



2014-15  
University Budget Plan  
and  
Tuition and Fees

UMW Board of Visitors  
May 9, 2014

**University of Mary Washington  
2014-15 University Budget Plan  
Tuition and Fees**

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**TABLE A**

**University of Mary Washington  
2014-15 University Budget Plan**

	2013-14 Revised Budget	2014-15 Budget Plan	Change Over 2013-14
<b>Sources</b>			
State General Funds*			
Educational and General Programs	\$ 21,436,884	\$ 23,234,410	8.4%
Student Financial Assistance	1,884,885	1,934,885	2.7%
Belmont / James Monroe Museum	674,969	701,665	4.0%
Dahlgren Campus	<u>1,750,000</u>	<u>1,750,000</u>	0.0%
Total General Funds	\$ 25,746,738	\$ 27,620,960	7.3%
Nongeneral Funds			
Student Tuition and Fees	\$ 52,886,500	\$ 55,727,000	5.4%
Sales and Services			
Housing	10,341,500	10,641,000	2.9%
Dining	9,690,000	10,070,000	3.9%
Bookstore	2,335,000	2,335,000	0.0%
Grants and Contracts	2,789,317	2,919,317	4.7%
Other Sources	<u>3,171,264</u>	<u>3,243,365</u>	2.3%
Total Nongeneral Funds	\$ 81,213,581	\$ 84,935,682	4.6%
<b>Total Sources</b>	<u>\$ 106,960,319</u>	<u>\$ 112,556,642</u>	5.2%
<b>Uses</b>			
Instruction	\$ 28,901,228	\$ 30,740,616	6.4%
Research and Public Service	1,025,310	1,081,460	5.5%
Academic Support	9,899,176	10,343,176	4.5%
Student Services	6,790,943	7,336,343	8.0%
Institutional Support	3,934,266	3,973,917	1.0%
Operation and Maintenance of Plant	7,122,503	7,611,345	6.9%
Scholarships and Fellowships	6,761,702	7,041,702	4.1%
Auxiliary Enterprises	39,395,552	41,196,748	4.6%
Museums & Cultural Services	1,079,639	1,106,335	2.5%
Higher Education Centers	<u>2,050,000</u>	<u>2,125,000</u>	3.7%
<b>Total Uses</b>	<u>\$ 106,960,319</u>	<u>\$ 112,556,642</u>	5.2%
<b>Budget Balance</b>	<u>\$ -</u>	<u>\$ -</u>	

\* Includes both direct appropriations and estimated central transfers.

# University of Mary Washington 2014-15 University Budget Plan

## Highlights

### Overview

- ❑ At the time the University of Mary Washington’s preliminary 2014-15 budget plan was prepared, the 2014 General Assembly was still in a Special Session and the 2014-16 state biennial budget had not been completed. For purposes of this budget, a number of assumptions have been made with regard to state budget actions, which are described in the 2014 General Assembly section below. In addition, the preliminary budget plan reflects proposed 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 2014-15.
  - The budget is balanced with projected sources and uses estimated at \$112.6 million.
  - The 2014-15 preliminary budget represents a 5.2% increase over the current budget.

### 2014 General Assembly

- ❑ The university’s preliminary 2014-15 spending plan reflects a number of assumptions regarding state funding levels and other actions affecting compensation and employer fringe benefit costs. Where there are differences in the House and Senate budget recommendations, a point between the two budgets was assumed for purposes of the university’s budget. Key state budget assumptions affecting the university’s operating budget are summarized below:
  - An increase in general funds for base operating support in Educational and General (E&G) programs of \$1.0 million. This estimate is lower than the House budget but higher than the recommendation of the Senate.
  - Additional general fund support of \$125,000 to offset costs related to the establishment of a new BS Nursing degree completion program. This amount represents the average of the House and Senate budgets.
  - Elimination of TJ21 reallocation requirements established in the 2012-14 budget. Both the House and Senate budgets reflect this action.
  - Mandatory increases in state fringe benefit rates, the cost of which will be funded by both general funds and tuition and fee revenue. These changes are reflected in both the House and Senate budgets:

