



2010-11
University Budget Plan
and
Tuition and Fees

UMW Board of Visitors
May 7, 2010

**University of Mary Washington
2010-11 University Budget Plan
Tuition and Fees**

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2010-11 University Budget Plan

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2010-11 Tuition and Fees

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TABLE A

**University of Mary Washington
2010-11 University Budget Plan**

| | 2009-10 Revised Budget | 2010-11 Budget Plan | Change Over 2009-10 |
|------------------------------------|------------------------------|-----------------------------|---------------------------|
| Sources | | | |
| State General Funds* | \$ 21,162,239 | \$ 21,393,012 | 1.1% |
| Federal ARRA Funds | 1,579,107 | 3,406,157 | 115.7% |
| Nongeneral Funds | | | |
| Student Tuition and Fees | \$ 43,229,050 | \$ 46,353,515 | 7.2% |
| Sales and Services | | | |
| Housing | 9,122,000 | 8,029,000 | -12.0% |
| Dining | 7,922,000 | 8,796,400 | 11.0% |
| Bookstore | 3,195,000 | 3,000,000 | -6.1% |
| Grants and Contracts | 2,320,000 | 2,405,000 | 3.7% |
| Other Sources | 2,738,086 | 2,638,586 | -3.6% |
| Total Nongeneral Funds | <u>\$ 68,526,136</u> | <u>\$ 71,222,501</u> | 3.9% |
| Total Sources | \$ 91,267,482 | \$ 96,021,670 | 5.2% |
| Uses | | | |
| Instruction | \$ 28,271,306 | \$ 29,621,417 | 4.8% |
| Research and Public Service | 837,409 | 653,449 | -22.0% |
| Academic Support | 8,403,799 | 8,770,929 | 4.4% |
| Student Services | 4,915,688 | 5,239,927 | 6.6% |
| Institutional Support | 6,300,017 | 6,718,040 | 6.6% |
| Operation and Maintenance of Plant | 5,596,167 | 5,974,798 | 6.8% |
| Scholarships and Fellowships | 4,926,204 | 5,376,205 | 9.1% |
| Auxiliary Enterprises | 30,988,383 | 31,366,771 | 1.2% |
| Museums & Cultural Services | 1,028,509 | 1,028,134 | 0.0% |
| Contingencies | | | |
| HEETF | - | 632,000 | n/a |
| Maintenance Reserve | - | 640,000 | n/a |
| Total Uses | <u>\$ 91,267,482</u> | <u>\$ 96,021,670</u> | 5.2% |
| Budget Balance | <u>\$ -</u> | <u>\$ -</u> | |

* Includes both direct appropriations and estimated central transfers.

University of Mary Washington 2010-11 University Budget Plan

Highlights

Overview

- ❑ The 2010-11 budget plan was prepared within a framework defined by actions of the 2010 General Assembly, recommended tuition and fee rates, projected student enrollment, unavoidable cost increases and commitments, and key priorities identified by the President and university leadership. Further, the budget was shaped by a weak state revenue outlook, a struggling national economy and temporary federal stimulus funding provided through the American Recovery and Reinvestment Act (ARRA).
- ❑ Table A on page I-1 summarizes projected university sources and uses for 2010-11.
 - The budget is balanced with projected sources and uses estimated at \$96.0 million.
 - The 2010-11 budget represents a 5.2% increase over the current budget.

2010 General Assembly

- ❑ The university's 2010-11 spending plan incorporates the state budget adopted by the 2010 General Assembly on March 14, 2010. Key actions taken by the General Assembly affecting the university's operating budget include:
 - No permanent salary increases for either faculty or classified staff for the 2010-11 fiscal year. The General Assembly did, however, approve a one-time bonus of 3% for December 2010 if state revenue balances meet specific thresholds at June 30, 2010. The university's 2010-11 tuition and fee rates assume that the bonus is implemented.
 - Changes in fringe benefits including a 3% employer rate increase for health insurance, partial restoration of the deferred compensation match program (with full restoration in 2011-12), and a new employee (hired after July 1, 2010) contribution requirement of 5% for both the VRS and optional retirement plans.
 - An additional general fund appropriation of \$100,000 for initial operating costs of the Dahlgren Education and Research Center. An additional \$150,000 in general funds has been appropriated for 2011-12.
 - An appropriation of \$3,406,157 in federal stimulus funds (American Recovery and Reinvestment Act) in 2010-11 to support Educational and General Programs. This amount represents an increase of \$1.8 million above UMW's 2009-10 ARRA allocation. The ARRA funding, however, expires after the 2010-11 fiscal year.
 - An increase of \$130,535 in the amount the university must pay the Department of Treasury for state debt related costs associated with out-of-state students. This brings UMW's total annual reimbursement expense to \$422,985.
 - A reduction of fifty percent in state support for the Eminent Scholars program. UMW's reduction is estimated at \$24,500 and additional operating budget has been identified to replace the state funds.

