



2019-20
University Budget Plan
and
Tuition and Fees

UMW Board of Visitors
April 12, 2019

**University of Mary Washington
2019-20 University Budget Plan
Tuition and Fees**

Table of Contents

2019-20 University Budget Plan

Table A - Total Sources and Uses	I- 1
Overview	I- 2
2019-20 Tuition and Fee Rates	I- 3
2019 General Assembly Actions	I- 5
Ten-Year History of State General Fund Support	I- 6
Budgeted Student Enrollment	I- 7
2019-20 Budget by Fund Source and Key Priorities	I- 7
Ten-Year History of Fall Headcount Enrollment by Residency	I- 8
Table B - Sources and Uses by Fund Group	I- 9
2018-19 and 2019-20 Revenue Budget Composition	I-10
2018-19 and 2019-20 Expenditure Budget Composition	I-11
Table C - Summary of 2019-20 Budget Changes	I-16

2019-20 Tuition and Fees

Tuition Rates by Student Classification and Residency	II- 1
University Housing Rates	II- 2
Meal Plan Rates	II- 2
Summer Housing, Meal Plans, and Parking	II- 3
Other Fees and Charges	II- 4
2018-19 T&F Comparisons to Other Virginia Institutions	II- 5

Glossary of Terms

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

TABLE A

**University of Mary Washington
2019-20 University Budget Plan**

	2018-19 Revised Budget	2019-20 Budget Plan	Change Over 2018-19
Sources			
State General Funds*			
Educational and General Programs	\$ 27,647,038	\$ 29,865,353	8.0%
Student Financial Assistance	3,428,981	3,738,262	9.0%
Belmont / James Monroe Museum	755,065	755,065	0.0%
Dahlgren Campus	1,250,000	1,250,000	0.0%
Total General Funds	<u>\$ 33,081,084</u>	<u>\$ 35,608,680</u>	7.6%
Nongeneral Funds			
Tuition	\$ 46,624,200	\$ 45,602,200	-2.2%
Fees	16,854,000	18,860,000	11.9%
Sales and Services			
Housing	10,731,000	9,731,000	-9.3%
Dining	11,036,000	10,636,000	-3.6%
Bookstore	2,010,000	-	-100.0%
Grants and Contracts	4,130,000	4,261,800	3.2%
Other Sources	4,450,951	4,750,951	6.7%
Total Nongeneral Funds	<u>\$ 95,836,151</u>	<u>\$ 93,841,951</u>	-2.1%
Total Sources	<u><u>\$ 128,917,235</u></u>	<u><u>\$ 129,450,631</u></u>	0.4%
Uses			
Instruction	\$ 32,801,489	\$ 33,032,216	0.7%
Research and Public Service	1,107,633	1,122,633	1.4%
Academic Support	9,591,962	9,150,082	-4.6%
Student Services	8,014,967	8,376,914	4.5%
Institutional Support	11,551,961	10,491,435	-9.2%
Operation and Maintenance of Plant	5,786,444	5,777,491	-0.2%
Scholarships and Fellowships	15,058,981	17,600,062	16.9%
University Housing	10,731,000	9,731,000	-9.3%
Dining	11,036,000	10,636,000	-3.6%
Bookstore	2,010,000	-	-100.0%
Auxiliary Programs	18,411,448	20,717,448	12.5%
Museums & Cultural Services	1,115,350	1,115,350	0.0%
Higher Education Centers	1,700,000	1,700,000	0.0%
Total Uses	<u><u>\$ 128,917,235</u></u>	<u><u>\$ 129,450,631</u></u>	0.4%
Budget Balance	<u><u>\$ -</u></u>	<u><u>\$ -</u></u>	

* Includes both direct appropriations and estimated central transfers.

University of Mary Washington 2019-20 University Budget Plan

Highlights

Overview

- ❑ The University of Mary Washington's 2019-20 budget plan was prepared within a framework defined by actions of the 2019 General Assembly, tuition and fee rates, student enrollment, unavoidable cost increases and commitments, and key priorities identified by the President and university leadership.
- ❑ The development of the university's 2019-20 budget and tuition and fee rates was informed by an engagement with Huron in the fall of 2018. As a part of this engagement, the university has identified strategies to improve financial liquidity, assess its pricing structure, enhance transparency between student charges, programs and services, and develop a Student Success Plan focusing on recruiting, enrolling, retaining and graduating students.

With regard to the university's budget and tuition and fee pricing, strategies identified by the university include:

- Collapsing the E&G Comprehensive Fee with tuition, which will simplify the university's pricing structure and improve transparency.
- Developing a multi-year strategy to more closely align room and board charges to the full cost of delivery of these auxiliary services.
- Adjusting the Auxiliary Comprehensive Fee to reduce the funding subsidization provided through housing and dining revenue streams of various auxiliary programs, such as athletics, recreation, student clubs, and auxiliary facilities operation and debt service.

The university's budget and tuition and fee rates as presented in this document reflect the initial implementation of the strategies summarized above. Full implementation of the recommendations will be a multi-year process.

The university also compared various pricing models, including flat-rate tuition (currently in place at UMW), a guarantee model, which locks-in selected charges over a four-year period thereby offering some level of pricing predictability, and a per credit hour model, which charges students for each credit hour (as opposed to a flat rate at certain credit hour thresholds). Tuition and fee structure options will continue to be evaluated for implementation at a later date.

- ❑ Table A on page I-1 summarizes projected university sources and uses for 2019-20.
 - The budget is balanced with projected sources and uses estimated at \$129.5 million.
 - The 2019-20 budget represents a 0.4% increase over the current budget.

Tuition and Fees

- The 2019-20 budget plan is based on the tuition, fees, housing and dining rates as presented on pages II-1 through II-4. The following is a summary of the total tuition and fee charges for 2019-20:

Full-Time Undergraduates – University Housing*

	<u>2018-19</u>	<u>2019-20</u>	<u>Change</u>
In-State	\$23,384	\$23,940	2.4%
Out-of-State	\$39,318	\$40,366	2.7%

Full-Time Undergraduates – Commuters*

	<u>2018-19</u>	<u>2019-20</u>	<u>Change</u>
In-State	\$12,654	\$13,210	4.4%
Out-of-State	\$28,588	\$29,636	3.7%

Key Considerations in 2019-20 Tuition and Fee Rate Setting

There were two key considerations in the development of the 2019-20 tuition and fee rates.

