



2013-14  
University Budget Plan  
and  
Tuition and Fees

UMW Board of Visitors  
May 10, 2013

**University of Mary Washington  
2013-14 University Budget Plan  
Tuition and Fees**

**Table of Contents**

**2013-14 University Budget Plan**

Total Sources and Uses	I- 1
2013 General Assembly Actions	I- 2
Summary of 2013-14 Tuition and Fee Rates	I- 3
Projected Student Enrollment	I- 3
Sources and Uses by Fund	I- 4
2013-14 Budget by Fund Source and Key Priorities	I- 5

**2013-14 Tuition and Fees**

Overview of 2013-14 Tuition and Fee Rates	II-1
Key Considerations in 2013-14 Rate Setting	II-1
Tuition Rates by Student Classification and Residency	II-5
University Housing Rates	II-6
Meal Plan Rates	II-7
Other Fees and Charges	II-8
2012-13 Comparison to Other Virginia Institutions	II-9

**Glossary of Terms**

Revenue and Expenditure Budget	III-1
Tuition and Fees	III-2

**TABLE A**

**University of Mary Washington  
2013-14 University Budget Plan**

	2012-13 Revised Budget	2013-14 Budget Plan	Change Over 2012-13
<b>Sources</b>			
State General Funds*			
Educational and General Programs	\$ 19,914,125	\$ 20,771,298	4.3%
Student Financial Assistance	1,780,020	1,884,885	5.9%
Belmont / James Monroe Museum	664,969	674,969	1.5%
Dahlgren Campus	1,900,000	1,750,000	-7.9%
Nongeneral Funds			
Student Tuition and Fees	\$ 52,354,000	\$ 54,188,650	3.5%
Sales and Services			
Housing	9,943,500	10,338,500	4.0%
Dining	9,115,000	9,390,000	3.0%
Bookstore	2,955,000	2,335,000	-21.0%
Grants and Contracts	2,859,625	3,011,125	5.3%
Other Sources	2,702,392	3,171,892	17.4%
Total Nongeneral Funds	<u>\$ 79,929,517</u>	<u>\$ 82,435,167</u>	3.1%
<b>Total Sources</b>	<u>\$ 104,188,631</u>	<u>\$ 107,516,319</u>	3.2%
<b>Uses</b>			
Instruction	\$ 28,971,127	\$ 29,644,217	2.3%
Research and Public Service	1,073,151	1,123,635	4.7%
Academic Support	9,299,989	9,519,476	2.4%
Student Services	5,689,879	6,690,651	17.6%
Institutional Support	4,505,201	4,598,919	2.1%
Operation and Maintenance of Plant	6,524,210	6,887,982	5.6%
Scholarships and Fellowships	6,752,645	6,983,510	3.4%
Auxiliary Enterprises	38,293,073	38,928,573	1.7%
Museums & Cultural Services	1,079,356	1,089,356	0.9%
Higher Education Centers	2,000,000	2,050,000	2.5%
<b>Total Uses</b>	<u>\$ 104,188,631</u>	<u>\$ 107,516,319</u>	3.2%
<b>Budget Balance</b>	<u>\$ -</u>	<u>\$ -</u>	

\* Includes both direct appropriations and estimated central transfers.

# University of Mary Washington 2013-14 University Budget Plan

## Highlights

### Overview

- ❑ The 2013-14 budget plan was prepared within a framework defined by actions of the 2013 General Assembly, Board approved tuition and fee rates, projected student enrollment, unavoidable cost increases and commitments, and key priorities identified by the President and university leadership.
- ❑ Table A on page I-1 summarizes projected university sources and uses for 2013-14.
  - The budget is balanced with projected sources and uses estimated at \$107.5 million.
  - The 2013-14 budget represents a 3.2% increase over the current budget.

### 2013 General Assembly

- ❑ The university's 2013-14 spending plan incorporates the state budget adopted by the 2013 General Assembly on February 23, 2013 and amended on April 3, 2013. Key actions taken by the General Assembly affecting the university's operating budget include:
  - An increase in general funds for base operating support in Educational and General (E&G) programs of \$189,997.
  - Elimination of a general fund turnover and vacancy savings requirement, which totaled \$97,851 in the 2012-13 budget. These funds will be available to the university to address other priorities and general operating cost increases in 2013-14.
  - An increase in the university's reallocation requirement from \$270,930 in 2012-13 to \$361,240 in 2013-14. The reallocated funds are intended to address initiatives in the university's six-year plan and/or address programs and strategies that serve to advance the objectives of the Higher Education Act of 2011.
  - Authorization for a 3% salary increase for eligible teaching and administrative faculty effective July 25, 2013. The cost of the salary increase will be supported from both state general funds, which have been appropriated to the university, and tuition and fee revenue.
  - Authorization for a 2% salary increase for eligible classified staff effective July 25, 2013. In addition, classified staff with five or more years of state service will be eligible for a permanent salary increase equal to \$65 for each year of service, up to a maximum of thirty years. Teaching and administrative faculty are not eligible for this adjustment, which is intended to address salary compression issues. The cost of these salary adjustments will be supported from both state general funds and tuition and fee revenue.
  - Mandatory 18% increase in the university's cost of health insurance premiums for its employees. The health insurance premium increase, estimated at \$896,000, will be supported by both general funds and tuition and fee revenue.