<b>Fringe Benefit</b>	<b>2013-14</b>	<b>2014-15</b>
VRS	8.76%	12.33%
Group Life	1.19%	1.32%
Disability	0.47%	0.62%
Retiree Health Credit	1.00%	1.17%

- Implementation of a 1% salary increase for faculty and staff effective December 10, 2014, based on the Senate's budget. The cost of the salary increase will be supported from both state general funds and tuition and fee revenue.
- An increase of \$50,000 in general funds for need-based aid for undergraduate students through the state's financial assistance program. Under this assumption, general fund support for this program will total \$1.9 million in 2014-15. This estimate reflects a point between the House and Senate budget recommendations.
- Stable funding for the Higher Education Equipment Trust Fund (HEETF), with a planned allocation to UMW of \$528,587 in each year of the 2014-16 biennium. This action is reflected in both the House and Senate recommended budgets.

**Tuition and Fees**

- The 2014-15 budget plan is based on housing and dining rates approved by the Board of Visitors at its meeting on November 15, 2013, and on proposed tuition and fee rates as presented on pages II-5 through II-8. The following is a summary of the total recommended tuition and fee charges for 2014-15:

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

	<u>2013-14</u>	<u>2014-15</u>	<u>Change</u>
In-State	\$18,782	\$19,682	4.8%
Out-of-State	\$31,652	\$32,968	4.2%

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

	<u>2013-14</u>	<u>2014-15</u>	<u>Change</u>
In-State	\$9,660	\$10,252	6.1%
Out-of-State	\$22,530	\$23,538	4.5%

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

**Enrollment**

- The 2014-15 budget plan assumes a steady total headcount enrollment of 4,830 for Fall 2014. Within this total, an estimated decline in primarily part-time graduate enrollments is projected to be offset by an increase in full-time undergraduate students. Overall, the impact of these enrollment shifts is projected to be revenue-neutral.

<b>Headcount</b>	<u>Actual Fall 2013</u>			<u>Projected Fall 2014</u>		
	<u>I/S</u>	<u>O/S</u>	<u>Total</u>	<u>I/S</u>	<u>O/S</u>	<u>Total</u>
Undergraduate	3,930	501	4,431	4,015	500	4,515
Graduate	383	17	400	305	10	315
Total	4,313	518	4,831	4,320	510	4,830