The first was the funding of an In-State Undergraduate Affordability initiative by the 2019 General Assembly. In total, \$52.5 million has been set aside for allocation to those Virginia public institutions that maintain tuition and mandatory E&G fee charges for in-state undergraduate students at 2018-19 levels. Allocations from the pool vary by institution. For UMW, the allocation is \$957,000 and is the approximate equivalent of a 3% rate increase for in-state undergraduate students. Funding is being held centrally by the state and will be allocated to the institutions following a certification by the State Council of Higher Education for Virginia (SCHEV) that the institution has met the tuition freeze requirements. Institutions that elect to increase tuition and mandatory E&G fees for in-state undergraduate students must communicate the decision to the Chairs of the House and Senate Finance Committees by Board Resolution by August 1, 2019.

As presented, the 2019-20 tuition and mandatory tuition rates for in-state undergraduate students are held flat at the 2018-19 levels, which will make UMW eligible for a general fund allocation of \$957,000 from the state's Affordability pool. The additional \$957,000 in general fund support has been reflected in the 2019-20 operating budget plan.

The second key consideration centers on a realignment of the university's tuition and fee rate structure, including room and board charges. Currently, the housing and dining programs generate revenues in excess of those required to support current operational expenses. Over time, the excess revenues have been redirected to support other auxiliary programs, such as intercollegiate athletics, student recreation, and operating and debt service costs for auxiliary facilities, including the University Center, the Anderson Center, the Fitness Center, and other athletic and student recreation fields and facilities. This practice has resulted in an over-pricing of university housing and dining programs and a lack of transparency between student charges and program costs.

Further, the university has not set aside funds within the housing and dining operating budgets to address facilities maintenance, renewal and replacement. Part of the long-term funding strategy for housing and dining will be to budget for a renewal and replacement fund, which will further reduce the “excess” revenues in these areas.

In order to more closely align various student charges with the associated programs and services, the university has initiated a multi-year phase-in of rate restructuring that would reduce the auxiliary program subsidies funded through housing and dining and move these costs to the Auxiliary Comprehensive Fee. The 2019-20 budget and tuition and fee rates reflect the first year of this phase-in, which will result in no increases in university housing and dining rates offset with a 14% increase in the Auxiliary Comprehensive Fee. Even with a significant increase in the Auxiliary Comprehensive Fee, the total cost increase for a full-time undergraduate student living on-campus is estimated at 2.4% for in-state students and 2.7% for out-of-state students.

The 2019-20 tuition and fee rates also reflect the combining of the E&G Comprehensive Fee with tuition. Adoption of this recommendation has no impact on student costs nor to the bottom-line of the university’s operating budget. From a technical and reporting standpoint, the E&G Comprehensive Fee is viewed by state and national reporting entities to be the same as tuition. The recommended tuition and E&G Comprehensive Fee change is summarized below:

	Resident Undergraduate		
	2018-19	2019-20	Change
Tuition	\$6,302	\$8,678	\$2,376
E&G Comp Fee	2,376	-	(2,376)
Total	\$8,678	\$8,678	-

For comparative purposes on the tuition and fee schedules, the E&G Comprehensive Fee has been included in the tuition line for both 2018-19 and 2019-20.

UMW Foundation – Residence Halls: The student residence facilities owned by the UMW Foundation include Eagle Landing and the William Street Apartments. Although the university manages these residence halls, the associated revenue from room rents flows through the Foundation. Revenue from room rents is projected to total \$8.4 million in 2019-20, with \$5.2 million from Eagle Landing and \$3.2 million from the Apartments.

Eagle Landing and the Apartments are financed through debt held by the Foundation. Unlike debt financing held by the university, which reflects level debt service costs from year-to-year, the Foundation’s debt for their housing facilities assumes an annual escalation of debt service. The debt was structured in this fashion in order to keep room rents as attractive as possible at the beginning stages of the project (primarily for Eagle Landing) and then increase rents over time as the project matured. The financial pro forma for the debt assumes a 3% annual escalation in room rents.

For 2019-20, room rates are recommended to increase by 2% at Eagle Landing and 5% at the Apartments. The total incremental revenue generated by these variable rate increases will be at a level sufficient to meet the associated debt financing obligations of the Foundation.

Comparisons with other Virginia public institutions: A comparison of 2018-19 tuition and fee charges among Virginia’s public four-year institutions is presented on page II-5. Of the 15 public

universities in Virginia, UMW's total in-state tuition and fee charges for commuter students and for in-state residential students, which includes room and board, are ranked 8th (#1 being the highest charges; #15 the lowest).

Similarly, UMW's 2018-19 tuition and fee charges for out-of-state commuter students and for out-of-state residential students are ranked 9th out of the 15 Virginia institutions.

