<b><i>Commuting Students</i></b>	In-State Students			Out-of-State Students		
	2008-09	2009-10	% Chg.	2008-09	2009-10	% Chg.
Tuition	\$3,386	\$3,554	5.0%	14,554	15,282	5.0%
Comprehensive Fee (E&G)	1,325	1,392	5.1%	1,325	1,392	5.1%
Comprehensive Fee (Auxiliary)	2,063	2,166	5.0%	2,063	2,166	5.0%
<b>Total</b>	<b>\$6,774</b>	<b>\$7,112</b>	<b>5.0%</b>	<b>\$17,942</b>	<b>\$18,840</b>	<b>5.0%</b>

# Overall, UMW's relative position to other Virginia institutions is expected to be consistent with 2008-09...

Rank	IS Tuition		OS Tuition		Required Fees		IS Commuter		OS Commuter		Room & Board		IS Total		OS Total	
1	UVA	\$7,498	UVA	\$27,798	VMI	\$5,294	VMI	\$10,556	UVA	\$29,600	CNU	\$8,900	W&M	\$18,276	UVA	\$37,420
2	VT	\$6,895	W&M	\$25,263	W&M	\$4,063	W&M	\$10,246	W&M	\$29,326	W&M	\$8,030	UVA	\$17,120	W&M	\$37,356
3	W&M	\$6,183	VMI	\$22,160	LU	\$3,990	UVA	\$9,300	VMI	\$27,454	VCU	\$7,914	VMI	\$17,000	VMI	\$33,898
4	GMU	\$5,526	GMU	\$19,662	JMU	\$3,408	LU	\$8,499	GMU	\$21,648	UVA	\$7,820	CNU	\$16,450	GMU	\$29,008
5	VMI	\$5,262	VT	\$19,522	CNU	\$3,344	VT	\$8,198	VT	\$20,825	VSU	\$7,710	LU	\$15,355	VCU	\$27,638
6	VCU	\$4,992	VCU	\$17,937	UVA-W	\$2,850	CNU	\$7,550	VCU	\$19,724	JMU	\$7,458	GMU	\$14,872	VT	\$26,301
7	<b>UMW</b>	<b>\$4,711</b>	<b>UMW</b>	<b>\$15,879</b>	NSU	\$2,779	GMU	\$7,512	ODU	\$18,588	GMU	\$7,360	VCU	\$14,693	JMU	\$25,916
8	LU	\$4,509	ODU	\$15,873	ODU	\$2,715	JMU	\$6,964	JMU	\$18,458	ODU	\$7,134	JMU	\$14,422	ODU	\$25,722
9	CNU	\$4,206	UVA-W	\$15,463	VSU	\$2,590	ODU	\$6,918	UVA-W	\$18,313	NSU	\$7,116	ODU	\$14,052	UVA-W	\$25,225
10	ODU	\$4,203	JMU	\$15,050	RU	\$2,349	VCU	\$6,779	<b>UMW</b>	<b>\$17,942</b>	<b>UMW</b>	<b>\$7,040</b>	<b>UMW</b>	<b>\$13,814</b>	<b>UMW</b>	<b>\$24,982</b>
11	RU	\$4,187	NSU	\$14,028	<b>UMW</b>	<b>\$2,063</b>	<b>UMW</b>	<b>\$6,774</b>	LU	\$17,112	UVA-W	\$6,912	VT	\$13,674	LU	\$23,968
12	UVA-W	\$3,589	RU	\$13,293	GMU	\$1,986	RU	\$6,536	NSU	\$16,807	LU	\$6,856	VSU	\$13,613	NSU	\$23,923
13	JMU	\$3,556	LU	\$13,122	UVA	\$1,802	UVA-W	\$6,439	RU	\$15,642	RU	\$6,716	UVA-W	\$13,351	CNU	\$23,830
14	VSU	\$3,313	CNU	\$11,586	VCU	\$1,787	VSU	\$5,903	CNU	\$14,930	VMI	\$6,444	RU	\$13,252	RU	\$22,358
15	NSU	\$2,781	VSU	\$11,428	VT	\$1,303	NSU	\$5,560	VSU	\$14,018	VT	\$5,476	NSU	\$12,676	VSU	\$21,728

Source: SCHEV 2008-09 Tuition and Fee Report - July 2008.

**UMW Recommended 2009-10 Rates:**

<u><b>\$4,946</b></u>	<u><b>\$16,674</b></u>	<u><b>\$2,166</b></u>	<u><b>\$7,112</b></u>	<u><b>\$18,840</b></u>	<u><b>\$7,462</b></u>	<u><b>\$14,574</b></u>	<u><b>\$26,302</b></u>
IS Tuition	OS Tuition	Required Fees	IS Commuter	OS Commuter	Room & Board	IS Total	OS Total
5.0% inc.	5.0% inc.	5.0% inc.	5.0% inc.	5.0% inc.	6.0% inc.	5.5% inc.	5.3% inc.

**In conclusion, we are asking the Board of Visitors to approve the University Budget Plan and 2009-10 tuition and fee rates as presented in the meeting materials.**