*Includes Fredericksburg and Stafford campuses*

**TABLE B**  
**University of Mary Washington**  
**2014-15 University Budget Plan**  
**Sources and Uses Summary**

FY 2014-15 Sources	Educational & General Programs	Auxiliary Enterprises	Comp Fee	Student Financial Assistance	Museums & Cultural Services	Higher Education Centers	Total University	Change from 2013-14 Budget	
								Amount	Percent
<b>State General Fund</b>									
Direct Appropriations	\$ 22,308,471	\$ -	\$ -	\$ 1,877,885	\$ 701,665	\$ 1,750,000	\$ 26,638,021	\$ 2,585,039	10.7%
Central Transfers	925,939	-	-	57,000	-	-	982,939	(710,817)	-42.0%
<b>Total General Fund</b>	<b>\$ 23,234,410</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 1,934,885</b>	<b>\$ 701,665</b>	<b>\$ 1,750,000</b>	<b>\$ 27,620,960</b>	<b>\$ 1,874,222</b>	<b>7.3%</b>
<b>Nongeneral Funds</b>									
Student Tuition and Fees	\$ 33,176,000	\$ -	\$ 22,551,000	\$ -	\$ -	\$ -	\$ 55,727,000	\$ 2,840,500	5.4%
Grants and Contracts	-	-	-	2,919,317	-	-	2,919,317	130,000	4.7%
Sales and Services	-	23,046,000	-	-	-	-	23,046,000	679,500	3.0%
Other Revenues	1,450,000	570,000	585,000	-	263,365	375,000	3,243,365	72,101	2.3%
<b>Total Nongeneral Funds</b>	<b>\$ 34,626,000</b>	<b>\$ 23,616,000</b>	<b>\$ 23,136,000</b>	<b>\$ 2,919,317</b>	<b>\$ 263,365</b>	<b>\$ 375,000</b>	<b>\$ 84,935,682</b>	<b>\$ 3,722,101</b>	<b>4.6%</b>
<b>Total University Sources</b>	<b>\$ 57,860,410</b>	<b>\$ 23,616,000</b>	<b>\$ 23,136,000</b>	<b>\$ 4,854,202</b>	<b>\$ 965,030</b>	<b>\$ 2,125,000</b>	<b>\$ 112,556,642</b>	<b>\$ 5,596,323</b>	<b>5.2%</b>
<b>FY 2014-15 Uses</b>									
Instruction	\$ 30,615,916	\$ -	\$ 124,700	\$ -	\$ -	\$ -	\$ 30,740,616	\$ 1,839,388	6.4%
Research and Public Service	1,061,677	-	19,783	-	-	-	1,081,460	56,150	5.5%
Academic Support	10,250,676	-	92,500	-	-	-	10,343,176	444,000	4.5%
Student Services	6,152,705	-	1,183,638	-	-	-	7,336,343	545,400	8.0%
Institutional Support	3,889,588	-	84,329	-	-	-	3,973,917	39,651	1.0%
Operation and Maintenance of Plant	5,889,848	-	1,721,497	-	-	-	7,611,345	488,842	6.9%
Scholarships and Fellowships	-	-	2,187,500	4,854,202	-	-	7,041,702	280,000	4.1%
Auxiliary Enterprises									
University Housing	-	4,753,815	173,391	-	-	-	4,927,206	47,713	1.0%
Dining Services	-	6,741,455	280,494	-	-	-	7,021,949	188,903	2.8%
Bookstore	-	2,205,843	-	-	-	-	2,205,843	10,643	0.5%
Other Services	-	9,914,887	17,126,863	-	-	-	27,041,750	1,553,937	6.1%
Subtotal - Auxiliary Enterprises	-	23,616,000	17,580,748	-	-	-	41,196,748	1,801,196	4.6%
Museums and Cultural Services									
Belmont	-	-	51,719	-	717,983	-	769,702	19,079	2.5%
James Monroe Museum & Library	-	-	89,586	-	247,047	-	336,633	7,617	2.3%
Subtotal - Museums/Cultural Services	-	-	141,305	-	965,030	-	1,106,335	26,696	2.5%
Dahlgren Education/Research Center	-	-	-	-	-	2,125,000	2,125,000	75,000	3.7%
<b>Total University Uses</b>	<b>\$ 57,860,410</b>	<b>\$ 23,616,000</b>	<b>\$ 23,136,000</b>	<b>\$ 4,854,202</b>	<b>\$ 965,030</b>	<b>\$ 2,125,000</b>	<b>\$ 112,556,642</b>	<b>\$ 5,596,323</b>	<b>5.2%</b>

## 2014-15 Budget Plan by Fund Source and Key Priorities

- ❑ **Revenues and Expenditures:** Table B on page I-4 presents the 2014-15 revenue and expenditure budgets 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 2014-15.

- **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 preliminary 2014-15 budget include the following:
  - \$275,400 for a 1% permanent salary increase for faculty and staff effective December 10, 2014
  - \$1,136,000 for a 41% increase in the employer's cost of VRS payments
  - \$328,000 for a 5% increase in the employer's share of health insurance premiums
  - \$154,000 for the employer's cost of rate increases in other fringe benefits
  - \$197,000 to annualize the 2013-14 permanent 3% salary increase
  - \$25,000 to annualize 2013-14 Green Light allocations and to replenish the pool for 2014-15
  - \$128,000 to increase the operation and maintenance pool for the Information Technology Convergence Center, which will open in August 2014
  - \$247,000 for utilities, leases, and contracts
  - \$70,000 to annualize 2013-14 staffing actions
  - \$118,000 for the First-Year Experience Program

- \$150,000 for the BS Nursing degree completion program
  - \$100,000 for new faculty positions for the new MS Geospatial Analysis program
  - \$25,000 for continued development of an online learning initiative
  - \$25,000 to replace expiring grant funds for the Rappahannock Scholars Program
  - \$219,000 for software and contracts in Admissions
  - \$110,000 for Scheduling Management software
  - \$45,000 student retention initiatives
- In addition, the 2014-15 operating budget permanently corrects a structural deficit in the budget of \$1.3 million associated with an enrollment decline in 2013-14. The 2013-14 budget was balanced using a number of one-time expenditure savings and revenues.
- **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 2014-15 budget include the following:

