



Proposed
2010-11 University Budget Plan
and
Tuition and Fees

University of Mary Washington

Board of Visitors

May 7, 2010

We are seeking the Board's approval of the University Budget Plan and tuition and fees for 2010-11.

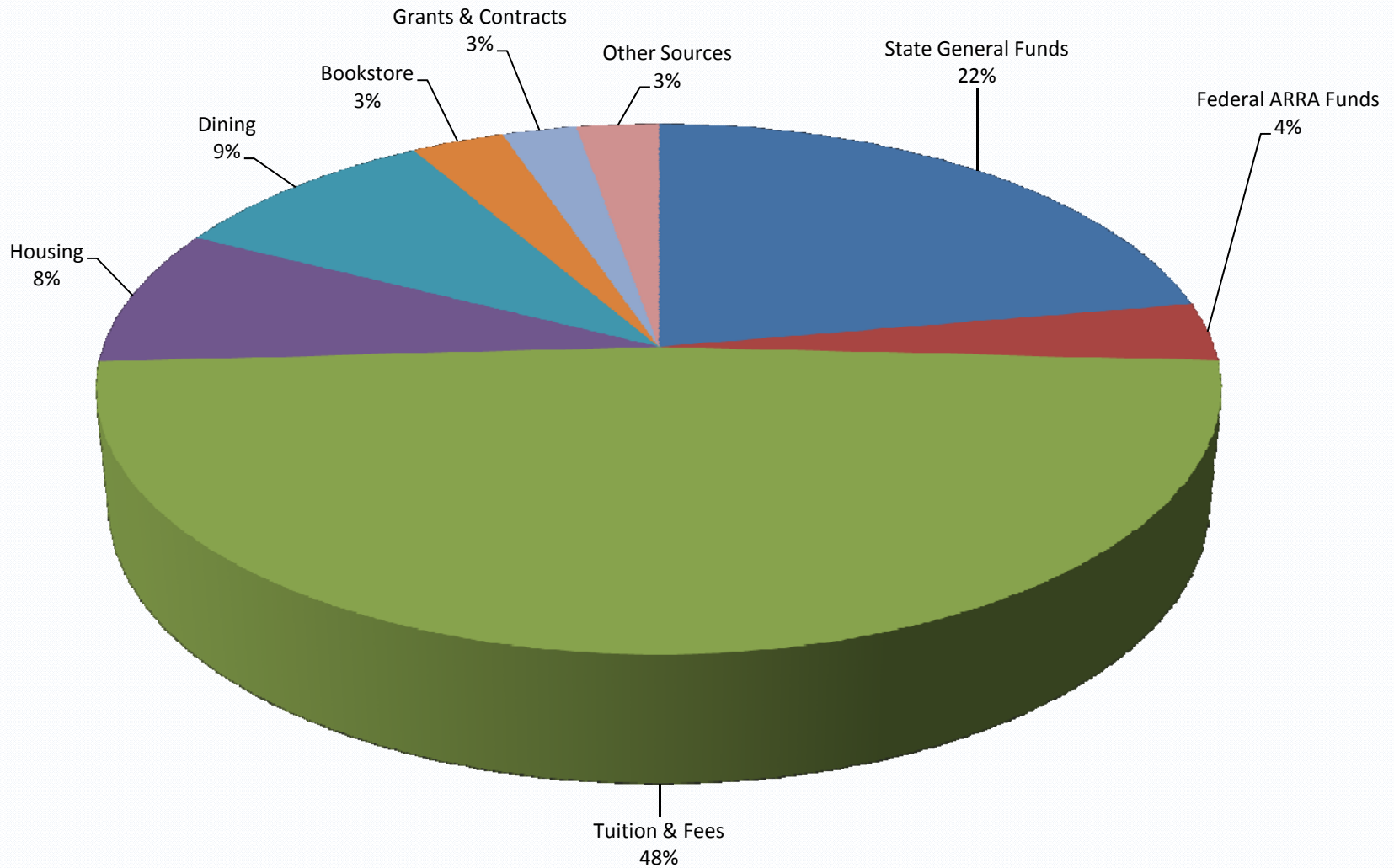
- The proposed budget covers the period from July 1, 2010 to June 30, 2011.
- The proposed tuition and fee rates will apply to the Fall 2010, Spring 2011 and Summer 2011 terms.

The budget is balanced. Revenue and budgeted uses are expected to total \$96.0 million in 2010-11.