- A reduction of \$46,134 in the university's annual payment to the Department of Treasury for state capital outlay costs associated with out-of-state students. For 2013-14, UMW's payment will total \$293,535.
- A \$150,000 decrease in general fund support for the Dahlgren Campus.
- An increase of \$98,666 in general funds for need-based aid for undergraduate students through the state's financial assistance program. For 2013-14, general fund support for this program will total \$1.8 million. In addition, general fund support of \$6,199 will be provided for graduate fellowships, which is the first time that state funding for student aid has been provided to graduate students at UMW.
- A general fund increase of \$10,000 for operating costs at the James Monroe Museum.

**Tuition and Fees**

- The 2013-14 budget plan is based on the tuition and fee rates approved by the Board of Visitors at meetings on November 17, 2012, and April 19, 2013, and as presented on pages II-5 through II-8. The following is a summary of the tuition and fee charges for 2013-14:

***Full-Time Undergraduates - University Housing\****

	<u>2012-13</u>	<u>2013-14</u>	<u>Change</u>
In-State	\$18,086	\$18,782	3.8%
Out-of-State	\$30,400	\$31,652	4.1%

***Full-Time Undergraduates - Commuters\****

	<u>2012-13</u>	<u>2013-14</u>	<u>Change</u>
In-State	\$9,246	\$9,660	4.5%
Out-of-State	\$21,560	\$22,530	4.5%

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

**Enrollment**

- The 2013-14 budget plan assumes a steady total headcount enrollment of 5,093 for Fall 2013. However, out-of-state enrollment is projected to decline by 25 students and replaced by 25 additional in-state students. The associated revenue impact is reflected in the 2013-14 budget plan.

<b>Headcount</b>	<u>Actual Fall 2012</u>			<u>Projected Fall 2013</u>		
	I/S	O/S	Total	I/S	O/S	Total
Undergraduate	3,935	577	4,512	3,961	555	4,516
Graduate	561	20	581	560	17	577
<b>Total</b>	<b>4,496</b>	<b>597</b>	<b>5,093</b>	<b>4,521</b>	<b>572</b>	<b>5,093</b>