- \$50,000 for a 1% permanent salary increase for faculty and staff effective December 10, 2014
- \$176,000 for a 41% increase in VRS rates
- \$61,000 for a 5% increase in the employer cost of health insurance
- \$25,000 for other fringe benefit rate increases in group life, disability insurance, workers' compensation, and the retiree health credit
- \$30,000 to annualize the 3% salary increase in 2013-14
- \$16,000 to annualize mid-year salary adjustments in 2013-14 and to replenish the Green Light pool
- \$178,000 to increase the debt service reserve pool for the Campus Center
- \$92,000 for an estimated increase in the dining contract with Sodexo
- \$15,000 for a 4.85% increase in the Apogee contract for residential network services



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

Key cost drivers addressed in the 2014-15 Comprehensive Fee budget include the following:

- o \$318,000 for an additional contribution to the debt reserve pool for the Campus Center. (Another portion of this reserve is funded in the Auxiliary budget.)
  - o \$107,000 for an additional contribution to the operation and maintenance pool for the Campus Center
  - o \$100,000 to support student aid allocations in the Emerging Leaders program
  - o \$585,000 to offset operating costs and new initiatives in the E&G Programs budget
  - o \$120,000 to establish a permanent funding source for a grant writing contract with a private entity
- **Student Financial Assistance:** The student financial assistance budget is comprised of state and federal financial aid programs for students.

Key priorities reflected in the 2014-15 budget include the following:

- o An estimated increase of \$50,000 in general funds for the state's need-based aid program for in-state undergraduate students. With this projected increase, General fund support for this program will total \$1,934,885 in 2014-15
  - o Federal funding to support an increase of \$85, bringing the maximum Pell Grant to \$5,730 in 2014-15
  - o 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.

The 2014-15 budget reflects additional general fund support of \$19,079 for Belmont and \$7,617 for the James Monroe Museum to offset the cost of salary and fringe benefit rate changes.

- **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 continue at \$1,750,000 in 2014-15. Revenue from nongeneral funds, primarily facilities rental, is

expected to increase by \$150,000, bringing total nongeneral funds revenues to \$450,000 in 2014-15. In total, the DERC operating budget will be \$2,200,000 in 2014-15.

## University of Mary Washington 2014-15 Tuition and Fees

### Summary

Tuition and fee charges for the 2014-15 academic year are summarized below for selected student groups. The rates for housing and dining were approved by the Board of Visitors at its meeting on November 15, 2013.

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

	2013-14	2014-15	Change	
			Amount	%
In-State	\$18,782	\$19,682	\$900	4.8%
Out-of-State	\$31,652	\$32,968	\$1,316	4.2%

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

	2013-14	2014-15	Change	
			Amount	%
In-State	\$9,660	\$10,252	\$592	6.1%
Out-of-State	\$22,530	\$23,538	\$1,008	4.5%

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

	2013-14	2014-15	Change	
			Amount	%
In-State	\$444	\$473	\$18	6.5%
Out-of-State	\$883	\$923	\$37	4.5%

*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 2014-15 Tuition and Fee Rate Setting

A number of factors were considered in setting the 2014-15 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 preliminary budget plan assumes that the General Assembly will approve a 1% salary increase for faculty and staff, effective December 10,

2014. The total estimated cost in E&G programs for the faculty and staff salary increases is estimated at \$275,400. Of the total cost increase, the university estimates that about \$125,000 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 1 % salary increase is estimated at \$50,000. The university does not receive any state general fund support for auxiliary programs. As a result the entire cost of the salary increase must be supported from student fees and other auxiliary program charges, including room and board rates.

In addition to the new 1% increase in 2014-15, the cost to annualize the 2013-14 salary increase of 3% must be funded. Annualization of the 2013-14 increase is required because it was effective for only 20 of 24 pay periods for faculty and 21 of 24 pay periods for staff. The annualization cost is estimated at \$197,000 in E&G programs and \$30,000 in auxiliary programs.