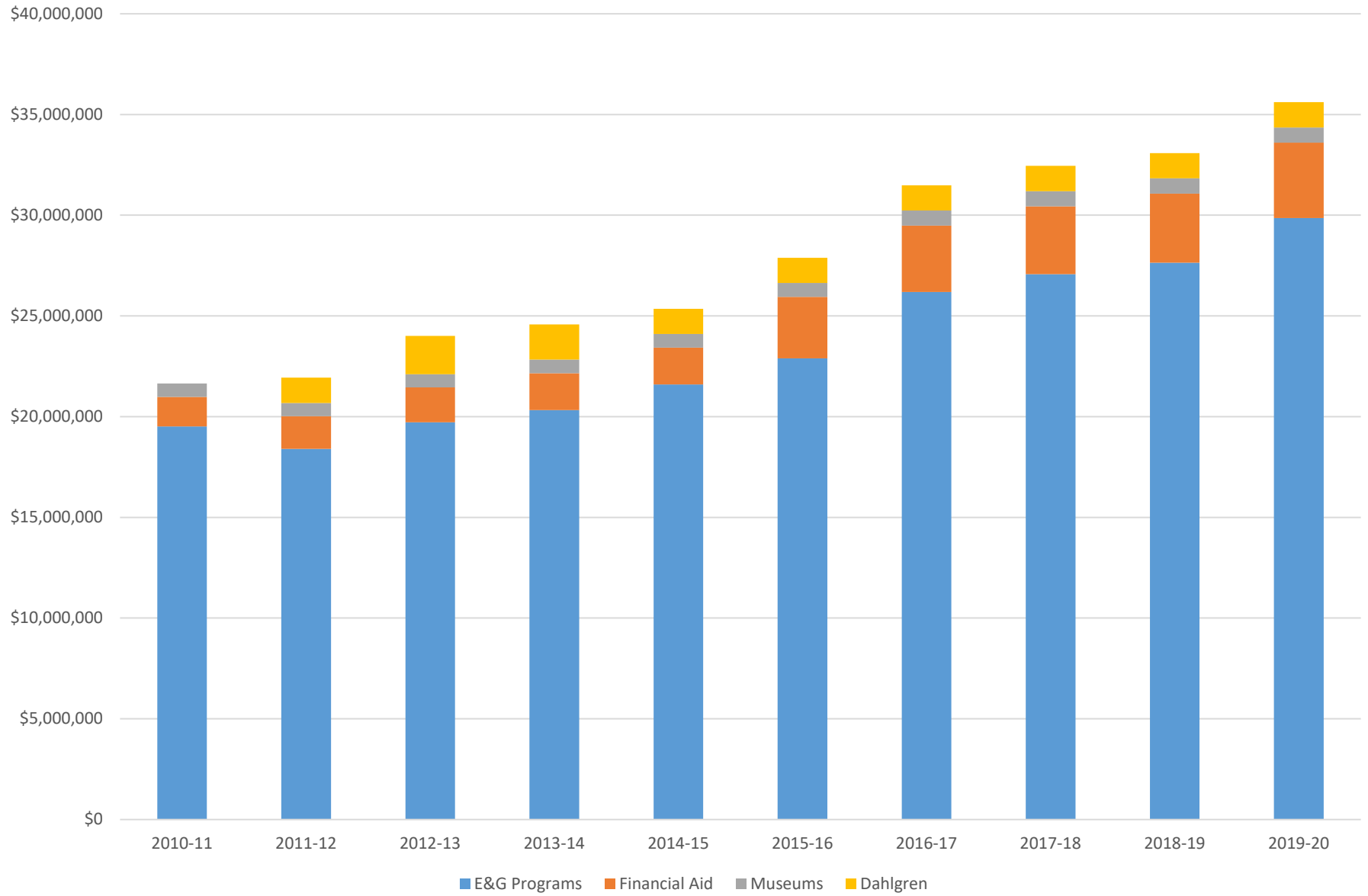
The detailed tuition and fee schedules for 2019-20 are presented on pages II-1 through II-4.

2019 General Assembly

- The university's 2019-20 spending plan incorporates the state budget adopted in the 2019 session of the General Assembly on February 23, 2019. Key actions taken by the General Assembly affecting the university's operating budget include:
 - Additional general fund support of \$867,579 to partially offset the cost of salary increases for faculty and classified staff effective June 10, 2019. The salary adjustments include a 3% across-the-board increase for teaching and administrative faculty and a 2.75% across-the-board increase for classified staff. In addition, classified staff may be eligible for a 2.25% merit increase, also effective on June 10, 2019.
 - A reduction in general fund support estimated at \$340,000 to reflect savings associated with a health insurance premium holiday for two pay periods in 2019-20.
 - An allocation of \$957,000 in general funds from the state's Undergraduate Affordability pool in exchange for holding tuition and mandatory E&G fee charges for in-state undergraduate students constant with 2018-19 rates.
 - Additional general fund support of \$375,000 to support UMW's Career and Professional Development Center
 - Additional general funds of \$338,500 to fund a statewide initiative to support increased degree production in data science and technology, science and engineering, healthcare and education programs.
 - Additional general funds of \$50,000 to offset increased operating costs for new facilities coming on-line.
 - Additional general fund support of \$309,281 through the state's financial aid program. The funding increase brings total support for this program to \$3.7 million.
 - No change to UMW's annual allocation from the Higher Education Equipment Trust Fund (HEETF), which is currently \$655,746.
 - Additional general fund support of \$12,629 to partially offset increases in state charges for technology (VITA) and the state's finance, budget, personnel and payroll systems.

A ten-year history of state general fund support for E&G Programs, Student Financial Assistance, the Museums, and the Dahlgren Campus is presented on page I-6.

University of Mary Washington Ten-Year History of State General Fund Support



Enrollment

- ❑ A summary of the headcount enrollment assumptions used in the 2019-20 budget plan is presented below.

A ten-year history of fall headcount enrollment by residency is presented on page I-8.

Headcount	Fall 2018			Budget Plan-Fall 2019		
	I/S	O/S	Total	I/S	O/S	Total
Undergraduate	4,029	381	4,410	4,005	375	4,380
Graduate	309	8	317	290	5	295
Total	4,338	389	4,727	4,295	380	4,675

Includes Fredericksburg and Stafford campuses

Budget Plan by Fund Source and Key Priorities

- ❑ **Revenues and Expenditures:** Budgeted revenue is derived from two primary sources – state general fund appropriations (taxpayer support) and a variety of nongeneral fund revenues, including student tuition, fees, room and board.

State general funds 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.

Table B on page I-9 presents the 2019-20 revenue and expenditure budgets by major fund source and program classification.

Comparisons of the composition of the 2018-19 and 2019-20 revenue and expenditure budgets are included on pages I-10 (revenues) and I-11 (expenditures). As indicated on the revenue charts, the largest shift is associated with the privatization of the bookstore and its impact on the relative share of other revenue streams, particularly state general funds and tuition and fees.

For expenditures, the largest change is in the share of student financial aid, which increased from 12% of the total expenditure budget to 14%. Also impacting the distribution of the expenditure budget is the privatization of the bookstore, which played a part in reducing the overall share of auxiliary programs to total budget.