*Includes Fredericksburg and Stafford campuses*

**TABLE B**  
**University of Mary Washington**  
**2013-14 University Budget Plan**  
**Sources and Uses Summary**

FY 2013-14 Sources	Educational & General Programs	Auxiliary Enterprises	Comp Fee	Student Financial Assistance	Museums & Cultural Services	Higher Education Centers	Total University	Change from 2012-13 Budget		
								Amount	Percent	
<b>State General Fund</b>										
Direct Appropriations	\$ 19,800,128	\$ -	\$ -	\$ 1,827,885	\$ 674,969	\$ 1,750,000	\$ 24,052,982	\$ 569,218	2.4%	
Central Transfers	971,170	-	-	57,000	-	-	1,028,170	252,820	32.6%	
<b>Total General Fund</b>	<b>\$ 20,771,298</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 1,884,885</b>	<b>\$ 674,969</b>	<b>\$ 1,750,000</b>	<b>\$ 25,081,152</b>	<b>\$ 822,038</b>	<b>3.4%</b>	
<b>Nongeneral Funds</b>										
Student Tuition and Fees	\$ 32,845,650	\$ -	\$ 21,343,000	\$ -	\$ -	\$ -	\$ 54,188,650	\$ 1,834,650	3.5%	
Grants and Contracts	-	-	-	3,011,125	-	-	3,011,125	151,500	5.3%	
Sales and Services	-	22,063,500	-	-	-	-	22,063,500	50,500	0.2%	
Other Revenues	1,412,437	555,855	597,600	-	306,000	300,000	3,171,892	469,500	17.4%	
<b>Total Nongeneral Funds</b>	<b>\$ 34,258,087</b>	<b>\$ 22,619,355</b>	<b>\$ 21,940,600</b>	<b>\$ 3,011,125</b>	<b>\$ 306,000</b>	<b>\$ 300,000</b>	<b>\$ 82,435,167</b>	<b>\$ 2,506,150</b>	<b>3.1%</b>	
<b>Total University Sources</b>	<b>\$ 55,029,385</b>	<b>\$ 22,619,355</b>	<b>\$ 21,940,600</b>	<b>\$ 4,896,010</b>	<b>\$ 980,969</b>	<b>\$ 2,050,000</b>	<b>\$ 107,516,319</b>	<b>\$ 3,328,188</b>	<b>3.2%</b>	
<b>FY 2013-14 Uses</b>										
Instruction	\$ 29,509,817	\$ -	\$ 134,400	\$ -	\$ -	\$ -	\$ 29,644,217	\$ 673,090	2.3%	
Research and Public Service	1,077,850	-	45,785	-	-	-	1,123,635	50,484	4.7%	
Academic Support	9,360,820	-	158,656	-	-	-	9,519,476	219,487	2.4%	
Student Services	6,034,995	-	655,656	-	-	-	6,690,651	1,000,772	17.6%	
Institutional Support	3,889,921	-	708,998	-	-	-	4,598,919	93,718	2.1%	
Operation and Maintenance of Plant	5,155,982	-	1,732,000	-	-	-	6,887,982	363,772	5.6%	
Scholarships and Fellowships	-	-	2,087,500	4,896,010	-	-	6,983,510	230,865	3.4%	
Auxiliary Enterprises										
University Housing	-	5,690,494	233,104	-	-	-	5,923,598	776,416	15.1%	
Dining Services	-	6,619,395	280,494	-	-	-	6,899,889	168,335	2.5%	
Bookstore	-	2,208,481	-	-	-	-	2,208,481	(767,741)	-25.8%	
Other Services	-	8,100,985	15,795,620	-	-	-	23,896,605	458,490	2.0%	
Subtotal - Auxiliary Enterprises	-	22,619,355	16,309,218	-	-	-	38,928,573	635,500	1.7%	
Museums and Cultural Services										
Belmont	-	-	30,657	-	729,539	-	760,196	-	0.0%	
James Monroe Museum & Library	-	-	77,730	-	251,430	-	329,160	10,000	3.1%	
Subtotal - Museums/Cultural Services	-	-	108,387	-	980,969	-	1,089,356	10,000	0.9%	
Dahlgren Education/Research Center	-	-	-	-	-	2,050,000	2,050,000	50,000	2.5%	
<b>Total University Uses</b>	<b>\$ 55,029,385</b>	<b>\$ 22,619,355</b>	<b>\$ 21,940,600</b>	<b>\$ 4,896,010</b>	<b>\$ 980,969</b>	<b>\$ 2,050,000</b>	<b>\$ 107,516,319</b>	<b>\$ 3,327,688</b>	<b>3.2%</b>	

## 2013-14 Budget Plan by Fund Source and Key Priorities

- ❑ **Revenues and Expenditures:** Table B on page I-4 presents the 2013-14 revenue and expenditure budget by major fund source and program classification. Budgeted revenue is derived from two primary sources – state general fund appropriations (taxpayer support) and a variety of nongeneral fund revenues, including student tuition and fees.

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 Memorial Library), Student Financial Assistance, and Higher Education Centers (Dahlgren Education and Research Center).

Nongeneral funds describe revenues raised by UMW from student tuition and fees and a variety of other sources, including sales and services (room and board), 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 six fund groups: Educational and General (E&G) Programs, Auxiliary Enterprises, Comprehensive Fee, Student Financial Assistance, Museums and Cultural Services, and Higher Education Research Centers. Each of these fund groups is outlined below along with a summary of key budget changes for 2013-14.

- **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 student tuition and fee revenue and state general fund appropriations.
- Key cost drivers addressed in the 2013-14 budget include the following:
  - \$835,000 for a 3% permanent salary increase for teaching and administrative faculty effective July 25, 2013
  - \$220,000 for a 2% permanent salary increase for classified staff effective July 25, 2013
  - \$155,000 for a permanent salary compression adjustment for classified staff of \$65 for each year of eligible state service
  - \$896,000 for an 18% increase in the employer's cost of health insurance
  - \$73,000 to annualize 2012-13 salary actions and to replenish the Green Light pool
  - \$127,000 to establish an operation and maintenance pool for the Information Technology Convergence Center
  - \$207,000 for utilities, leases, and contracts
  - \$67,000 to support 12 faculty sabbaticals in 2013-14