- b) State mandated increases in VRS payments and other fringe benefit costs:** The 2014 General Assembly is anticipated to approve a 41% increase in the employer's contribution rate for VRS participants. For E&G programs, this cost increase is estimated at \$1.1 million, of which a projected \$519,000 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 VRS rate increase is estimated at \$176,000, all of which must be supported from student fees and other auxiliary program charges.

The General Assembly is expected to also mandate a 5% increase in the employer's cost of health insurance premiums. For E&G programs, this cost is projected to be \$328,000, of which an estimated \$175,000 will be supported from general funds and the balance from tuition and fees.

For auxiliary programs, the cost of the health insurance increase is estimated at \$61,000, the entire cost of which will support from student fees and other auxiliary charges.

Other fringe benefit costs (group life, disability insurance, workers' compensation, retiree health credit) are projected to increase by \$154,000 in E&G programs and \$25,000 in auxiliary programs. Approximately \$79,000 of the total cost in E&G programs will be supported with general funds, while the entire cost in auxiliary programs will be borne by student fees and other 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 2014-15, these costs are estimated to increase by \$247,000 in E&G programs \$107,000 in auxiliary programs. These costs must be supported entirely with tuition, fees or other auxiliary user charges.
- d) Annualization of mid-year salary actions during 2013-14:** As new faculty and staff are hired, the budget reflects only the salary and benefit costs required in that fiscal year. As a result, the difference between the current fiscal year cost and the full annualized cost must be funded in the next fiscal year. For 2014-15, salary annualization costs, both from mid-year hires and allocations from the university's Green Light pool, are estimated at \$95,000 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 future debt service requirements as well as operation and maintenance pools for new facilities coming on-line in the near future. These actions are summarized below:

- a) **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 2014-15, an additional \$496,000 will be added to the reserve pool from board plan rate increases and the auxiliary comprehensive fee.

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 2014-15 will help to spread the impact on student fees over a longer time period. For 2014-15, \$107,000 from auxiliary comprehensive fee revenue has been set aside for operation and maintenance costs for the Campus Center.

- b) **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 2014-15, the ITCC operation and maintenance pool in E&G programs has been increased by \$128,000, the cost of which is supported entirely from tuition. Neither the House nor Senate budget recommendations include new general funds specifically for operation and maintenance costs.

3. **Changes in Enrollment:** In 2013-14, an enrollment decline created a structural imbalance in the university's budget of approximately \$1.3 million. The 2013-14 revenue shortfall was addressed through a number of one-time budget savings and reductions as well as the availability of a non-recurring revenue source. The 2014-15 budget corrects this imbalance with an increase of \$1.3 million in additional operating budget supported by a combination of tuition rate adjustments and additional general funds. For 2014-15, enrollments are projected to be stable with the prior year with no associated revenue impact.

4. **Other University Priorities and Initiatives:** The 2014-15 budget plan includes funding for a number of key initiatives that support the university's strategic plan and other priorities, including:

- a) Continued roll-out of the First-Year Experience Program: \$118,000
- b) Start-up funding for BS Nursing degree completion program: \$150,000
- c) New faculty positions for MS Geospatial Analysis program: \$100,000
- d) Expansion of the university's On-Line Learning Initiative: \$25,000
- e) Additional funding for software and contracts in the Office of Admissions: \$219,000
- f) Implementation of a Scheduling Management software program: \$110,000

- g) Support for student retention initiatives: \$45,000
- h) Replace expiring grant funds for the Rappahannock Scholars Program: \$25,000
- i) Provide student financial aid support for the Emerging Leaders Program for newly enrolling students: \$100,000
- j) Establish a permanent funding source for the university's grant-writing contract: \$120,000

**5. Market Considerations:** Current data on 2013-14 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 2013-14 tuition and fee charges for out-of-state students are ranked 11<sup>th</sup> out of the 15 Virginia institutions.

The 2013-14 rankings were unchanged from the 2012-13 rankings and no changes are anticipated with regard to the 2014-15 tuition and fee rankings.