- The elimination of auxiliary interest earnings previously retained by the university from cash balances. This action will result in a revenue reduction of about \$75,000 from the 2009-10 fiscal year.
- No additional general fund support for the Commonwealth's undergraduate student financial assistance program. Total general fund support for the program will hold steady at about \$1.5 million in 2010-11.
- Contingency funding for the Higher Education Equipment Trust Fund (HEETF) and maintenance reserve programs tied to a debt capacity study for the Commonwealth. The findings of the debt capacity study will be presented on or before the beginning of the 2011 General Assembly session. In the event funding for these programs is not available, the university's operating budget includes contingency funding in the amount of \$632,000 for equipment (HEETF) and \$640,000 for maintenance reserve projects

Tuition and Fees

- The 2010-11 budget plan is based on the 2010-11 tuition and fee rates presented on pages II-4 through II-6. The following is a summary of the recommended tuition and fee charges for 2010-11:

Full-Time Undergraduates - University Housing*

| | <u>2009-10</u> | <u>2010-11</u> | <u>Change</u> |
|--------------|----------------|----------------|---------------|
| In-State | \$14,674 | \$15,874 | 8.2% |
| Out-of-State | \$26,402 | \$27,602 | 4.5% |

Full-Time Undergraduates - Commuters*

| | <u>2009-10</u> | <u>2010-11</u> | <u>Change</u> |
|--------------|----------------|----------------|---------------|
| In-State | \$7,212 | \$7,862 | 9.0% |
| Out-of-State | \$18,940 | \$19,590 | 3.4% |

** Includes tuition and comprehensive fee. For students living in University Housing, reflects double occupancy and subscription to a meal plan (150 meal block / \$300 flex).*

Enrollment

- The 2010-11 budget plan is based on a total preliminary projected headcount enrollment of 5,541 for Fall 2010, slightly above the Fall 2009 headcount enrollment of 5,380. There is, however, a projected headcount loss of 92 out-of-state students. There is anticipated to be only minimal revenue impact given the overall total increase in Virginia students.

| Headcount | <u>Actual Fall 2009</u> | | | <u>Projected Fall 2010</u> | | |
|------------------|-------------------------|------------|--------------|----------------------------|------------|--------------|
| | <u>I/S</u> | <u>O/S</u> | <u>Total</u> | <u>I/S</u> | <u>O/S</u> | <u>Total</u> |
| Undergraduate | 3,535 | 862 | 4,397 | 3,783 | 936 | 4,719 |
| Graduate | 931 | 52 | 983 | 780 | 42 | 822 |
| Total | 4,466 | 914 | 5,380 | 4,563 | 978 | 5,541 |

Includes Fredericksburg and Stafford campuses

TABLE B
University of Mary Washington
2010-11 University Budget Plan
Sources and Uses Summary

| | Educational & General Programs | | | | Student Financial Assistance | Museums & Cultural Services | Total University | Change from 2009-10 Budget | |
|--------------------------------------|--------------------------------|---------------|-----------------------------|--------------|------------------------------|-----------------------------|------------------|----------------------------|--|
| | Auxiliary Enterprises | Comp Fee | Museums & Cultural Services | Amount | | | | Percent | |
| FY 2010-11 Sources | | | | | | | | | |
| State General Fund | | | | | | | | | |
| Direct Appropriations | \$ 18,987,067 | \$ - | \$ - | \$ 1,468,705 | \$ 664,969 | \$ 21,120,741 | \$ (227,280) | -1.1% | |
| Central Transfers | 217,271 | - | - | 55,000 | - | 272,271 | 458,053 | 246.6% | |
| Total General Fund | \$ 19,204,338 | \$ - | \$ - | \$ 1,523,705 | \$ 664,969 | \$ 21,393,012 | \$ 230,773 | 1.1% | |
| Federal ARRA Funds | \$ 3,406,157 | \$ - | \$ - | \$ - | \$ - | \$ 3,406,157 | \$ 1,827,050 | 115.7% | |
| Nongeneral Funds | | | | | | | | | |
| Student Tuition and Fees | \$ 28,867,515 | \$ - | \$ 17,486,000 | \$ - | \$ - | \$ 46,353,515 | \$ 3,124,465 | 7.2% | |
| Grants and Contracts | - | - | - | 2,405,000 | - | 2,405,000 | 85,000 | 3.7% | |
| Sales and Services | - | 19,825,400 | - | - | - | 19,825,400 | (413,600) | -2.0% | |
| Other Revenues | 1,113,837 | 429,000 | 789,749 | - | 306,000 | 2,638,586 | (99,500) | -3.6% | |
| Total Nongeneral Funds | \$ 29,981,352 | \$ 20,254,400 | \$ 18,275,749 | \$ 2,405,000 | \$ 306,000 | \$ 71,222,501 | \$ 2,696,365 | 3.9% | |
| Total University Sources | \$ 52,591,847 | \$ 20,254,400 | \$ 18,275,749 | \$ 3,928,705 | \$ 970,969 | \$ 96,021,670 | \$ 4,754,188 | 5.2% | |
| FY 2010-11 Uses | | | | | | | | | |
| Instruction | \$ 29,057,883 | \$ - | \$ 563,534 | \$ - | \$ - | \$ 29,621,417 | \$ 1,350,111 | 4.8% | |
| Research and Public Service | 366,375 | - | 287,074 | - | - | 653,449 | (183,960) | -22.0% | |
| Academic Support | 7,691,765 | - | 1,079,164 | - | - | 8,770,929 | 367,130 | 4.4% | |
| Student Services | 3,917,967 | - | 1,321,960 | - | - | 5,239,927 | 324,239 | 6.6% | |
| Institutional Support | 5,520,580 | - | 1,197,460 | - | - | 6,718,040 | 418,023 | 6.6% | |
| Operation and Maintenance of Plant | 4,765,277 | - | 1,209,521 | - | - | 5,974,798 | 378,631 | 6.8% | |
| Scholarships and Fellowships | - | - | 1,447,500 | 3,928,705 | - | 5,376,205 | 450,001 | 9.1% | |
| Auxiliary Enterprises | | | | | | | | | |
| University Housing | - | 2,902,969 | 903,000 | - | - | 3,805,969 | 611,433 | 19.1% | |
| Dining Services | - | 6,394,962 | 466,094 | - | - | 6,861,056 | 836,946 | 13.9% | |
| Bookstore | - | 2,908,684 | - | - | - | 2,908,684 | (39,700) | -1.3% | |
| Other Services | - | 8,047,785 | 9,743,277 | - | - | 17,791,062 | (1,030,291) | -5.5% | |
| Subtotal - Auxiliary Enterprises | - | 20,254,400 | 11,112,371 | - | - | 31,366,771 | 378,388 | 1.2% | |
| Museums and Cultural Services | | | | | | | | | |
| Belmont | - | - | 28,575 | - | 729,570 | 758,145 | (280) | 0.0% | |
| James Monroe Museum & Library | - | - | 28,590 | - | 241,399 | 269,989 | (95) | 0.0% | |
| Subtotal - Museums/Cultural Services | - | - | 57,165 | - | 970,969 | 1,028,134 | (375) | 0.0% | |
| Contingencies | | | | | | | | | |
| HEETF | 632,000 | - | - | - | - | 632,000 | 632,000 | n/a | |
| Maintenance Reserve | 640,000 | - | - | - | - | 640,000 | 640,000 | n/a | |
| Total University Uses | \$ 52,591,847 | \$ 20,254,400 | \$ 18,275,749 | \$ 3,928,705 | \$ 970,969 | \$ 96,021,670 | \$ 4,754,188 | 5.2% | |