- \$105,575 for the Quality Enhancement Program
  - \$73,000 to support “A Domain of One’s Own”
  - \$25,000 for continued development of an online learning initiative
  - \$310,000 for a new Orientation Program for new students
  - \$500,000 for staffing, software, recruiting and marketing in Admissions
  - \$77,000 for a part-time psychiatrist and conversion of a part-time psychologist to full-time in the Office of Counseling and Psychological Services
  - \$120,000 to convert three adjunct positions to full-time faculty positions
  - \$1,746,134 in reallocations and base budget adjustments, including the elimination of the one-time 3% bonus provided in December 2012, the reversal of one-time FY13 budget actions, planned savings identified by the Provost’s Office, and a reduction in the reimbursement requirement to the Department of Treasury for out-of-state students.
- In addition, the 2013-14 operating budget accommodates a revenue loss of about \$308,000 associated with a projected decline in out-of-state students between Fall 2012 and Fall 2013.
  - **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 cost drivers reflected in the 2013-14 budget include the following:

- \$100,000 for a 3% permanent salary increase for teaching and administrative faculty effective July 25, 2013
- \$75,000 for a 2% permanent salary increase for classified staff effective July 25, 2013
- \$55,000 for a permanent salary compression adjustment for classified staff of \$65 for each year of eligible state service effective July 25, 2013
- \$180,000 for an 18% increase in the employer cost of health insurance
- \$16,000 to annualize mid-year salary adjustments in 2012-13 and to replenish the Green Light pool



- \$681,000 for an increase in debt service costs for the Mason / Randolph renovations and improvements to the Battleground Athletic Complex
  - \$771,000 increase in the debt service reserve pool for the Campus Center
  - \$25,000 to establish an operation and maintenance pool for the Campus Center
  - \$50,000 for an estimated increase in the dining contract with Sodexo
  - \$15,000 for a 3.85% increase in the Apogee contract for residential network services
  - \$20,000 to support National Alumni Networks
  - \$1,937,352 in reallocations and base budget adjustments, including the elimination of the 3% bonus provided in December 2012, termination of debt service payments for Telecommunications and Alvey Hall, reallocation of \$300,000 in additional revenue realized in 2012-13 from an increase in residence hall occupancy (anticipated to continue in 2013-14), and reductions in Bookstore expenses.
- **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 cost drivers addressed in the 2013-14 Comprehensive Fee budget include the following:

- \$309,000 for an additional contribution to the debt reserve pool for the Campus Center. (Another portion of this reserve is funded in the Auxiliary budget.)
  - \$59,000 to establish an operation and maintenance pool for the Campus Center. (Another portion of this pool is supported in the Auxiliary budget.)
  - \$40,000 to offset room and board costs attributable to Washington/Alvey Scholarships.
- **Student Financial Assistance:** The student financial assistance budget is comprised of state and federal financial aid programs for students.

Key priorities reflected in the 2013-14 budget include the following:

- An increase of \$98,666 in general funds for the state's need-based aid program for in-state undergraduate students. General fund support for this program will total \$1,878,686 in 2013-14
- New state general fund support of \$6,199 for graduate fellowships
- Federal funding to support an increase of \$95, bringing the maximum Pell Grant to \$5,645 in 2013-14

- Federal financial aid funding is expected to be flat for Supplemental Educational Opportunity Grants (SEOG) and the federal Work-Study program.
- **Museums and Cultural Services:** The museums and cultural services program includes the operating budgets for Belmont and the James Monroe Museum and Memorial 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.

For the James Monroe Museum, the 2013 General Assembly provided an additional \$10,000 in general fund support beginning in 2013-14. No funding changes are reflected in the 2013-14 budget for Belmont.

- **Higher Education Centers:** The Higher Education Centers program reflects the operating budget for the Dahlgren Education and Research Center (DERC), which opened in January 2012. State general fund support for the DERC will decrease by \$150,000, for a revised level of state support of \$1,750,000 in 2013-14. The reduction in general fund support is part of a longer-term financing plan to reduce the level of general fund support and increase revenues generated on the campus from nongeneral fund sources. Revenue from nongeneral funds, primarily facilities rental, is expected to increase by \$200,000, bringing total nongeneral funds revenues to \$300,000 in 2013-14. In total, the DERC operating budget will be \$2,050,000 in 2013-14.

## University of Mary Washington 2013-14 Tuition and Fees

### Summary

Tuition and fee charges for the 2013-14 academic year are summarized below for selected student groups. These rates were approved by the Board of Visitors at meetings on November 17, 2012, and on April 19, 2013.