A comparison of 2013-14 tuition and fee charges among Virginia's public four-year institutions is presented on page II-9.

**The detailed tuition and fee schedules for 2014-15 are presented on pages II-5 through II-8.**

**University of Mary Washington**  
**2014-15 Tuition and Fees**

	In-State Students			Out-of-State Students		
	2013-14	2014-15	% Chg.	2013-14	2014-15	% Chg.
<b>Full-Time Undergraduates</b>						
<b>Living in University Housing</b>						
Tuition	\$4,896	\$5,190	6.0%	\$17,766	\$18,476	4.0%
E&G Comprehensive Fee	1,862	1,956	5.0%	1,862	1,956	5.0%
Auxiliary Comprehensive Fee	2,902	3,106	7.0%	2,902	3,106	7.0%
Housing (1)	5,598	5,766	3.0%	5,598	5,766	3.0%
Board (2)	3,524	3,664	4.0%	3,524	3,664	4.0%
<b>Total</b>	<b>\$18,782</b>	<b>\$19,682</b>	<b>4.8%</b>	<b>\$31,652</b>	<b>\$32,968</b>	<b>4.2%</b>

(1) Based on double-occupancy room.

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

<b>Full-Time Undergraduates</b>						
<b>Living in Private Housing</b>						
Tuition	\$4,896	\$5,190	6.0%	\$17,766	\$18,476	4.0%
E&G Comprehensive Fee	1,862	1,956	5.0%	1,862	1,956	5.0%
Auxiliary Comprehensive Fee	2,902	3,106	7.0%	2,902	3,106	7.0%
<b>Total</b>	<b>\$9,660</b>	<b>\$10,252</b>	<b>6.1%</b>	<b>\$22,530</b>	<b>\$23,538</b>	<b>4.5%</b>

<b>Part-Time Undergraduates</b>						
<b>(Per credit hour rates)</b>						
Tuition	\$209	\$222	6.2%	\$744	\$774	4.0%
E&G Comprehensive Fee	51	\$53	3.9%	51	53	3.9%
Auxiliary Comprehensive Fee	83	91	9.6%	83	91	9.6%
<b>Total</b>	<b>\$343</b>	<b>\$366</b>	<b>6.7%</b>	<b>\$878</b>	<b>\$918</b>	<b>4.6%</b>

<b>Part-Time Graduates</b>						
<b>(Per credit hour rates)</b>						
Tuition	\$310	\$329	6.1%	\$749	\$779	4.0%
E&G Comprehensive Fee	51	53	3.9%	51	53	3.9%
Auxiliary Comprehensive Fee	83	91	9.6%	83	91	9.6%
<b>Total</b>	<b>\$444</b>	<b>\$473</b>	<b>6.5%</b>	<b>\$883</b>	<b>\$923</b>	<b>4.5%</b>

<b>MS Geospatial Analysis Program</b>						
<b>(Per credit hour rates)</b>						
Tuition	n/a	\$322	n/a	n/a	\$779	n/a
E&G Comprehensive Fee	n/a	53	n/a	n/a	53	n/a
Auxiliary Comprehensive Fee	n/a	86	n/a	n/a	86	n/a
MSGA Laboratory/Equipment Fee	n/a	100	n/a	n/a	100	n/a
<b>Total</b>	<b>n/a</b>	<b>\$561</b>	<b>n/a</b>	<b>n/a</b>	<b>\$1,018</b>	<b>n/a</b>