2009-10 Budget Plan by Fund Source and Key Priorities

- ❑ **Revenues and Expenditures:** Table B on page I-4 presents the 2010-11 revenue and expenditure budget by major fund source and program classification. Budgeted revenue is derived from three sources – state general fund appropriations (taxpayer support), temporary allocations under the American Recovery and Reinvestment Act (ARRA) and a variety of nongeneral fund revenues.

State general fund appropriations come from state tax revenue appropriated by the General Assembly. General fund appropriations are used to support Educational and General (E&G) Programs, Museums and Cultural Services (Belmont and James Monroe Museum and Library) and Student Financial Assistance.

ARRA funds represent federal allocations made through the Virginia General Assembly as a temporary offset to reductions in state general funds. These funds will not be available after the 2010-11 fiscal year.

Nongeneral funds describe revenues raised by UMW from student tuition and fees and a variety of other sources, including sales and services, grants and contracts (federal student aid programs), application fees, library fines, course audit fees, facilities and equipment rental and other miscellaneous charges.

- ❑ The UMW operating budget is structured around five fund groups: Educational and General (E&G) Programs, Auxiliary Enterprises, Comprehensive Fee, Student Financial Assistance, and Museums and Cultural Services. Each of these fund groups is outlined briefly below along with a summary of key budget changes for 2010-11.

- **Educational and General (E&G) Programs:** The E&G Programs budget includes the university's instructional programs and related support services. Revenue is derived mainly from state general fund appropriations and student tuition and fee revenue. For 2010-11, additional operating revenue is provided with federal stimulus (ARRA) funds.

Key new priorities funded in the 2010-11 budget include the following:

- Contingency funding for a 3% faculty and staff bonus for December 2010
- Personal services costs for a new Dean in the College of Arts & Sciences
- Personal services costs for a new Dean of Education (through reallocations)
- Continued development of the new Colleges of Education and Business
- The establishment of a new Division of Professional Development and Regional Engagement
- Initial operating support for the Dahlgren Education and Research Center
- An increase of \$100,000 in base operating support for the Library
- Extended Library hours during exams

- Funding to support a permanent director of student counseling services
- Replacement funding for the reduction in state funding for Eminent Scholars
- The establishment of a self-study director for SACs accreditation
- Additional capital outlay expense reimbursement for out-of-state students
- Increased costs for utilities, licenses, leases, and contracts
- Set aside funding of \$632,000 for equipment in the event state debt financing for the HEETF program is not forthcoming
- Set aside funding of \$640,000 for critical maintenance reserve needs in the event state debt financed support for this program is not forthcoming

One of the key aspects of the 2010-11 operating budget is the inclusion of \$3.4 million in federal ARRA funds. These stop-gap funds will not be available after 2010-11, which, along with an anticipated additional reduction in general fund support of \$2.3 million, will mean a significant revenue loss in 2011-12. The university's multi-year budget planning efforts, however, address this anticipated revenue shortfall through the reallocation of one-time expenses reflected in the 2010-11 budget (3% faculty and staff bonus, software upgrades, set aside pools for HEETF and maintenance reserve), and additional tuition and fee rate adjustments in 2011-12.

- **Auxiliary Enterprises:** Activities funded under the auxiliary enterprise program exist to serve students, faculty or staff and are funded through the sale of goods or services or mandatory fees. Auxiliary enterprises include residential facilities, dining services, student recreation programs and facilities, student centers, intercollegiate athletics, and student health services. Auxiliary enterprise activities do not receive any state support, either for operating costs or for the maintenance or construction of facilities. In addition, auxiliary enterprises reimburse E&G programs for indirect costs, such as institutional management, human resources, and financial services.