	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	\$ 68,526,136	\$ 71,222,501	3.9%
Total Sources	\$ 91,267,482	\$ 96,021,670	5.2%
Uses			
Instruction	\$ 28,271,306	\$ 29,621,417	4.8%
Research / 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	\$ 91,267,482	\$ 96,021,670	5.2%
Budget Balance	\$ -	\$ -	

* Includes both direct appropriations and estimated central transfers for 2010-11.

About 22% of UMW's revenue is from state general funds...



State general funds and federal ARRA allocation. . .

- No additional general fund cuts in 2010-11 budget
 - \$5.7 million in reductions to date
 - Increases to \$8.0+ million in FY12 or 35% cut
- Federal ARRA funds increase in FY11
 - \$3.4 million
 - No ARRA funds in FY12

Tuition and Fee revenue. . .

- No state restrictions on E&G tuition and fee rates
- Tuition and fee rates assumed in the 2010-11 budget plan
 - 9% increase for in-state students
 - 3.4% increase for out-of-state students

University housing and meal plans. . .

- No state restrictions on housing or meal plan rates
- Housing and dining rates reflected in the 2010-11 budget plan were approved by the Board at its meeting on February 19, 2010:
 - 9% increase for University housing
 - 5% increase for meal plans

Projected enrollment. . .

- Total headcount enrollment projected to be about 160 above the current year
 - About 5,500 students on both campuses
- Mix of students by residency continues to change
 - Anticipated decline of about 150 out-of-state students
 - Replaced with additional in-state students
 - Revenue neutral in total tuition and fee revenue

Turning to the 2010-11 expenditure budget . . .

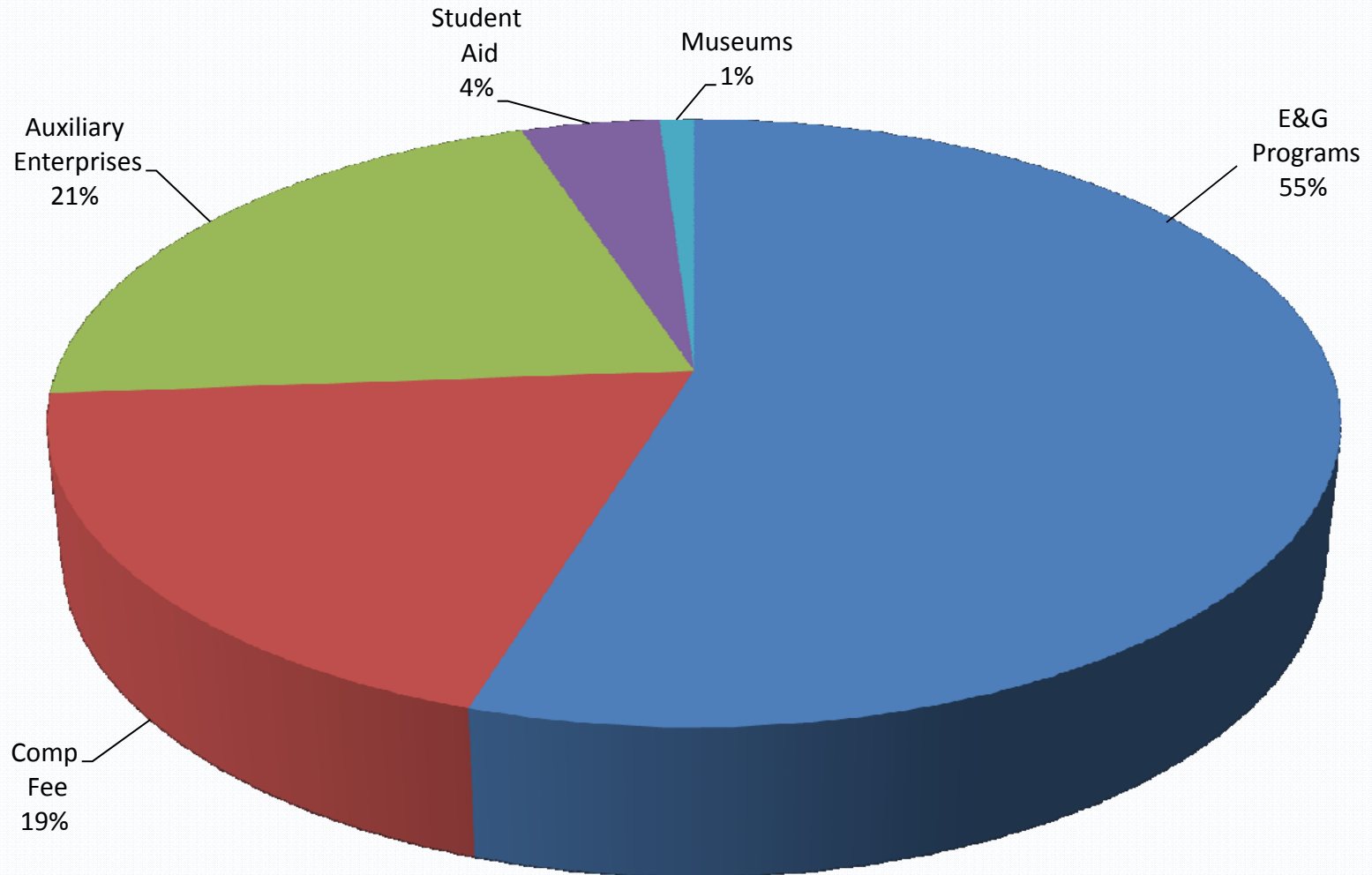
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Total Uses	\$ 91,267,482	\$ 96,021,670	5.2%
Budget Balance	\$ -	\$ -	