#### *Full-Time Undergraduates - University Housing*

	2012-13	2013-14	Change	
			Amount	%
In-State	\$18,086	\$18,782	\$696	3.8%
Out-of-State	\$30,400	\$31,652	\$1,252	4.1%

#### *Full-Time Undergraduates – Commuters*

	2012-13	2013-14	Change	
			Amount	%
In-State	\$9,246	\$9,660	\$414	4.5%
Out-of-State	\$21,560	\$22,530	\$970	4.5%

#### *Part-Time Graduate Students - Per Credit Hour*

	2012-13	2013-14	Change	
			Amount	%
In-State	\$426	\$444	\$18	4.2%
Out-of-State	\$846	\$883	\$37	4.4%

*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-5 to II-8.

### Key Considerations in 2013-14 Tuition and Fee Rate Setting

A number of factors were considered in setting the 2013-14 tuition and fee rates as summarized below:

**1. Unavoidable Cost Increases:** The university's operating budget estimates include a number of mandatory cost increases, including:

**a) State mandated salary increases:** The 2013 General Assembly approved a 3% salary increase for faculty and a 2% increase for classified staff, effective July 25, 2013. In

addition, classified staff with five or more years of eligible state service will receive a permanent salary increase equal to \$65 for each year of state service. The total estimated cost in E&G programs for the faculty and staff salary increases is estimated at \$1,210,000. Of the total cost increase, the university estimates that about \$614,000 will be funded from additional state general fund support. The balance of the cost will be funded from tuition and fee revenue.

For auxiliary programs, the cost of the salary increases is estimated at \$230,000. The university does not receive any state general fund support for auxiliary programs. As a result the entire cost of the salary increases must be supported from student fees and other auxiliary program charges, including room and board rates.

- b) **State mandated increase in employer health insurance premiums:** The 2013 General Assembly approved an 18% increase in the employer's cost of health insurance. For E&G programs, this cost increase is estimated at \$896,000, of which a projected \$484,000 will be supported from additional general funds. The balance of the cost will be funded from tuition and fees.

For auxiliary programs, the cost of the health insurance premium increase is estimated at \$180,000, all of which must be supported from student fees and other auxiliary program charges.

- c) **Leases, contracts, and utilities:** The university does not receive any direct state support for general operating increases, including inflation riders in leases and other contracts (e.g., the FRED transportation contract or the private vendor contract for residential network services), nor for utility rates or usage changes. For 2013-14, these costs are estimated to increase by \$222,000 and must be supported entirely with tuition, fees or other auxiliary user charges.
- d) **Annualization of mid-year salary actions during 2012-13:** As new faculty and staff are hired, the budget reflects only the salary and benefit costs required during the fiscal year. As a result, the difference between the current fiscal year cost and the full annualized cost must be budgeted in the next fiscal year. For 2013-14, salary annualization costs, both from mid-year hires and allocations from the university's Green Light pool, are estimated at \$108,000 in E&G programs and \$16,000 in auxiliary programs. These costs are supported entirely from tuition and fees.

- 2. **Debt Service and Other Facilities Costs:** The university's operating budget reflects several actions to fund current and future debt service requirements as well as the establishment of operation and maintenance pools for new facilities coming on-line in the near future. These actions are summarized below:

- a) **Renovation of Randolph and Mason Halls:** An increase of \$681,000 has been budgeted to cover the debt service requirements associated with the renovation of Randolph and Mason Halls. As auxiliary buildings, the university receives no state support for the debt service. The debt services costs are supported through university housing room rents.
- b) **New Campus Center:** In order to minimize the impact on student fees in a single year, the university has established a debt service reserve pool for the new Campus Center project. Funds will be budgeted into the reserve pool over several years until the required debt service is fully budgeted. For 2013-14, an additional \$1,080,000 will be added to the reserve pool

from board plan rate increases, the auxiliary comprehensive fee and the reallocation of existing debt service that will come off-line in 2013-14.

In addition to debt service reserve, the university has established a maintenance and operation reserve pool for the Campus Center. Although the Campus Center is not yet open, budgeting a portion of the operation and maintenance costs in 2013-14 will help to spread the impact on student fees over a longer time period. For 2013-14, \$84,000 from auxiliary fee revenue has been set aside for operation and maintenance costs for the Campus Center.