Key new priorities funded in the 2010-11 budget include the following:

- Contingency funding for a 3% bonus for faculty and staff
- Funding to support an employer cost increase of 3% for health insurance
- Upgrading the dining program to an all block plan approach in response to student requests
- Addressing the revenue loss associated with the temporary closing of Mason and Randolph Halls for renovation
- Incorporating the addition of new student housing options at Eagle Landing
- Addressing declines in Bookstore sales due to increased competition with on-line book sellers
- The elimination of the health services fee for commuter students

- **Comprehensive Fee:** The Comprehensive Fee budget supports a wide variety of instructional, student, and university programs, including scholarships, orientation and programming, student clubs, facilities, recreation, news and information, admissions, and special events.

Key new priorities funded in the 2010-11 Comprehensive Fee budget include the following:

- o The addition of \$215,000 in funding for Presidential Diversity Scholarships. This represents the second of four years of planned funding increases for this program.
- o New funding of \$150,000 for need-based aid for in-state undergraduate students

- **Student Financial Assistance:** The student financial assistance budget is comprised of state and federal financial aid programs for students.

Key priorities reflected in the 2010-11 budget include the following:

- o No funding changes for the state supported need-based aid program for in-state undergraduate students. General fund support for this program will continue at \$1,468,704 in 2010-11.
- o An increase in the federal Pell Grant program of 4% or about \$85,000. The additional funding will increase the maximum Pell Grant by \$200 to \$5,550 in 2010-11. Future increases in the Pell Grant program are indexed to the CPI plus 1%.

Other federal financial aid programs, including Supplemental Educational Opportunity Grants (SEOG), federal Work-Study, Academic Competitiveness Grants (ACG) and SMART grants are expected to be level funded.

Beginning in 2010-11, the university will be administering the federal direct lending program for students. These federal pass-through funds will be recorded in the university's financial statements and are estimated to be about \$8 million annually. These pass-through funds are not reflected in the 2010-11 budget plan.

- **Museums and Cultural Services:** The museums and cultural services program includes the operating budgets for Belmont and the James Monroe Museum and Library (JMML). These operations are supported with state general funds and from revenues generated through ticket sales, gift shop revenue, facilities rental and private gifts.

No funding changes are reflected in the 2010-11 budget for Belmont or JMML.

University of Mary Washington 2010-11 Tuition and Fees

Summary

Tuition and fee charges recommended for the 2010-11 academic year are summarized below for selected student groups:

Full-Time Undergraduates - University Housing

| | 2009-10 | 2010-11 | Change | |
|--------------|----------|----------|---------|------|
| | | | Amount | % |
| In-State | \$14,674 | \$15,874 | \$1,200 | 8.2% |
| Out-of-State | \$26,402 | \$27,602 | \$1,200 | 4.5% |

Full-Time Undergraduates - Commuters

| | 2009-10 | 2010-11 | Change | |
|--------------|----------|----------|--------|------|
| | | | Amount | % |
| In-State | \$7,212 | \$7,862 | \$650 | 9.0% |
| Out-of-State | \$18,940 | \$19,590 | \$650 | 3.4% |

Part-Time Graduate Students - Per Credit Hour

| | 2009-10 | 2010-11 | Change | |
|--------------|---------|---------|--------|------|
| | | | Amount | % |
| In-State | \$332 | \$362 | \$30 | 9.0% |
| Out-of-State | \$749 | \$772 | \$23 | 3.1% |

The rates above include tuition and mandatory fees for a typical student. For students living in University Housing, the estimated charges reflect double occupancy and subscription to the 150 block / \$300 flex dollars board plan.

Detailed tuition and fee schedules are presented on pages II-4 to II-6.

Key Considerations in 2010-11 Tuition and Fee Rate Setting

- 1. State Budget Reductions:** State general fund support to UMW has declined \$5.7 million since 2007-08. Actions of the 2010 General Assembly include an additional reduction in 2011-12 of \$2.3 million, bringing the total cut in state support to \$8.0 million or about 34.5% of UMW's original 2007-08 general fund appropriation for E&G programs.

Although a portion of the state funding cut will be offset by federal (ARRA) stimulus funding, these federal funds provide only temporary relief and by 2011-12 the university must fully address the permanent state reduction without any federal funding offset. One of the key considerations in setting

the 2010-11 rates has been UMW's longer term financial outlook and avoiding double-digit increases in a given year.

2. **Cost Increases:** The university's preliminary operating budget estimates include a number of mandatory cost increases. Projected operating cost increases in 2010-11 include:
 - a) **3% bonus for faculty and staff:** The General Assembly approved a 3% bonus for faculty and staff for December 2010. Of the total estimated cost of \$1,310,000, state funds will support an estimated \$595,000. The unfunded balance of \$715,000 must be covered using other university sources.
 - b) **3% employer rate increase for health insurance:** The employer cost of health insurance is expected to increase by 3% in 2010-11. Of the total estimated cost of \$150,000, state funds are expected to cover \$55,000. The unfunded balance of \$95,000 must be supported with university funds.
 - c) **Capital outlay fee for out-of-state students:** The 2010 General Assembly increased the capital outlay fee by \$5 per credit hour beginning in 2010-11. This mandatory rate change will result in an increased expense of \$131,000 that the university must remit to the state each year.
 - d) **State funding reduction for Eminent Scholars:** State funding for the Eminent Scholars program has been reduced by 50% in 2010-11 or about \$24,500 at UMW. This reduction, which directly affects budget supporting selected faculty salaries, must be replaced using other university resources.
 - e) **Interest earnings on auxiliary cash balances:** State budget actions now take all interest earnings the university previously generated from its auxiliary cash balances. This revenue stream was included in the university's operating budget and must now be replaced with other fee revenue.
 - f) **Unavoidable cost increases:** In the normal course of operations, the university must support unavoidable cost increases for utilities, contracts, licenses, insurance, and leases. UMW receives no state support for these costs, which are estimated at \$325,000 in 2010-11.
3. **University priorities:** A number of key priorities have been included in the 2010-11 budget plan for which the university receives no state funding support. These include:
 - a) **Need-based student aid for Virginia undergraduates:** The budget plan includes \$150,000 in new funding for need-based aid to ensure access and minimize the impact of planned rate increases on students and families with financial need.
 - b) **Diversity Scholarship Program:** In 2009-10, UMW initiated a scholarship program to increase student diversity with funding of \$215,000. This program will grow over four years with new funding of \$215,000 for each new class until a full complement is reached in 2012-13 at a total cost of \$860,000.
 - c) **Library support:** The university has committed to increasing the base operating support of the library by \$100,000 in 2010-11.