* Includes both direct appropriations and estimated central transfers for 2010-11.

The operating budget is comprised of five separate programs . . .

FY 2010-11 Sources	Educational & General Programs	Auxiliary Enterprises	Comp Fee	Student Financial Assistance	Museums & Cultural Services	Total University
State General Fund						
Direct Appropriations	\$ 18,987,067	\$ -	\$ -	\$ 1,468,705	\$ 664,969	\$ 21,120,741
Central Transfers	217,271	-	-	55,000	-	272,271
Total General Fund	\$ 19,204,338	\$ -	\$ -	\$ 1,523,705	\$ 664,969	\$ 21,393,012
Federal ARRA Funds	\$ 3,406,157	\$ -	\$ -	\$ -	\$ -	\$ 3,406,157
Nongeneral Funds						
Student Tuition and Fees	\$ 28,867,515	\$ -	\$ 17,486,000	\$ -	\$ -	\$ 46,353,515
Grants and Contracts	-	-	-	2,405,000	-	2,405,000
Sales and Services	-	19,825,400	-	-	-	19,825,400
Other Revenues	1,113,837	429,000	789,749	-	306,000	2,638,586
Total Nongeneral Funds	\$ 29,981,352	\$ 20,254,400	\$ 18,275,749	\$ 2,405,000	\$ 306,000	\$ 71,222,501
Total University Sources	\$ 52,591,847	\$ 20,254,400	\$ 18,275,749	\$ 3,928,705	\$ 970,969	\$ 96,021,670
FY 2010-11 Uses						
Instruction	\$ 29,057,883	\$ -	\$ 563,534	\$ -	\$ -	\$ 29,621,417
Research / Public Service	366,375	-	287,074	-	-	653,449
Academic Support	7,691,765	-	1,079,164	-	-	8,770,929
Student Services	3,917,967	-	1,321,960	-	-	5,239,927
Institutional Support	5,520,580	-	1,197,460	-	-	6,718,040
Operation and Maintenance of Plant	4,765,277	-	1,209,521	-	-	5,974,798
Scholarships and Fellowships	-	-	1,447,500	3,928,705	-	5,376,205
Auxiliary Enterprises						
University Housing	-	2,902,969	903,000	-	-	3,805,969
Dining Services	-	6,394,962	466,094	-	-	6,861,056
Bookstore	-	2,908,684	-	-	-	2,908,684
Other Services	-	8,047,785	9,743,277	-	-	17,791,062
Museums and Cultural Services						
Belmont	-	-	28,575	-	729,570	758,145
James Monroe Museum & Library	-	-	28,590	-	241,399	269,989
Contingencies						
HEETF	632,000	-	-	-	-	632,000
Maintenance Reserve	640,000	-	-	-	-	640,000
Total University Uses	\$ 52,591,847	\$ 20,254,400	\$ 18,275,749	\$ 3,928,705	\$ 970,969	\$ 96,021,670

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



Educational and General Programs (E&G)

- Core instructional programs and related support services.
- Primary sources of support come from general fund appropriations, federal ARRA funds and student tuition and fees.
- \$52.6 million budget for 2010-11
 - 6.0% increase over 2009-10 (\$2.9 million)

Key features of the proposed 2010-11 E&G budget include...