**c) Information Technology Convergence Center (ITCC):** As a state funded E&G project, the entire debt service for the ITCC will be supported from general funds. The operation and maintenance of an E&G facility like the ITCC, however, is typically a shared responsibility between the Commonwealth and the university. Much like the Campus Center, the university has established an operation and maintenance reserve pool to set aside funding for these costs once the facility opens. For 2013-14, \$127,000 has been budgeted in E&G programs, the cost of which is supported entirely from tuition.

**3. Changes in the Composition of Enrollment:** Based on recent enrollment trends, the 2013-14 budget reflects the revenue loss associated with a projected decline of 25 out-of-state students. Although these out-of-state students are expected to be replaced by additional in-state students, the tuition differential is such that a net revenue loss of about \$308,000 is anticipated as a result of the change in student mix. The 2013-14 tuition rates have been set to compensate for this loss.

**4. Other University Priorities and Initiatives:** The 2013-14 budget plan includes funding for a number of key initiatives that support the university's strategic plan and other priorities, including:

- a) Additional funding required to support a total of 12 faculty sabbaticals: \$67,000
- b) New funding to support the Quality Enhancement Program: \$105,575
- c) Establishment of the Domain of One's Own initiative: \$73,000
- d) Expansion of the university's On-Line Learning Initiative: \$25,000
- e) Enhancement of the Orientation Program for new students: \$310,000
- f) Additional funding for staffing, software, recruiting and marketing in the Office of Admissions: \$500,000
- g) Supplemental funding to support a part-time psychiatrist and a full-time psychologist position in Counseling and Psychological Services: \$77,000
- h) Funding to support the conversion of three adjunct positions to full-time: \$120,000

**5. Market Considerations:** Current data on 2012-13 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 9<sup>th</sup> (#1 being the highest charges; #15 the lowest).

Similarly, UMW's 2012-13 tuition and fee charges for out-of-state students are ranked 11<sup>th</sup> out of the 15 Virginia institutions.

The 2012-13 rankings were unchanged from the 2011-12 rankings and no changes are anticipated with regard to the 2013-14 tuition and fee rankings.

A comparison of 2012-13 tuition and fee charges among Virginia's public four-year institutions is presented on page II-9.

**The detailed tuition and fee schedules for 2013-14 are presented on pages II-5 through II-8.**

**University of Mary Washington**  
**2013-14 Tuition and Fees**

	In-State Students			Out-of-State Students		
	2012-13	2013-14	% Chg.	2012-13	2013-14	% Chg.
<b><i>Full-Time Undergraduates</i></b>						
<b><i>Living in University Housing</i></b>						
Tuition	\$4,686	\$4,896	4.5%	\$17,000	\$17,766	4.5%
E&G Comprehensive Fee	1,782	1,862	4.5%	1,782	1,862	4.5%
Auxiliary Comprehensive Fee	2,778	2,902	4.5%	2,778	2,902	4.5%
Housing (1)	5,384	5,598	4.0%	5,384	5,598	4.0%
Board (2)	3,456	3,524	2.0%	3,456	3,524	2.0%
<b>Total</b>	<b>\$18,086</b>	<b>\$18,782</b>	<b>3.8%</b>	<b>\$30,400</b>	<b>\$31,652</b>	<b>4.1%</b>

(1) Based on double-occupancy room.

(2) Based on 150 block / \$300 flex dollars plan.

***Full-Time Undergraduates***  
***Living in Private Housing***

Tuition	\$4,686	\$4,896	4.5%	\$17,000	\$17,766	4.5%
E&G Comprehensive Fee	1,782	1,862	4.5%	1,782	1,862	4.5%
Auxiliary Comprehensive Fee	2,778	2,902	4.5%	2,778	2,902	4.5%
<b>Total</b>	<b>\$9,246</b>	<b>\$9,660</b>	<b>4.5%</b>	<b>\$21,560</b>	<b>\$22,530</b>	<b>4.5%</b>

***Part-Time Undergraduates***  
***(Per credit hour rates)***

Tuition	\$200	\$209	4.5%	\$712	\$744	4.5%
E&G Comprehensive Fee	49	51	4.1%	49	51	4.1%
Auxiliary Comprehensive Fee	80	83	3.8%	80	83	3.8%
<b>Total</b>	<b>\$329</b>	<b>\$343</b>	<b>4.3%</b>	<b>\$841</b>	<b>\$878</b>	<b>4.4%</b>

***Part-Time Graduates***  
***(Per credit hour rates)***

Tuition	\$297	\$310	4.4%	\$717	\$749	4.5%
E&G Comprehensive Fee	49	51	4.1%	49	51	4.1%
Auxiliary Comprehensive Fee	80	83	3.8%	80	83	3.8%
<b>Total</b>	<b>\$426</b>	<b>\$444</b>	<b>4.2%</b>	<b>\$846</b>	<b>\$883</b>	<b>4.4%</b>