- d) **Key reorganizations:** The 2010-11 operating budget includes initial implementation of the new Colleges of Business and Education, the establishment of the Division of Professional Development and Regional Engagement, preliminary operating support for the Dahlgren Education and Research Center and funding for a new Dean of the College of Arts and Sciences. Support for these changes will come from new funding of about \$300,000 and internal budget reallocations.
 - e) **Dining program enhancements:** In response to student requests, dining plans have been restructured to a block plan approach with expanded flex dollars. The restructured plans will provide students with a greater degree of flexibility in the use of their meal plans. The 2010-11 meal plan rates reflect these changes.
 - f) **Student housing improvements:** With the opening of Eagle Landing for fall 2010 and the closing of Randolph and Mason Halls for extensive renovations, UMW has embarked on a program to significantly enhance campus housing offerings to its students. The 2010-11 housing rates reflect these changes and incorporate additional funds needed to support the debt-financed housing renovations.
4. **Contingencies:** The 2010 General Assembly set funding for the Higher Education Equipment Trust Fund (HEETF) and maintenance reserve programs contingent upon the findings of a study on the Commonwealth's debt capacity. This study is to be completed on or before the start of the 2011 legislative session. These programs are a critical part of the university's instructional equipment and facilities maintenance budgets. As such, the 2010-11 budget includes one-time replacement funding for these program totaling \$1.2 million in the event that state support is not forthcoming. To the extent that state funding is provided, these funds can be redirected to other university priorities.
5. **Market considerations:** Current data on 2009-10 tuition and fees indicate that UMW's pricing is very competitive with other public institutions in Virginia. Of the 15 public universities in Virginia, UMW's total in-state tuition and fee charges for commuter students and in-state residential students are both ranked 10th (#1 being the highest charges; #15 the lowest).

Similarly, UMW's 2009-10 tuition and fee charges for out-of-state students also are ranked 10th out of the 15 Virginia institutions.

Assuming that increases at other institutions are generally consistent with those at UMW, it is anticipated that UMW's overall ranking in tuition and fees will reflect only minor changes in its 2010-11 rankings compared to 2009-10.

A comparison of 2009-10 tuition and fee charges among Virginia's public four-year institutions is presented on page II-7.

The detailed tuition and fee schedules for 2010-11 are presented on pages II-4, II-5 and II-6.

**University of Mary Washington
2010-11 Tuition and Fees**

| | In-State Students | | | Out-of-State Students | | |
|---|-------------------|-----------------|--------|-----------------------|-----------------|--------|
| | 2009-10* | 2010-11 | % Chg. | 2009-10* | 2010-11 | % Chg. |
| <i>Full-Time Undergraduates Living in Private Housing</i> | | | | | | |
| Tuition | \$3,654 | \$3,984 | 9.0% | \$15,382 | \$15,712 | 2.1% |
| Comprehensive Fee (E&G) | 1,392 | 1,516 | 8.9% | 1,392 | 1,516 | 8.9% |
| Comprehensive Fee (Auxiliary) | 2,166 | 2,362 | 9.0% | 2,166 | 2,362 | 9.0% |
| Total | <u>\$7,212</u> | <u>\$7,862</u> | 9.0% | <u>\$18,940</u> | <u>\$19,590</u> | 3.4% |
| <i>Full-Time Undergraduates Living in University Housing</i> | | | | | | |
| Tuition | \$3,654 | \$3,984 | 9.0% | \$15,382 | \$15,712 | 2.1% |
| Comprehensive Fee (E&G) | 1,392 | 1,516 | 8.9% | 1,392 | 1,516 | 8.9% |
| Comprehensive Fee (Auxiliary) | 2,166 | 2,362 | 9.0% | 2,166 | 2,362 | 9.0% |
| Housing (1) | 4,418 | 4,816 | 9.0% | 4,418 | 4,816 | 9.0% |
| Board (2) | 3,044 | 3,196 | 5.0% | 3,044 | 3,196 | 5.0% |
| Total | <u>\$14,674</u> | <u>\$15,874</u> | 8.2% | <u>\$26,402</u> | <u>\$27,602</u> | 4.5% |
| <i>(1) Based on double-occupancy room.</i> | | | | | | |
| <i>(2) Based on 150 block / \$300 flex dollars plan.</i> | | | | | | |
| <i>Part-Time Undergraduates (Per credit hour rates)</i> | | | | | | |
| Tuition | \$156 | \$170 | 9.0% | \$644 | \$658 | 2.2% |
| Comprehensive Fee (E&G) | 39 | 42 | 7.7% | 39 | 42 | 7.7% |
| Comprehensive Fee (Auxiliary) | 62 | 68 | 9.7% | 62 | 68 | 9.7% |
| Total | <u>\$257</u> | <u>\$280</u> | 8.9% | <u>\$745</u> | <u>\$768</u> | 3.1% |
| <i>Part-Time Graduates (Per credit hour rates)</i> | | | | | | |
| Tuition | \$231 | \$252 | 9.1% | \$648 | \$662 | 2.2% |
| Comprehensive Fee (E&G) | 39 | 42 | 7.7% | 39 | 42 | 7.7% |
| Comprehensive Fee (Auxiliary) | 62 | 68 | 9.7% | 62 | 68 | 9.7% |
| Total | <u>\$332</u> | <u>\$362</u> | 9.0% | <u>\$749</u> | <u>\$772</u> | 3.1% |