- New Dean for the College of Arts and Sciences
- New Dean for College of Education (reallocations)
- Initial operating support for the Dahlgren Campus
- Increase of \$100,000 in base operating for Library
- Self-Study director for SACs accreditation
- Permanent director of student counseling services
- Contingency funding
 - \$632,000 for HEETF
 - \$640,000 for maintenance reserve

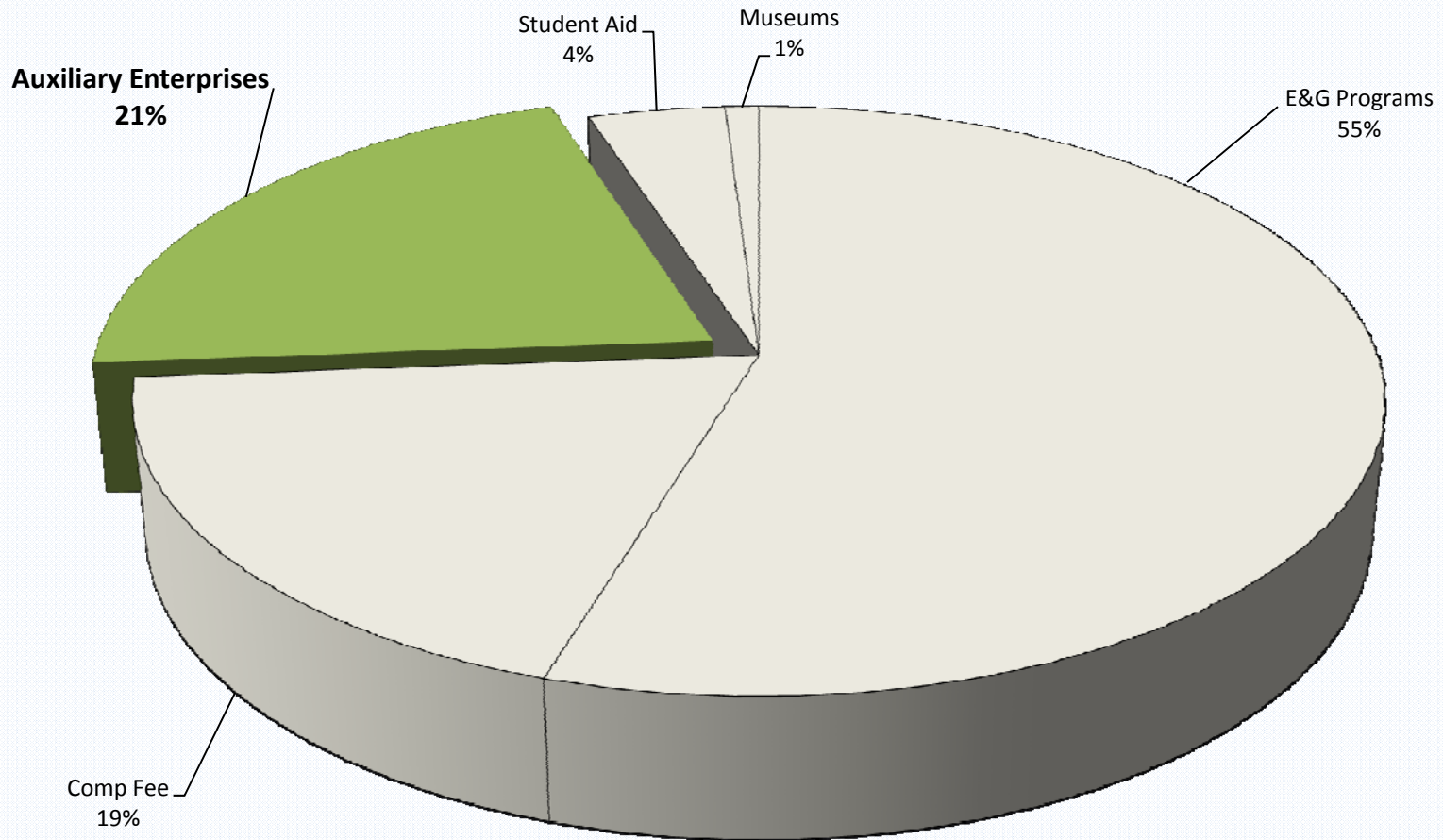
The E&G budget will also address a number of unavoidable cost increases. . .

- Replace state funding for Eminent Scholars program
- Additional payment to state Treasury for debt costs associated with out-of-state students
- Utilities, licenses, lease costs, and contracts
- Contingency funding for 3% faculty and staff bonus
 - Effective December 2010
 - Contingent upon achieving state year-end revenue target

Auxiliary Enterprises . . .

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Nongeneral Funds						
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Grants and Contracts	-	-	-	2,405,000	-	2,405,000
Sales and Services	-	19,825,400	-	-	-	19,825,400
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The second largest piece of the operating budget is auxiliary enterprises. . .