**University of Mary Washington**  
**2014-15 Tuition and Fees**

	In-State Students			Out-of-State Students		
	2013-14	2014-15	% Chg.	2013-14	2014-15	% Chg.
<b><i>Randolph and Mason Halls</i></b>						
Single Room Rate	\$7,808	\$8,042	3.0%	\$7,808	\$8,042	3.0%
Double Room Rate	\$6,534	\$6,730	3.0%	\$6,534	\$6,730	3.0%
<b><i>Alvey and Arrington Halls</i></b>						
Single Room Rate	\$7,060	\$7,272	3.0%	\$7,060	\$7,272	3.0%
Double Room Rate	\$5,786	\$5,960	3.0%	\$5,786	\$5,960	3.0%
<b><i>Willard Hall</i></b>						
Single Room Rate	\$7,808	\$8,042	3.0%	\$7,808	\$8,042	3.0%
<b><i>All Other University Housing</i></b>						
Single Room Rate	\$6,872	\$7,078	3.0%	\$6,872	\$7,078	3.0%
Double Room Rate	\$5,598	\$5,766	3.0%	\$5,598	\$5,766	3.0%
Triple Room Rate	\$5,330	\$5,490	3.0%	\$5,330	\$5,490	3.0%
Quad Room Rate	\$5,056	\$5,208	3.0%	\$5,056	\$5,208	3.0%
<b><i>University Apartments</i></b>						
Single Room Apartment Rate	\$8,316	\$8,566	3.0%	\$8,316	\$8,566	3.0%
Double Room Apartment Rate	\$6,844	\$7,050	3.0%	\$6,844	\$7,050	3.0%
Triple Room Apartment Rate	\$6,176	\$6,362	3.0%	\$6,176	\$6,362	3.0%
<b><i>Eagle Landing</i></b>						
Academic Year Contract - Double Room Rate	\$7,536	\$7,762	3.0%	\$7,536	\$7,762	3.0%



**University of Mary Washington  
2014-15 Tuition and Fees**

	<u>In-State Students</u>			<u>Out-of-State Students</u>		
	<u>2013-14</u>	<u>2014-15</u>	<u>% Chg.</u>	<u>2013-14</u>	<u>2014-15</u>	<u>% Chg.</u>
<b><i>University Meal Plans</i></b>						
275 Meal Block Plan (\$200 flex per semester)	\$4,950	\$5,148	4.0%	\$4,950	\$5,148	4.0%
225 Meal Block Plan (\$200 flex per semester)	\$3,674	\$3,820	4.0%	\$3,674	\$3,820	4.0%
150 Meal Block Plan (\$300 flex per semester)	\$3,524	\$3,664	4.0%	\$3,524	\$3,664	4.0%
90 Meal Block Plan (\$175 flex per semester)	\$1,980	\$2,060	4.0%	\$1,980	\$2,060	4.0%
60 Meal Block Plan (\$75 flex per semester)	\$1,144	\$1,190	4.0%	\$1,144	\$1,190	4.0%
<b><i>Summer Housing Rates</i></b>						
	<u>Summer 2014</u>			<u>Summer 2015</u>		
	<u>Session / Week / Day</u>			<u>Session / Week / Day</u>		<u>Inc.</u>
Eagle Landing						
Single	\$1,124	/ 225	/ 32	\$1,158	/ 232	/ 33
Double	\$917	/ 183	/ 26	\$945	/ 189	/ 27
University Apartments						
Single	\$1,317	/ 274	/ 40	\$1,357	/ 282	/ 41
Double	\$1,085	/ 219	/ 34	\$1,118	/ 224	/ 35
Triple	\$977	/ 196	/ 30	\$1,006	/ 201	/ 31
University Housing						
Single	\$1,050	/ 209	/ 29	\$1,082	/ 216	/ 31
Double	\$790	/ 158	/ 23	\$814	/ 163	/ 24
<b><i>Summer Meal Plan - 50 Meals per Session</i></b>		\$350		\$365		4.0%
<b><i>Summer Parking Decals</i></b>						
Five Week Session		\$35		\$35		0.0%
Eight Week Session		\$55		\$55		0.0%
Ten Week Session		\$70		\$70		0.0%