* Note: The 2009-10 tuition rates include a mid-year increase of \$100 effective with the spring 2010 semester.

**University of Mary Washington
2010-11 Tuition and Fees**

| | In-State Students | | | Out-of-State Students | | |
|---|-----------------------------|---------|--------|---|---------|--------|
| | 2009-10* | 2010-11 | % Chg. | 2009-10* | 2010-11 | % Chg. |
| University Housing* | | | | | | |
| Single Room Rate | \$5,422 | \$5,910 | 9.0% | \$5,422 | \$5,910 | 9.0% |
| Double Room Rate | \$4,418 | \$4,816 | 9.0% | \$4,418 | \$4,816 | 9.0% |
| Triple Room Rate | \$4,206 | \$4,584 | 9.0% | \$4,206 | \$4,584 | 9.0% |
| Quad Room Rate | \$3,990 | \$4,348 | 9.0% | \$3,990 | \$4,348 | 9.0% |
| University Apartments* | | | | | | |
| Single Room Apartment Rate | \$5,952 | \$6,488 | 9.0% | \$5,952 | \$6,488 | 9.0% |
| Double Room Apartment Rate | \$4,898 | \$5,340 | 9.0% | \$4,898 | \$5,340 | 9.0% |
| Triple Room Apartment Rate | \$4,420 | \$4,818 | 9.0% | \$4,420 | \$4,818 | 9.0% |
| Eagle Landing** | | | | | | |
| 9-Month Double Room Rate | n/a | \$5,950 | n/a | n/a | \$5,950 | n/a |
| 12-Month Double Room Rate | n/a | \$6,950 | n/a | n/a | \$6,950 | n/a |
| University Meal Plans* | | | | | | |
| Super Meal Plan (\$100 flex per semester) | n/a | \$4,712 | n/a | n/a | \$4,712 | n/a |
| 275 Meal Block Plan (\$200 flex per semester) | n/a | \$4,576 | n/a | n/a | \$4,576 | n/a |
| 225 Meal Block Plan (\$200 flex per semester) | n/a | \$3,300 | n/a | n/a | \$3,300 | n/a |
| 150 Meal Block Plan (\$300 flex per semester) | n/a | \$3,196 | n/a | n/a | \$3,196 | n/a |
| 90 Meal Block Plan (\$175 flex per semester) | \$1,696 | \$1,780 | 5.0% | \$1,696 | \$1,780 | 5.0% |
| 5 Meal Block Plan (\$75 flex per semester) | n/a | \$1,164 | n/a | n/a | \$1,164 | n/a |
| Summer Housing Rates* | | | | | | |
| | Summer 2010 | | | Summer 2011 | | |
| University Apartments | <u>Session / Week / Day</u> | | | <u>Session / Week / Day</u> <u>Inc.</u> | | |
| Single | \$943 / 194 / 28 | | | \$1,028 / 211 / 31 9.0% | | |
| Double | \$776 / 157 / 24 | | | \$846 / 171 / 26 9.0% | | |
| Triple | \$699 / 141 / 22 | | | \$762 / 154 / 24 9.0% | | |
| University Housing | | | | | | |
| Single | \$817 / 165 / 24 | | | \$891 / 180 / 26 9.0% | | |
| Double | \$624 / 125 / 18 | | | \$680 / 136 / 20 9.0% | | |

*The Board of Visitors approved the 2010-11 rates for housing and meal plans at its meeting on February 19, 2010.