Auxiliary Enterprise Programs

- Self-supporting services provided to students, faculty and staff
 - Dining, University housing, bookstore, recreation, intercollegiate athletics, student life operations, student activities, network and communication services
- Receives no general fund (state taxpayer) support
- \$20.3 million budgeted for 2010-11
 - 2.5% decrease over current budget (-\$0.5 million)

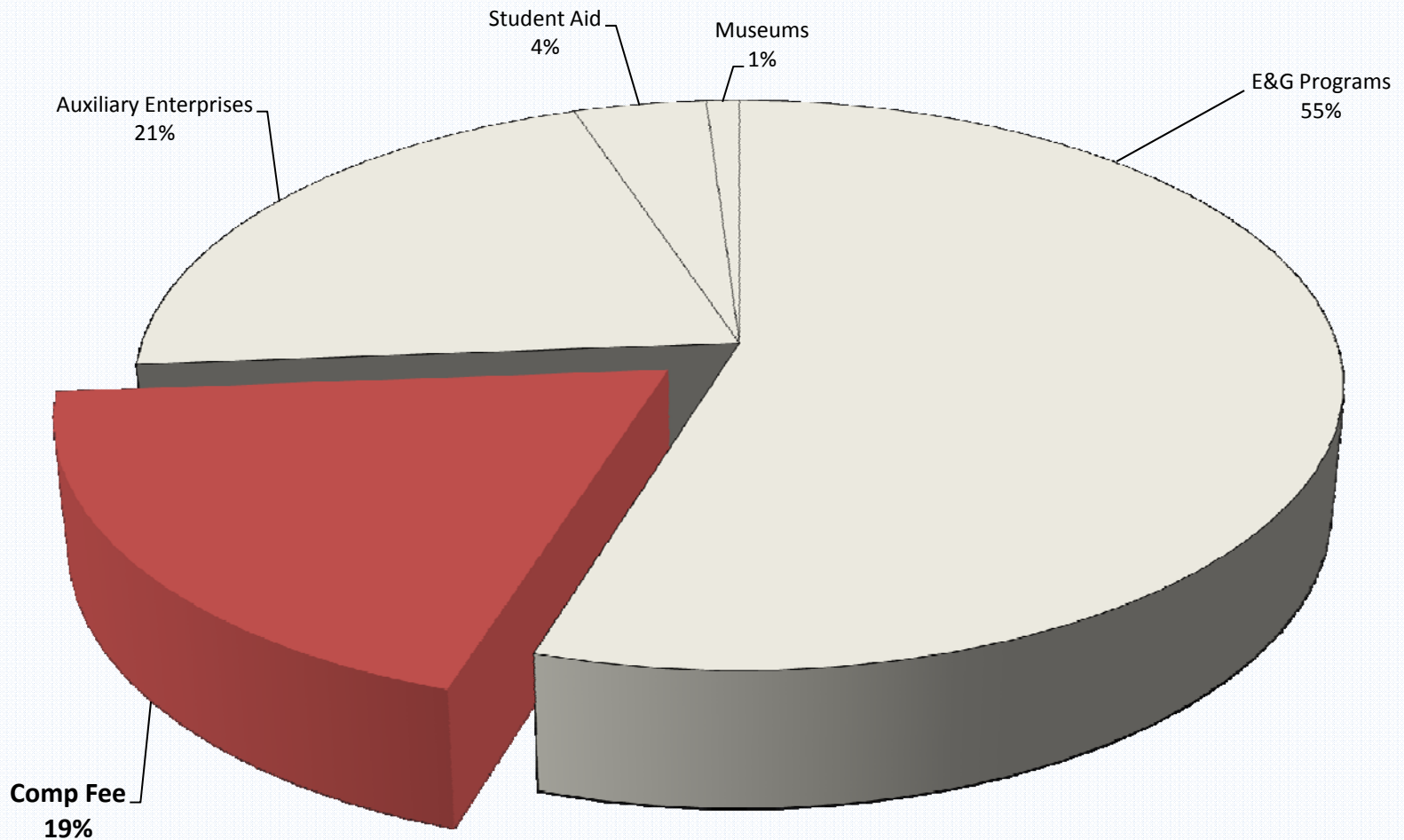
Key features of the proposed 2010-11 budget for auxiliary enterprises include...

- Incorporating additional housing at Eagle Landing
- Closing of Mason and Randolph Halls for renovation
- Enhanced dining program
- Decline in Bookstore revenue
- Elimination of Health Services fee for commuters
- Contingency funding for 3% faculty and staff bonus

Comprehensive Fee . . .