University of Mary Washington Fall Headcount Enrollment by Residency

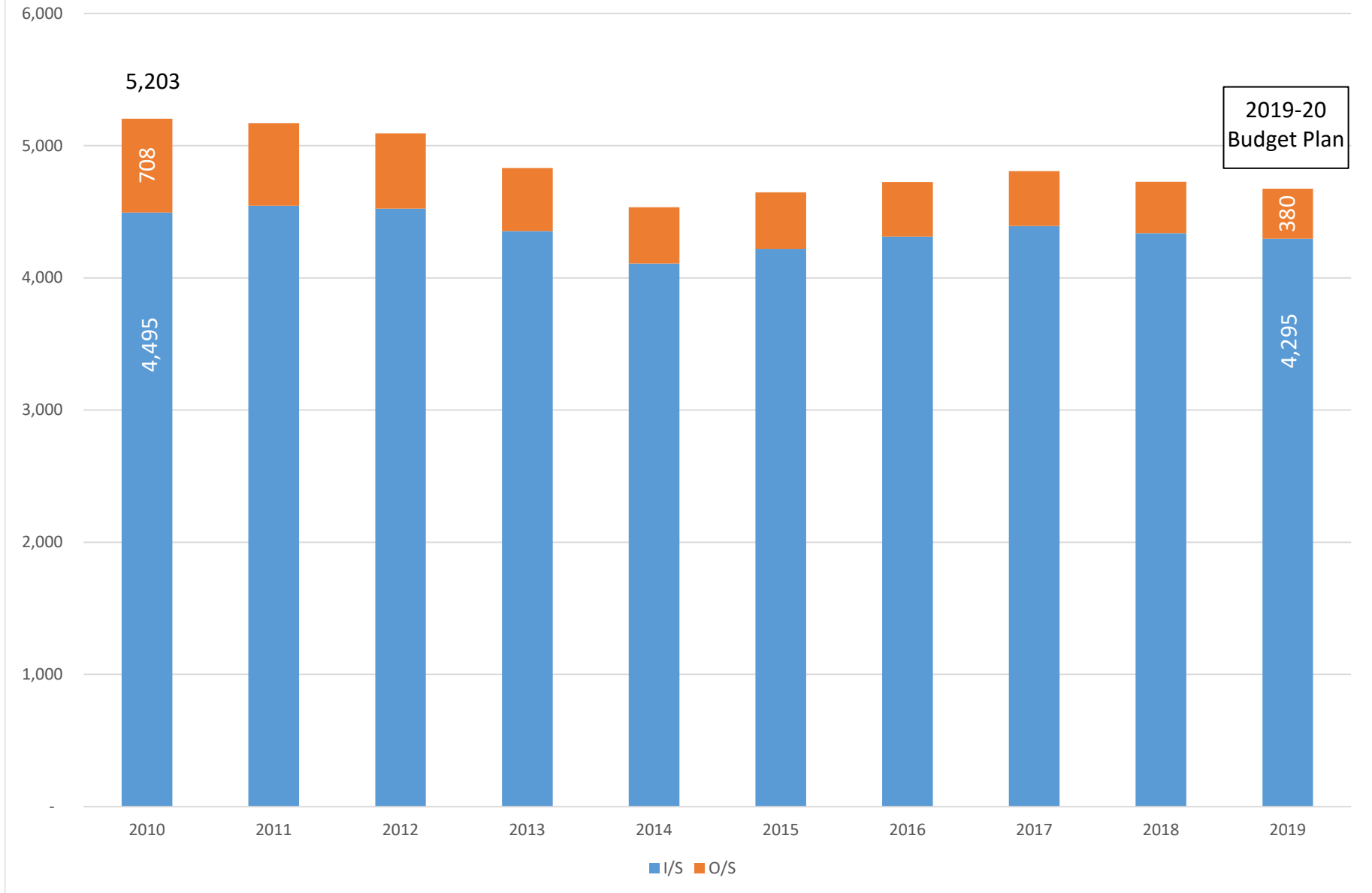
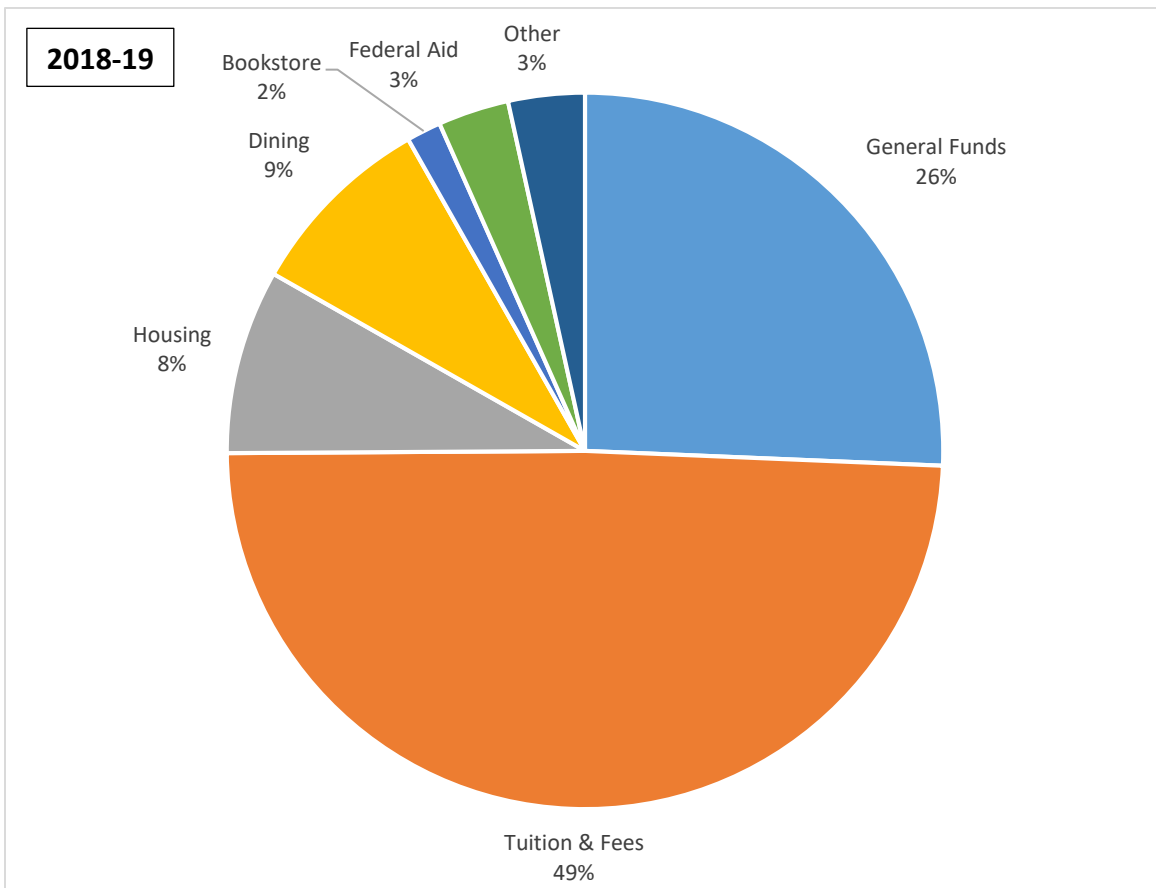
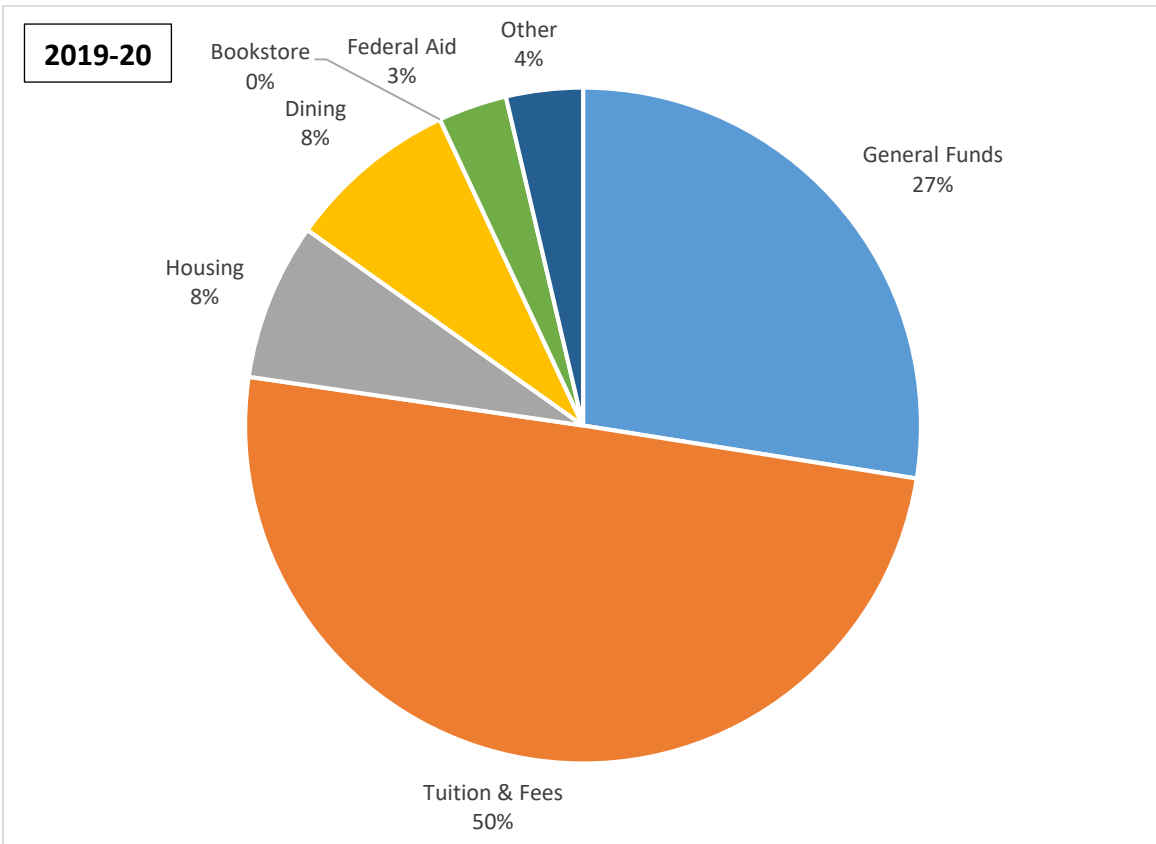