**University of Mary Washington**  
**2014-15 Tuition and Fees**

	In-State Students			Out-of-State Students		
	2013-14	2014-15	% Chg.	2013-14	2014-15	% Chg.
<b><i>Other Undergraduate/Graduate Fees and Charges</i></b>						
Undergraduate overload fee <i>(per credit hour over 18 semester hrs.)</i>	\$209	\$222	6.2%	\$744	\$774	4.0%
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>	\$335	\$335	0.0%	n/a	n/a	n/a
Application Fee	\$50	\$50	0.0%	\$50	\$50	0.0%
Tuition Deposit	\$250	\$250	0.0%	\$250	\$250	0.0%
Processing Fee	\$30	\$30	0.0%	\$30	\$30	0.0%
Orientation Fee	\$275	\$275	0.0%	\$275	\$275	0.0%
New Experiences for Students Transitioning (NEST)						
Service Program	\$275	\$300	9.1%	\$275	\$300	9.1%
Social Justice Program	\$300	\$300	0.0%	\$300	\$300	0.0%
Outdoor Adventure Program	\$300	\$300	0.0%	\$300	\$300	0.0%
Late Payment Fee	10% of unpaid balance up to \$250					
Returned Check Fee	\$50	\$50	0.0%	\$50	\$50	0.0%
Housing Fees						
Housing Deposit	\$250	\$250	0.0%	\$250	\$250	0.0%
Late Departure Fee (per day)	\$50	\$50	0.0%	\$50	\$50	0.0%
Lost Keys						
Residence Halls	\$75	\$75	0.0%	\$75	\$75	0.0%
Eagle Landing	\$125	\$125	0.0%	\$125	\$125	0.0%
UMW Apartments	\$150	\$150	0.0%	\$150	\$150	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)						
Beginners & Advanced Beginners	\$775	\$795	2.6%	\$775	\$795	2.6%
Intermediate & Advanced	\$840	\$855	1.8%	\$840	\$855	1.8%
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  
**2013-14**

Rank	IS Commuter*		OS Commuter*		Room & Board		IS Total		OS Total	
	1	W&M	\$15,463	UVA	\$39,844	VSU	\$10,008	W&M	\$25,279	UVA
2	VMI	\$14,404	W&M	\$38,440	UVA-W	\$9,990	VMI	\$22,492	W&M	\$48,256
3	UVA	\$12,458	VMI	\$35,392	CNU	\$9,958	UVA	\$22,175	VMI	\$43,480
4	VCU	\$12,002	VCU	\$29,473	W&M	\$9,816	VCU	\$21,084	VCU	\$38,556
5	VT	\$11,455	GMU	\$28,592	UVA	\$9,717	CNU	\$21,050	GMU	\$37,582
6	LU	\$11,340	VT	\$27,211	<b>UMW</b>	<b>\$9,122</b>	LU	\$20,216	VT	\$34,861
7	CNU	\$11,092	ODU	\$24,480	VCU	\$9,082	VT	\$19,105	UVA-W	\$33,555
8	GMU	\$9,908	LU	\$24,211	GMU	\$8,990	GMU	\$18,898	ODU	\$33,392
9	<b>UMW</b>	<b>\$9,660</b>	JMU	\$23,654	ODU	\$8,912	<b>UMW</b>	<b>\$18,782</b>	LU	\$33,086
10	JMU	\$9,176	UVA-W	\$23,565	LU	\$8,876	UVA-W	\$18,499	JMU	\$32,527
11	RU	\$8,976	<b>UMW</b>	<b>\$22,530</b>	JMU	\$8,873	JMU	\$18,049	<b>UMW</b>	<b>\$31,652</b>
12	ODU	\$8,820	RU	\$21,141	NSU	\$8,374	VSU	\$17,792	CNU	\$30,950
13	UVA-W	\$8,509	CNU	\$20,992	RU	\$8,156	ODU	\$17,732	RU	\$29,297
14	VSU	\$7,784	NSU	\$20,696	VMI	\$8,088	RU	\$17,132	NSU	\$29,070
15	NSU	\$7,226	VSU	\$17,192	VT	\$7,650	NSU	\$15,600	VSU	\$27,200

\*Includes tuition and all mandatory fees.

For William and Mary, the in-state tuition and fee amount reflects charges for freshmen and transfer students. Continuing students will pay \$13,868.

For VCU, the in-state tuition and fee amount reflects charges for first-time freshmen and transfer students. Continuing students will pay \$10,299.

Source: SCHEV 2013 Tuition and Fee Report, July 2013

# University of Mary Washington 2014-15 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.

**NEST Fee:** A fee for students participating in the optional NEST (New Experiences for Students Transitioning) orientation program. NEST options include Service, Social Justice and Outdoor Adventure programs.

**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.