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



Comprehensive Fee

- Mandatory fee charged to all students
- Two components of the Comprehensive Fee (proposed FY11 rate of \$3,878)
 - E&G is about 39% or \$1,516 (full-time, academic year)
 - Auxiliary is 61% or \$2,362 (full-time, academic year)
- \$18.3 million budget for 2010-11

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

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

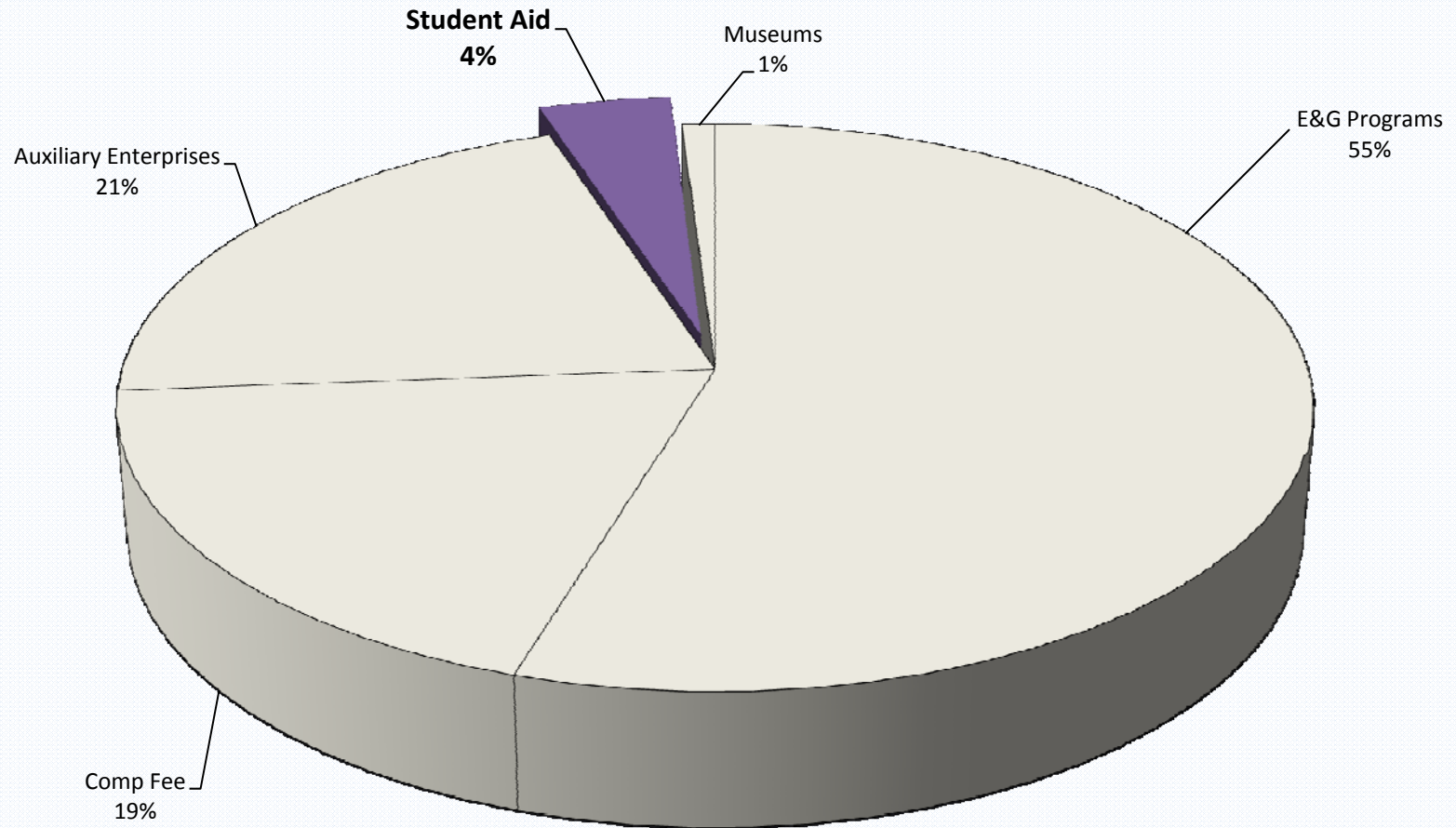
Key features of the proposed 2010-11 Comp Fee budget include...

- Funding for Diversity Scholarships
 - Second year funding of \$215,000
 - \$860,000 total funding by 2012-13
- Need-based aid for in-state undergraduate students
 - Increase of \$150,000
 - On top of recent additions of \$25,000 in FY10 and \$145,000 in FY09
- Scholarships for Excellence
 - Continuation funding of \$797,500

Student Financial Assistance . . .