**University of Mary Washington  
2013-14 Tuition and Fees**

	In-State Students			Out-of-State Students		
	2012-13	2013-14	% Chg.	2012-13	2013-14	% Chg.
<b><i>Randolph and Mason Halls</i></b>						
Single Room Rate	\$7,508	\$7,808	4.0%	\$7,508	\$7,808	4.0%
Double Room Rate	\$6,284	\$6,534	4.0%	\$6,284	\$6,534	4.0%
<b><i>Alvey and Arrington Halls</i></b>						
Single Room Rate	\$6,788	\$7,060	4.0%	\$6,788	\$7,060	4.0%
Double Room Rate	\$5,564	\$5,786	4.0%	\$5,564	\$5,786	4.0%
<b><i>Willard Hall</i></b>						
Single Room Rate	\$7,508	\$7,808	4.0%	\$7,508	\$7,808	4.0%
<b><i>All Other University Housing</i></b>						
Single Room Rate	\$6,608	\$6,872	4.0%	\$6,608	\$6,872	4.0%
Double Room Rate	\$5,384	\$5,598	4.0%	\$5,384	\$5,598	4.0%
Triple Room Rate	\$5,126	\$5,330	4.0%	\$5,126	\$5,330	4.0%
Quad Room Rate	\$4,862	\$5,056	4.0%	\$4,862	\$5,056	4.0%
<b><i>University Apartments</i></b>						
Single Room Apartment Rate	\$7,920	\$8,316	5.0%	\$7,920	\$8,316	5.0%
Double Room Apartment Rate	\$6,518	\$6,844	5.0%	\$6,518	\$6,844	5.0%
Triple Room Apartment Rate	\$5,882	\$6,176	5.0%	\$5,882	\$6,176	5.0%
<b><i>Eagle Landing</i></b>						
Academic Year Contract - Double Room Rate	\$7,070	\$7,536	6.6%	\$7,070	\$7,536	6.6%
Full Year Contract - Double Room Rate	\$8,258	\$8,802	6.6%	\$8,258	\$8,802	6.6%



**University of Mary Washington  
2013-14 Tuition and Fees**

	<u>In-State Students</u>			<u>Out-of-State Students</u>		
	<u>2012-13</u>	<u>2013-14</u>	<u>% Chg.</u>	<u>2012-13</u>	<u>2013-14</u>	<u>% Chg.</u>
<b><i>University Meal Plans</i></b>						
Super Meal Plan (\$100 flex per semester)	\$5,142	\$5,244	2.0%	\$5,142	\$5,244	2.0%
275 Meal Block Plan (\$200 flex per semester)	\$4,854	\$4,950	2.0%	\$4,854	\$4,950	2.0%
225 Meal Block Plan (\$200 flex per semester)	\$3,602	\$3,674	2.0%	\$3,602	\$3,674	2.0%
150 Meal Block Plan (\$300 flex per semester)	\$3,456	\$3,524	2.0%	\$3,456	\$3,524	2.0%
90 Meal Block Plan (\$175 flex per semester)	\$1,942	\$1,980	2.0%	\$1,942	\$1,980	2.0%
60 Meal Block Plan (\$75 flex per semester)	\$1,122	\$1,144	2.0%	\$1,122	\$1,144	2.0%
 <b><i>Summer Housing Rates</i></b>						
	<u>Summer 2013</u>			<u>Summer 2014</u>		
	<u>Session / Week / Day</u>			<u>Session / Week / Day</u>		<u>Inc.</u>
Eagle Landing						
Single	\$1,318 / 264 / 38			\$1,405 / 281 / 41		6.6%
Double	\$1,075 / 215 / 33			\$1,146 / 229 / 35		6.6%
University Apartments						
Single	\$1,254 / 257 / 38			\$1,317 / 274 / 40		5.0%
Double	\$1,033 / 209 / 32			\$1,085 / 219 / 34		5.0%
Triple	\$930 / 187 / 29			\$977 / 196 / 30		5.0%
University Housing						
Single	\$1,010 / 199 / 28			\$1,050 / 209 / 29		4.0%
Double	\$760 / 152 / 22			\$790 / 158 / 23		4.0%
Summer Meal Plan - 50 Meals per Session	\$350			\$365		4.3%