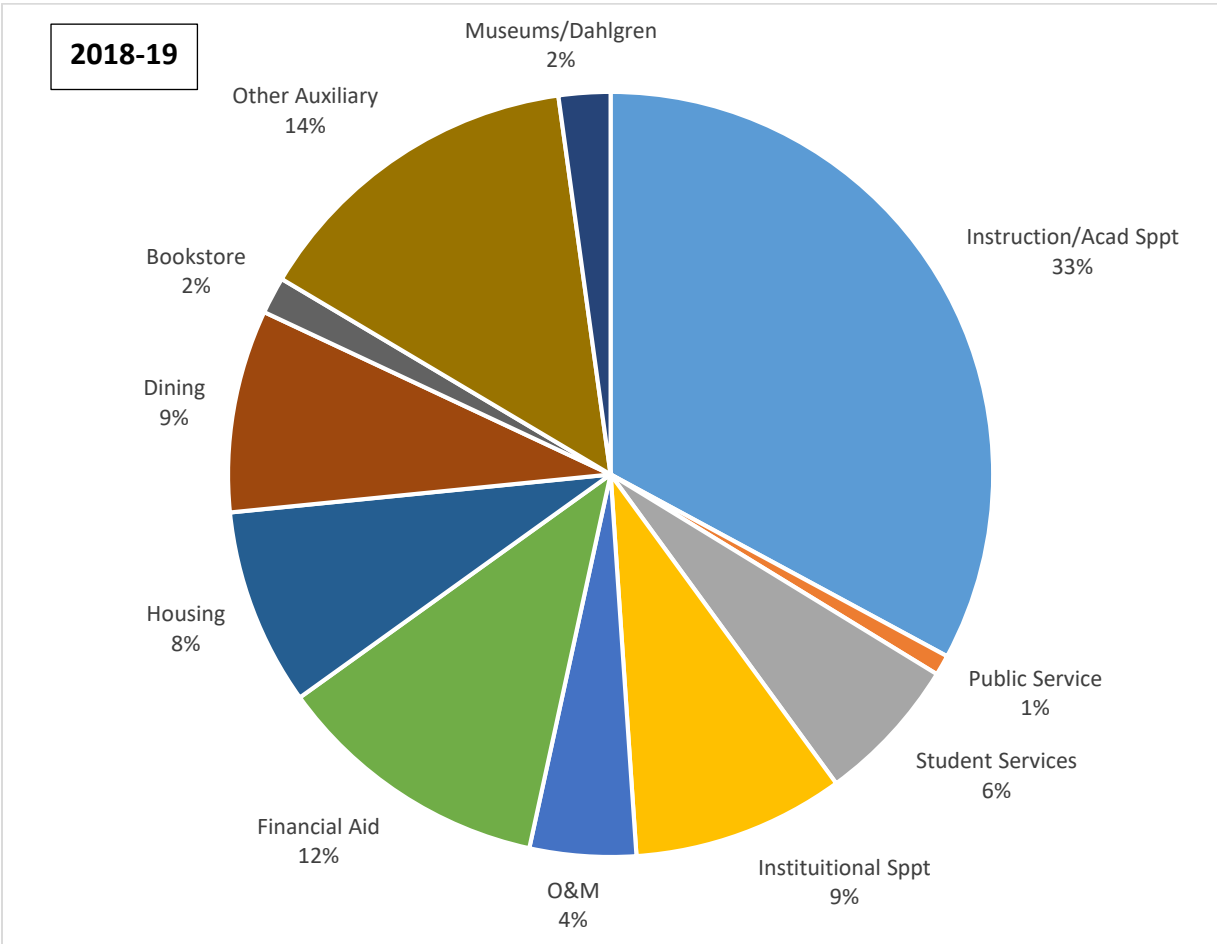
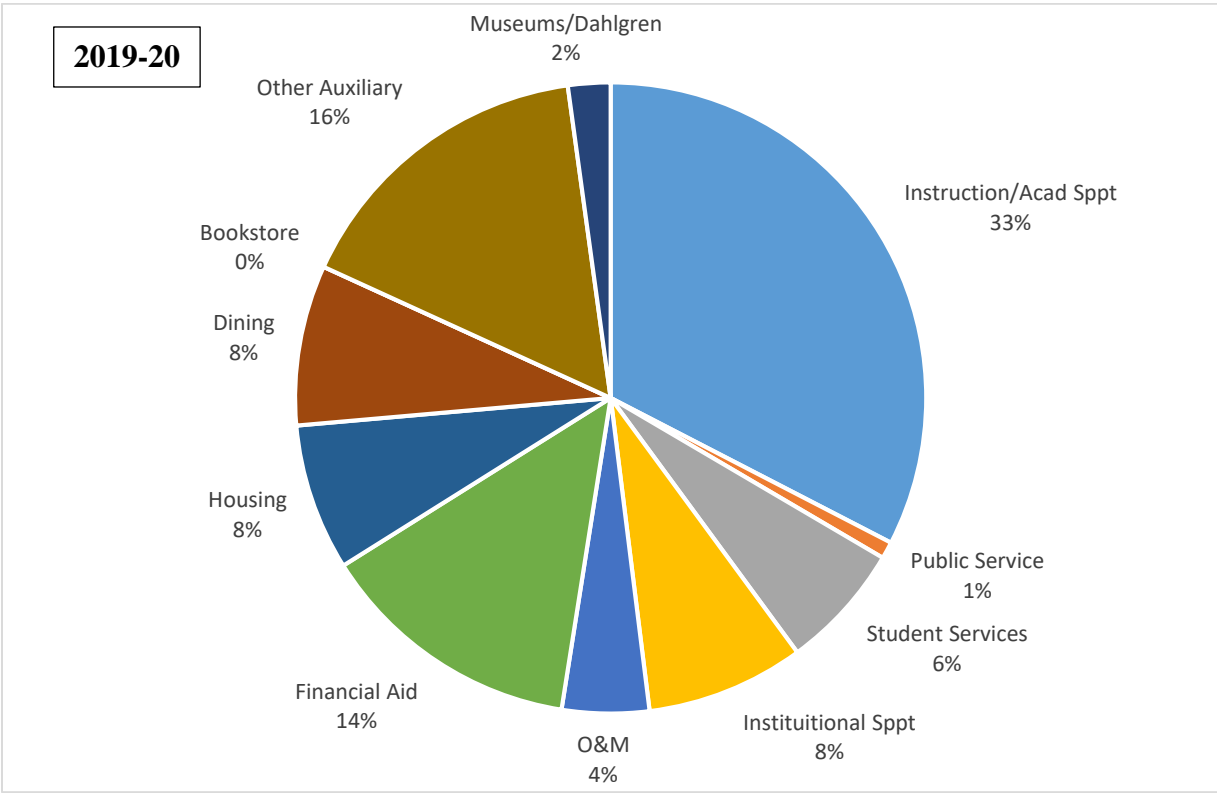
TABLE B
University of Mary Washington
2019-20 University Budget Plan
Sources and Uses Summary