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About 4% of the budget is for student financial assistance programs...



Student Financial Assistance

- Provides support for scholarships and grants awarded to students
- Key programs include:
 - Virginia Student Financial Assistance Program
 - Federal Pell Grant Program
 - Supplemental Educational Opportunity Grants (SEOG)
 - College Scholarship Assistance Program (federal and state)
 - ACG and SMART Grants (federal)
 - Work study and student employment
- \$3.9 million budget for 2010-11
 - Excludes an estimated \$8 million in direct lending programs

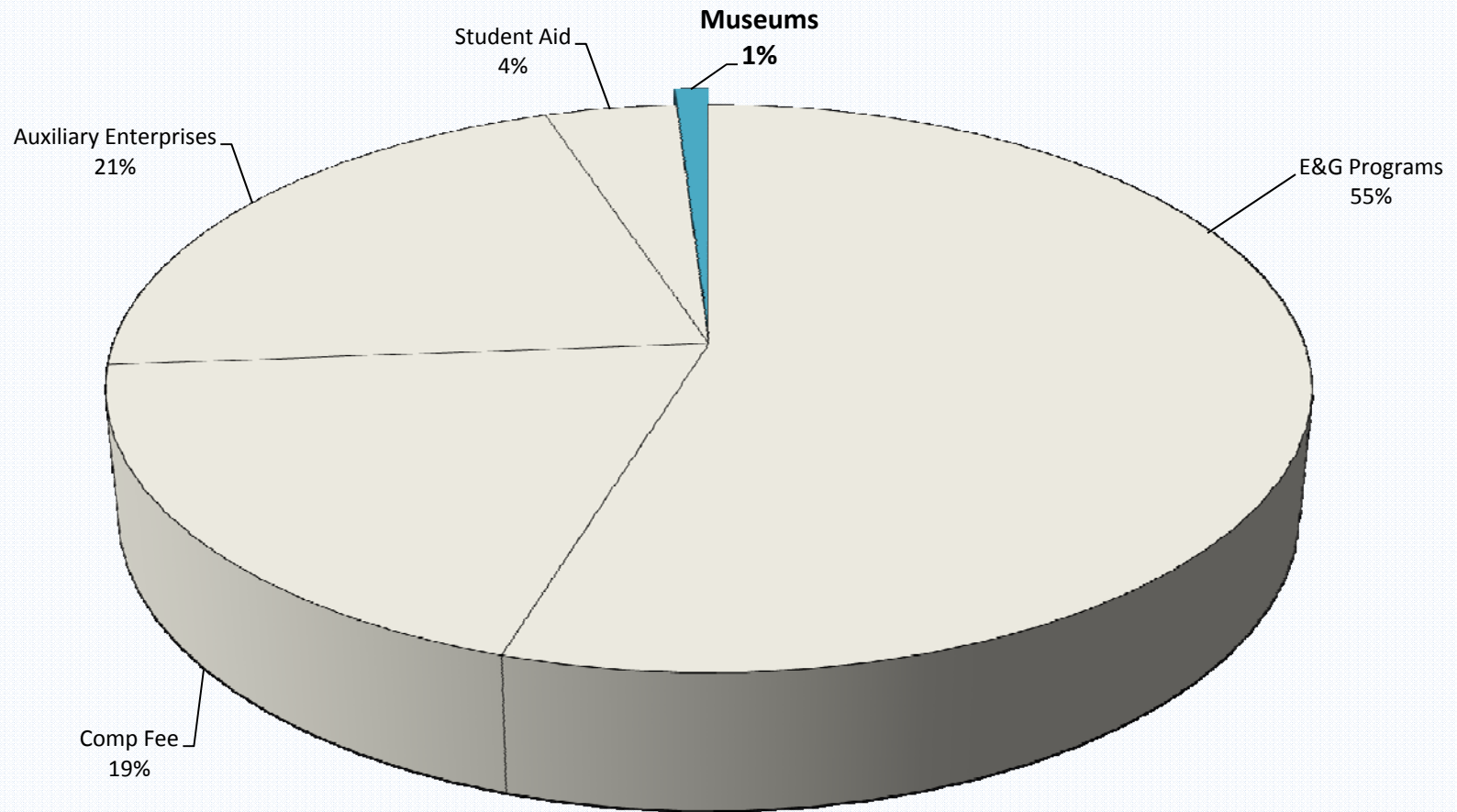
Key features of the budget for student financial assistance include...