**The Board of Visitors ratified revised rates for Eagle Landing at its meeting on April 9, 2010.

**University of Mary Washington
2010-11 Tuition and Fees**

| | In-State Students | | | Out-of-State Students | | |
|--|-------------------|-----------------------------------|---------|-----------------------|---------|---------|
| | 2009-10* | 2010-11 | % Chg. | 2009-10* | 2010-11 | % Chg. |
| <i>Other Undergraduate/Graduate Fees and Charges</i> | | | | | | |
| Undergraduate overload fee <i>(per credit hour over 18 semester hrs.)</i> | \$156 | \$170 | 9.0% | \$644 | \$658 | 2.2% |
| Undergraduate surcharge <i>(per credit hour charge for all credits above 152 for BA/BS students and above 150 credits for BLS and BPS students)</i> | \$187 | \$187 | 0.0% | \$0 | \$0 | n/a |
| Application Fee | \$50 | \$50 | 0.0% | \$50 | \$50 | 0.0% |
| Processing Fee | \$30 | \$30 | 0.0% | \$30 | \$30 | 0.0% |
| Orientation Fee | \$150 | \$150 | 0.0% | \$150 | \$150 | 0.0% |
| Late Payment Fee | | 10% of unpaid balance up to \$250 | | | | |
| Returned Check Fee | \$45 | \$50 | 11.1% | \$45 | \$50 | 11.1% |
| Study Abroad Processing Fee | \$300 | \$300 | 0.0% | \$300 | \$300 | 0.0% |
| BLS/BPS Portfolio Evaluation Fee | \$100 | \$100 | 0.0% | \$100 | \$100 | 0.0% |
| Course Audit Fee (per credit hour) | \$30 | \$30 | 0.0% | \$30 | \$30 | 0.0% |
| Special Exam Fee (per credit hour) | \$15 | \$15 | 0.0% | \$15 | \$15 | 0.0% |
| Health Center Fee - per semester <i>(for commuting students)</i> | \$170 | \$0 | -100.0% | \$170 | \$0 | -100.0% |
| Music - Private lessons (per course) | \$65 | \$65 | 0.0% | \$65 | \$65 | 0.0% |
| Equestrian Fee (per semester) | | | | | | |
| Beginner students <i>(FY11 estimate)</i> | \$745 | \$757 | 1.6% | \$745 | \$757 | 1.6% |
| Intermediate & advanced students <i>(FY11 est.)</i> | \$795 | \$808 | 1.6% | \$795 | \$808 | 1.6% |
| Parking Decal (on-campus, academic year) | \$200 | \$200 | 0.0% | \$200 | \$200 | 0.0% |
| Eagle Landing Parking Deck and Decal | n/a | \$550 | n/a | n/a | \$550 | n/a |

**The Board of Visitors approved the 2010-11 rates for housing and meal plans at its meeting on February 19, 2010.*

***The Board of Visitors ratified revised rates for Eagle Landing at its meeting on April 9, 2010.*

Undergraduate Cost Comparisons

In-State and Out-of-State Tuition, Required Fees, and Room and Board Charges
Virginia State Supported Four-Year Institutions
2009-10*

| Rank | IS Commuter:** | | OS Commuter:** | | Room & Board | | IS Total | | OS Total | |
|------|----------------|----------------|----------------|-----------------|--------------|----------------|------------|-----------------|------------|-----------------|
| | | | | | | | | | | |
| 1 | VMI | \$11,190 | UVA | \$31,672 | CNU | \$9,040 | W&M | \$19,602 | UVA | \$39,962 |
| 2 | W&M | \$11,100 | W&M | \$31,264 | W&M | \$8,502 | VMI | \$17,982 | W&M | \$39,766 |
| 3 | UVA | \$9,672 | VMI | \$28,738 | VCU | \$8,335 | UVA | \$17,962 | VMI | \$35,530 |
| 4 | LU | \$9,030 | GMU | \$24,008 | UVA | \$8,290 | CNU | \$17,290 | GMU | \$31,708 |
| 5 | VT | \$8,605 | VT | \$21,878 | VSU | \$8,050 | LU | \$16,626 | VCU | \$29,084 |
| 6 | CNU | \$8,250 | VCU | \$20,749 | UVA-W | \$7,770 | GMU | \$15,724 | VT | \$27,702 |
| 7 | GMU | \$8,024 | ODU | \$19,768 | GMU | \$7,700 | VCU | \$15,452 | ODU | \$27,294 |
| 8 | ODU | \$7,318 | JMU | \$19,376 | JMU | \$7,690 | JMU | \$14,934 | JMU | \$27,066 |
| 9 | JMU | \$7,244 | UVA-W | \$19,276 | LU | \$7,596 | ODU | \$14,844 | UVA-W | \$27,046 |
| 10 | UMW | \$7,212 | UMW | \$18,940 | ODU | \$7,526 | UMW | \$14,674 | UMW | \$26,402 |
| 11 | VCU | \$7,117 | LU | \$18,330 | UMW | \$7,462 | UVA-W | \$14,518 | LU | \$25,926 |
| 12 | RU | \$6,904 | NSU | \$17,931 | NSU | \$7,329 | VT | \$14,429 | NSU | \$25,260 |
| 13 | UVA-W | \$6,748 | RU | \$16,568 | RU | \$6,970 | VSU | \$14,224 | CNU | \$25,232 |
| 14 | VSU | \$6,174 | CNU | \$16,192 | VMI | \$6,792 | RU | \$13,874 | RU | \$23,538 |
| 15 | NSU | \$5,872 | VSU | \$14,508 | VT | \$5,824 | NSU | \$13,201 | VSU | \$22,558 |

*Includes Spring 2010 mid-year tuition increases at W&M, UMW, LU, and CNU.

**Includes tuition and mandatory fees.

Sources: 2009-10 Tuition and Fees at Virginia's State-Supported Colleges and Universities, SCHEV, July 2009
SCHEV staff tuition and fee workpapers for mid-year increases

University of Mary Washington 2010-11 University Budget Plan

Glossary of Budget Terms

I. Revenue

Budgeted revenue is derived from either state appropriated tax funds, limited allocations under the Federal American Recovery and Reinvestment Act or nongeneral funds generated by UMW.

General Funds (GF): General funds are state tax dollars. State tax dollars support Educational and General Programs, Museums and Cultural Services (Belmont and James Monroe Museum and Library) and state Student Financial Assistance Programs.

Federal ARRA Funds: Federal funds received by UMW under the American Recovery and Reinvestment Act (ARRA).

Nongeneral Funds (NGF): Nongeneral funds are typically those raised exclusively by UMW to support its budgeted expenditures, the exception being grants and contracts. Nongeneral funds are derived from the following sources:

Tuition: A fixed rate charged each student based on the student's instructional program and residency status.