FY 2019-20 Sources	Educational	Housing	Dining	Bookstore	Auxiliary	Museums	Higher	Total	Change from	
	& General Programs								& Cultural Services	Education Centers
State General Fund										
Direct Appropriations	\$ 31,352,536	\$ -	\$ -	\$ -	-	\$ 755,065	\$ 1,250,000	\$ 33,357,601	\$ 1,072,831	3.3%
Central Transfers	2,251,079	-	-	-	-	-	-	2,251,079	1,454,765	182.7%
Total General Fund	\$ 33,603,615	\$ -	\$ -	\$ -	-	\$ 755,065	\$ 1,250,000	\$ 35,608,680	\$ 2,527,596	7.6%
Nongeneral Funds										
Tuition	\$ 45,602,200	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 45,602,200	\$ (1,022,000)	-2.2%
Fees	-	-	-	-	18,860,000	-	-	18,860,000	2,006,000	11.9%
Grants and Contracts	4,261,800	-	-	-	-	-	-	4,261,800	131,800	3.2%
Sales and Services	-	9,731,000	10,636,000	-	-	-	-	20,367,000	(3,410,000)	-14.3%
Other Revenues	2,083,218	-	-	-	1,943,233	274,500	450,000	4,750,951	300,000	6.7%
Total Nongeneral Funds	\$ 51,947,218	\$ 9,731,000	\$ 10,636,000	\$ -	\$ 20,803,233	\$ 274,500	\$ 450,000	\$ 93,841,951	\$ (1,994,200)	-2.1%
Total University Sources	\$ 85,550,833	\$ 9,731,000	\$ 10,636,000	\$ -	\$ 20,803,233	\$ 1,029,565	\$ 1,700,000	\$ 129,450,631	\$ 533,396	0.4%
FY 2019-20 Uses										
Instruction	\$ 33,032,216	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 33,032,216	\$ 230,727	0.7%
Research and Public Service	1,122,633	-	-	-	-	-	-	1,122,633	15,000	1.4%
Academic Support	9,150,082	-	-	-	-	-	-	9,150,082	(441,880)	-4.6%
Student Services	8,376,914	-	-	-	-	-	-	8,376,914	361,947	4.5%
Institutional Support	10,491,435	-	-	-	-	-	-	10,491,435	(1,060,526)	-9.2%
Operation and Maintenance of Plant	5,777,491	-	-	-	-	-	-	5,777,491	(8,953)	-0.2%
Scholarships and Fellowships	17,600,062	-	-	-	-	-	-	17,600,062	2,541,081	16.9%
University Housing	-	6,361,503	-	-	-	-	-	6,361,503	798,154	14.3%
Dining	-	-	7,900,000	-	-	-	-	7,900,000	200,000	2.6%
Bookstore	-	-	-	-	-	-	-	-	(2,010,000)	-100.0%
Auxiliary Programs	-	-	-	-	26,822,945	-	-	26,822,945	(92,154)	-0.3%
Subsidy to Other Auxiliary Programs	-	3,369,497	2,736,000	-	(6,105,497)	-	-	-	-	n/a
Museums and Cultural Services										
Belmont	-	-	-	-	-	725,118	-	725,118	-	0.0%
James Monroe Museum & Library	-	-	-	-	85,785	304,447	-	390,232	-	0.0%
Subtotal - Museums/Cultural Services	-	-	-	-	85,785	1,029,565	-	1,115,350	-	0.0%
Dahlgren Education/Research Center	-	-	-	-	-	-	1,700,000	1,700,000	-	0.0%
Total University Uses	\$ 85,550,833	\$ 9,731,000	\$ 10,636,000	\$ -	\$ 20,803,233	\$ 1,029,565	\$ 1,700,000	\$ 129,450,631	\$ 533,396	0.4%