**University of Mary Washington**  
**2013-14 Tuition and Fees**

	In-State Students			Out-of-State Students		
	2012-13	2013-14	% Chg.	2012-13	2013-14	% Chg.
<b><i>Other Undergraduate/Graduate Fees and Charges</i></b>						
Undergraduate overload fee <i>(per credit hour over 18 semester hrs.)</i>	\$200	\$209	4.5%	\$712	\$744	4.5%
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>	\$321	\$335	4.4%	n/a	n/a	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	\$275	83.3%	\$150	\$275	83.3%
New Experiences for Students Transitioning (NEST)						
Service Program	n/a	\$275	n/a	n/a	\$275	n/a
Social Justice Program	n/a	\$300	n/a	n/a	\$300	n/a
Outdoor Adventure Program	n/a	\$300	n/a	n/a	\$300	n/a
Late Payment Fee	10% of unpaid balance up to \$250					
Returned Check Fee	\$50	\$50	0.0%	\$50	\$50	0.0%
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%
COE student background checks <i>(prior to start of field experience)</i>	\$37	\$37	0.0%	\$37	\$37	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>	\$0	\$0	n/a	\$0	\$0	n/a
Music - Private lessons (per course)	\$65	\$65	0.0%	\$65	\$65	0.0%
Equestrian Fee (per semester)						
Beginner students	\$773	\$775	0.3%	\$773	\$775	0.3%
Intermediate & advanced students	\$835	\$840	0.6%	\$835	\$840	0.6%
Parking Decal (on-campus, academic year)	\$200	\$200	0.0%	\$200	\$200	0.0%
Eagle Landing Parking Deck and Decal	\$350	\$350	0.0%	\$350	\$350	0.0%

## Undergraduate Cost Comparisons

In-State and Out-of-State Tuition, Required Fees, and Room and Board Charges  
Virginia State Supported Four-Year Institutions  
**2012-13 - FINAL**

Rank	IS Commuter*		OS Commuter*		Room & Board		IS Total		OS Total	
1	VMI	\$13,835	UVA	\$38,018	CNU	\$9,728	W&M	\$22,888	UVA	\$47,437
2	W&M	\$13,570	W&M	\$37,344	VSU	\$9,680	VMI	\$21,568	W&M	\$46,662
3	UVA	\$12,006	VMI	\$33,811	UVA-W	\$9,440	UVA	\$21,425	VMI	\$41,544
4	VT	\$10,923	GMU	\$27,764	UVA	\$9,419	CNU	\$20,300	GMU	\$36,444
5	LU	\$10,890	VT	\$25,915	W&M	\$9,318	LU	\$19,338	VT	\$33,169
6	CNU	\$10,572	VCU	\$23,912	<b>UMW</b>	<b>\$8,840</b>	VCU	\$18,633	VCU	\$32,660
7	VCU	\$9,885	ODU	\$23,330	VCU	\$8,748	GMU	\$18,300	UVA-W	\$31,915
8	GMU	\$9,620	LU	\$23,220	GMU	\$8,680	VT	\$18,177	ODU	\$31,877
9	<b>UMW</b>	<b>\$9,246</b>	JMU	\$22,796	JMU	\$8,630	<b>UMW</b>	<b>\$18,086</b>	LU	\$31,668
10	JMU	\$8,808	UVA-W	\$22,475	ODU	\$8,547	UVA-W	\$17,547	JMU	\$31,426
11	RU	\$8,590	<b>UMW</b>	<b>\$21,560</b>	LU	\$8,448	JMU	\$17,438	<b>UMW</b>	<b>\$30,400</b>
12	ODU	\$8,450	NSU	\$20,360	NSU	\$8,130	VSU	\$17,100	CNU	\$29,850
13	UVA-W	\$8,107	RU	\$20,160	RU	\$7,881	ODU	\$16,997	NSU	\$28,490
14	VSU	\$7,420	CNU	\$20,122	VMI	\$7,733	RU	\$16,471	RU	\$28,041
15	NSU	\$6,860	VSU	\$16,388	VT	\$7,254	NSU	\$14,990	VSU	\$26,068

\*Includes tuition and mandatory fees.

Source: SCHEV 2012 Tuition and Fee Report, July 2012.

# University of Mary Washington 2013-14 University Budget Plan

## Glossary of Budget Terms

### I. Revenue

Budgeted revenue is derived from either state appropriated tax funds 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.

**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 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, and Education. 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. Includes funding for the Economic Development Center.

**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.

**Higher Education Centers:** Expenditures related to the operation of the Dahlgren Education and Research Center.

### **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 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 60 Meal Commuter Block 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.

Meal plans are also available to commuter students. 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 prior to the start of classes and who has paid Virginia state income tax for the prior year. Certain exceptions are made for military personnel.

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