- No increase in state funding for need-based aid for in-state undergraduate students
 - Total program funding of \$1.5 million
- Increase in the maximum Pell Grant award of \$200
 - \$5,350 in FY10 to \$5,550 in FY11
- No increases in other federal programs

Museums and Cultural Services . . .

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



Museums and Cultural Services

- Gari Melchers - Belmont
- James Monroe Museum and Law Library
- Revenue sources
 - State general funds
 - Ticket sales
 - Gift shop revenue
 - Facilities rental
 - Private gifts
- No changes are reflected in the 2010-11 budget

Proposed 2010-11 Tuition and Fees

2010-11 proposed tuition increases include...

- In-state tuition: 9% increase
 - \$330 increase for the academic year
- Out-of-state tuition: 2.1% increase
 - \$330 increase for the academic year
- Graduate student tuition and fees
 - 9.0% increase for in-state students
 - 3.1% increase for out-of-state students
- Comprehensive Fee: 9% increase
 - \$320 increase for the academic year

Other rate changes previously approved by the Board in February and April. . .

- University housing: 9% increase
- University apartments: 9% increase
- Established new rates for Eagle Landing
 - \$5,950 for a 9-month double room
 - \$6,950 for a 12-month double room
- University board plans: 5%

2010-11 recommended tuition and fee rates...

<i>Residential Students</i>	In-State Students			Out-of-State Students		
	2009-10	2010-11	% Chg.	2009-10	2010-11	% Chg.
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	\$14,674	\$15,874	8.2%	\$26,402	\$27,602	4.5%

(1) Based on double-occupancy room.

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

<i>Commuting Students</i>	In-State Students			Out-of-State Students		
	2009-10	2010-11	% Chg.	2009-10	2010-11	% Chg.
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	\$7,212	\$7,862	9.0%	\$18,940	\$19,590	3.4%

Board approved rate increases for 2010-11...

Board Approved	I/S	O/S	Room	Total	
	<u>T&F</u>	<u>T&F</u>	<u>& Board</u>	<u>I/S</u>	<u>O/S</u>
VCU	23.9%	5.8%	2.3%	12.2%	4.8%
CNU	12.1%	11.1%	3.3%	7.5%	8.3%
VT	9.9%	6.1%	8.0%	9.1%	6.5%
UVA	9.9%	6.0%	4.4%	7.4%	5.7%
LU	9.1%	12.7%	6.8%	8.0%	11.0%
JMU	8.5%	6.4%	4.3%	6.3%	5.8%
GMU	8.2%	6.0%	3.1%	5.7%	5.3%
VSU	6.4%	4.3%	1.3%	3.5%	3.2%
ODU	5.3%	7.0%	5.0%	5.2%	6.4%
Proposed					
UMW	9.0%	3.4%	7.3%	8.2%	4.5%

UMW's 2010-11 relative position to other Virginia institutions is expected to be consistent with 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
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.

UMW Recommended 2010-11 Rates:

<u>\$7,862</u>	<u>\$19,590</u>	<u>\$8,012</u>	<u>\$15,874</u>	<u>\$27,602</u>
9.0% inc.	3.4% inc.	7.4% inc.	8.2% inc.	4.5% inc.

2009-10 tuition and fees for competitor schools...

	In-State	Out-of-State
University of Mary Washington	\$7,212	\$18,940
James Madison University	\$7,244	\$19,376
College of William and Mary	\$11,100	\$31,264
University of Virginia	\$9,672	\$31,672
George Mason University	\$8,024	\$23,120
Christopher Newport University	\$8,250	\$16,192
Virginia Commonwealth University	\$7,117	\$20,749
University of Richmond	\$40,010	\$40,010
Longwood University	\$9,030	\$18,330
Washington and Lee University	\$38,877	\$38,877
Roanoke College	\$29,584	\$29,584
Randolph-Macon College	\$29,182	\$29,182
American University	\$34,973	\$34,973
University of Delaware	\$9,486	\$23,186
George Washington University	\$41,655	\$41,655
Dickinson College	\$40,139	\$40,139
Boston College	\$39,130	\$39,130
Elon University	\$25,489	\$25,489
University of Vermont	\$13,554	\$31,410
University of North Carolina (Chapel Hill)	\$5,625	\$23,513
University of Maryland	\$8,053	\$23,990
Wake Forest University	\$38,622	\$38,622
Georgetown University	\$39,036	\$39,036
Loyola College of Maryland	\$37,610	\$37,610
Gettysburg College	\$39,200	\$39,200

In conclusion, we are asking the Board of Visitors to approve the University Budget Plan and 2010-11 tuition and fee rates as presented in the meeting materials.