University of Mary Washington Composition of Revenue Budget



University of Mary Washington Allocation of Expenditure Budget by Program



A summary of 2019-20 budget changes by expense driver is presented on Table C on page I-16.

- The UMW operating budget is structured around six fund groups: Educational and General (E&G) Programs, University Housing, Dining, Auxiliary Programs, 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 2019-20.

A significant change reflected in the 2019-20 is the privatization of the university's bookstore. Beginning in 2019-20, the bookstore will be operated by Barnes and Noble. This reduces the university's revenue and expenditure budget by about \$2.0 million. Partnering with Barnes and Noble will improve services to faculty and staff and help to financially stabilize these operations.

- **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. Also included in this program is student financial aid, which is supported from institutional, state, and federal funding sources.

Prior to 2019-20, UMW's budget included a stand-alone E&G comprehensive fee, which, along with a separate Auxiliary comprehensive fee provided revenue to support a consolidated comprehensive fee expenditure budget.

Beginning with the 2019-20 budget, the university has streamlined its tuition and fee rate structure and its operating budget by combining the E&G Comprehensive Fee with tuition and merging the E&G Comprehensive Fee budget into E&G Programs. These actions will reduce a line-item on student bills and reduce the number of funds in the university's budget structure. These changes will not impact total student costs nor program funding in the operating budget.

Key cost drivers addressed in the 2019-20 E&G Programs budget include the following:

- \$1,718,000 for a 3% salary increase for faculty, a 2.75% across-the board increase for classified and wage staff, and a 2.25% merit increase for classified staff (additional costs are reflected in the Auxiliary budgets). All increases are effective June 10, 2019.
- \$124,800 to annualize 2018-19 market and other compensation adjustments for faculty, staff and wage positions (additional costs are reflected in the Auxiliary budgets).
- Estimated savings of \$625,000 for a health insurance premium holiday for two pay periods (additional savings are reflect in the Auxiliary budgets).
- \$225,000 in new funding support for the Career and Professional Development Center. This is in addition to the \$150,000 the university allocated in the 2018-19 in advance of anticipated state funding support through the 2019 General Assembly.

- \$2.5 million for increases in financial aid, including \$2.1 million from institutional funds (tuition), \$309,000 in additional state support, and \$132,000 in additional federal funds. Total financial aid funding for 2019-20 is budgeted at \$17.6 million, which is comprised of \$9.6 million in institutional funds, \$3.7 million in state funds, and \$4.3 million in federal funds.
- \$51,109 to support increases in state charges for VITA (technology) and the state's finance, budget, personnel and payroll systems.
- \$121,958 for cost increases for utilities, leases, and contracts (additional costs are reflected in the Auxiliary budgets).

The E&G budget also reflects a wide range of budget reductions and reallocations to balance the budget primarily through abolishing vacant positions and general operating budget reductions. These actions resulted in E&G budget savings totaling \$2.5 million in the 2019-20 budget.