Comprehensive Fee: A fixed rate charged each student in excess of tuition supporting a wide variety of student, academic support and institutional programming.

Grants and Contracts: Reimbursement of expenditures from federal and state sources, primarily related to student financial assistance.

Sales and Services: Revenue from charges made by a specific organizational unit for the delivery of goods and services.

Housing: A fee charged to students who reside in university Housing. Revenue generated through housing owned by the UMW Foundation (University Apartments and Eagle Landing) is not included in the university's budget.

Board: A fee charged to students who subscribe to a university meal plan.

Other Fees: A variety of fees separately charged for services, fines, cost of materials or supplies, application processing, and facility and equipment rental.

II. Expenditures

Expenditures are budgeted on a program basis. The program expenditure classifications used in the budget are nationally recognized by colleges and universities. They allow for

comparative reporting and are used for analytical purposes. These expenditure classifications are:

Instruction: Expenditures of the Colleges of Arts and Sciences, Business, Education and the Division of Professional Development and Regional Engagement. Expenditures for departmental research and public service that are not separately budgeted are included. Expenditures for both credit and non-credit activities are included, as are general academic instruction, summer session instruction, off-campus instruction, and non-credit community education conducted by the teaching faculty.

Public Service: All funds budgeted specifically for public service and expended for activities established primarily to provide non-instructional services beneficial to groups external to the institution.

Academic Support: This category includes expenditures for the support services that are an integral part of the institution's primary mission of instruction and public service. Included are expenditures for libraries, dean's offices, course and curriculum development, and academic technology support.

Student Services: Funds expended for admissions, registrar activities, financial aid administration, and activities whose primary purpose is to contribute to students' emotional and physical well-being and to their intellectual, cultural, and social development outside the context of the formal instructional program.

Institutional Support: Expenditures for the day-to-day operational support of the institution, excluding expenditures for physical plant operations. Included are general administrative services, executive direction and planning, fiscal operations, and public relations/development.

Operation and Maintenance of Plant: Expenditures for operations established to provide service and maintenance related to the campus grounds and facilities.

Scholarships and Fellowships: Expenditures made in the form of outright grants, and tuition and fee remissions to students enrolled in formal coursework, either for credit or non-credit.

Auxiliary Enterprises: Self-supporting activities established to furnish goods and services to students, faculty and staff.

Museum and Cultural Services: Expenditures related to the operation of Belmont and the James Monroe Museum and Library.

III. Tuition and Fees

Tuition: A fixed rate charged each student based on the student's enrollment load, instructional program and residency status (Virginia resident or nonresident status).

Comprehensive Fee: A fixed rate charged each student in excess of tuition based on the student's enrollment load regardless of residency status. The Comprehensive Fee supports a wide variety of student, academic support and institutional programming.

Residential Fee: A per semester charge for on-campus housing and for UMW Foundation owned housing (e.g., University Apartments and Eagle Landing) based on room occupancy levels (single, double, triple, quad).

Meal Plans: A fee charged for subscription to a university meal plan. All residential students, whether living in University or Foundation owned housing, are required to enroll in a meal plan. Freshmen living in university Housing must subscribe to either the Super Meal Plan, the 275 Meal Block Plan or the 225 Meal Block Plan. All other students living in university Housing may choose any meal plan except the 90 Meal Block or 5 Meal Plans.

All students living in either the University Apartments or Eagle Landing must subscribe to a meal plan. All meal plans are available to these students except the 5 Meal Block Plan.

Meal plans are also available to commuter students and students residing in the University Apartments. All meal plans come with flex dollars, which may be used to purchase additional meals or to eat in the Eagle's Nest or Underground.

Mandatory Processing Fee: A non-refundable fee charged to every student that registers for classes.

Audit Fee: A fee charged to part-time students for auditing a course for no credit on a space available basis.

Tuition Overload Fee: A per credit hour fee charged to full-time undergraduate students registered for more than 18 semester credit hours.

Orientation Fee: A mandatory one-time fee charged to new students to cover the cost of student orientation programming.

Credit-by-Examination: A fee charged to degree-seeking students taking an examination for which degree credit may be awarded.

Private Music Lesson Fee: A fee charged to students taking private music lessons through the university.

Special Course Fees: A supplemental fee charged in addition to tuition for specialized instruction, such as equestrian fees or private music lessons.

Study Abroad Fee: A supplemental fee charged to students studying abroad.

BLS Life/Work Portfolio: BLS (Bachelor of Liberal Studies) candidates pay a special fee for the review of a life/work portfolio. The BLS program is designed to meet the needs of adult students who have some college experience and want to complete a bachelor's degree in the liberal arts or sciences.

Late Payment Fee: A fee equivalent to 10% of unpaid account balances up to \$250 charged to those students whose accounts are not paid in full by the published deadline. Interest may also be charged on all past due accounts.

Returned Check Fee: A service fee charged for each check returned for insufficient funds or similar reasons. Checks returned for insufficient funds will be considered as nonpayment and subject to the 10% late payment fee.

Virginia Resident (in-state student): In general, an independent student, or the parents or legal guardians of a dependent student, legally domiciled in the Commonwealth of Virginia for one full and continuous year immediately before the first official day of class within the semester or term of the student's program and who has paid Virginia state income tax on a full-time salary for that full year. Certain exceptions are made for military personnel.

Parking Fee: A mandatory fee for student vehicle registration and parking decals.