- **University Housing:** This budget reflects costs to operate and manage the university's residence halls, including ongoing maintenance and debt service for the construction and maintenance of housing facilities. The Housing budget does not include residential facilities owned by the UMW Foundation (Eagle Landing and the William Street Apartments). Operating costs for Housing are supported entirely from student fees and do not receive any state funding support.

A key cost factor in the University Housing budget is the subsidization housing revenues provide to other auxiliary programs, such as athletics, student recreation, student clubs, and auxiliary facilities, such as the University Center, Anderson Center, and athletic and recreation fields and facilities. As presented on Table B, housing revenues currently provide a \$3.4 million subsidy to these other auxiliary programs. This is lower than the \$5.2 million subsidy reflected in the 2018-19 budget. The reduction in the level of the housing subsidy reflects efforts of the university to realign its pricing structure with the associated program costs.

Key cost drivers reflected in the Housing budget for 2019-20 include:

- \$21,000 for a 3.0% salary increase for administrative faculty, a 2.75% across-the-board increase for classified and wage staff and a 2.25% merit increase for classified staff. All compensation adjustments are effective June 10, 2019.
- \$5,900 to annualize for market and other compensation adjustments effective during FY19.
- \$6,000 in savings associated with a health insurance premium holiday.
- \$30,000 in contract cost increases related to the provision of internet, cable TV and telecommunications in residence halls.
- \$995,000 in additional funding for a residence hall renovation pool, which will support additional debt service costs for residence hall renovations. In the short-term these funds will support the Willard and Virginia Hall projects.

- \$48,897 in operating budget savings.

Dining Programs: The Dining Programs budget supports all costs associated with providing dining services, including the maintenance of kitchen facilities. These costs are supported entirely through student fees for meal plans and other food service charges. Currently, the university's dining program is outsourced through a contract with Sodexo.

A key cost factor in the Dining budget, is the subsidization dining revenues provide to other auxiliary programs, such as athletics, student recreation, student clubs, and auxiliary facilities, such as the University Center, Anderson Center, and athletic and recreation fields and facilities. As presented on Table B, dining revenues currently provide a \$2.7 million subsidy to these other auxiliary programs. This is lower than the \$3.3 million subsidy reflected in the 2018-19 budget. The reduction in the level of the dining subsidy reflects efforts of the university to realign its pricing structure as presented in the Huron recommendations.

Key cost drivers reflected in the Dining budget for 2019-20 include:

- \$175,000 increase in the food services contract to cover compensation and operating cost increases.
- \$25,000 increase in the university's dining maintenance contract for kitchen equipment.

- **Auxiliary Programs:** Auxiliary Programs include intercollegiate athletics, student recreation and intramural sports, student clubs and events, parking, Eagle One Card operations, and debt service, maintenance and operating costs of auxiliary facilities, such as the University Center, the Anderson Center, and athletic and recreation fields and facilities. Services under Auxiliary Programs are funded through the sale of goods (such as parking decals) and services or the Auxiliary Comprehensive Fee. Auxiliary Programs do not receive any state support, either for operating costs or for the maintenance or construction of facilities.

A key component of the budget for Auxiliary Programs is the funding subsidy provided through Housing and Dining revenues. As shown on Table B, the total subsidy reflected in the 2019-20 budget is \$6.1 million. This is lower than the \$8.5 million subsidy reflected in the 2018-19 budget. The reduction in the level of the subsidy from Housing and Dining reflects efforts of the university to realign its pricing structure with the applicable program costs.

Key cost drivers reflected in the 2019-20 Auxiliary Programs budget include the following:

- \$312,500 to annualize compensation adjustments implemented in FY19 and for a 3% salary increase for faculty, a 2.75% across-the board increase for classified and wage staff, and a 2.25% merit increase for classified staff. All increases for 2019-20 are effective June 10, 2019.

- Estimated savings of \$114,000 for a health insurance premium holiday for two pay periods.
 - Expenditure budget savings of \$585,000 associated with the planned outsourcing of other auxiliary services.
 - \$15,000 for additional wage support associated with management of the newly-renovated Amphitheatre.
- **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, revenues generated through ticket sales, gift shop revenue, facilities rental and private gifts, and a funding allocation from the Auxiliary Comp Fee budget.

No funding changes are reflected in the operating budgets for the museums, which will total \$1,115,350 2019-20.

- **Higher Education Centers:** The Higher Education Centers program reflects the operating budget for the Dahlgren Education and Research Center (DERC). For 2019-20, state general fund support for the DERC will continue at \$1,250,000 and nongeneral fund revenues, primarily facilities rental, will continue at \$450,000. In total, the DERC operating budget will be \$1,700,000 in 2019-20.

TABLE C
University of Mary Washington
2019-20 Budget Changes

	E&G Programs	Housing	Dining	Bookstore	Other Auxiliary	Total
University Priorities						
Compensation	\$1,842,800	\$26,900	-	-	\$312,500	\$2,182,200
Career-Prof Development Center	225,000	-	-	-	-	225,000
Student financial aid						
Institutional aid	2,100,000	-	-	-	-	2,100,000
State aid	309,281	-	-	-	-	309,281
Federal aid	131,800	-	-	-	-	131,800
Residence Hall renovation pool	-	995,000	-	-	-	995,000
Amphitheatre operations	-	-	-	-	15,000	15,000
Privatize bookstore operations	-	-	-	(2,010,000)	-	(2,010,000)
Outsource auxiliary operations	-	-	-	-	(585,000)	(585,000)
Total - Key Priorities	\$4,608,881	\$1,021,900	\$0	(\$2,010,000)	(\$257,500)	\$3,363,281
Other Cost Increases						
Health Insurance Premiums	(625,000)	(6,000)	-	-	(114,000)	(745,000)
State charges	51,109	-	-	-	-	51,109
Utilities/leases/contracts	121,985	30,000	200,000	-	2,873	354,858
Budget Reductions/Reallocations	(2,519,579)	(48,897)	-	-	77,624	(2,490,852)
Total 2019-20 Budget Change	\$1,637,396	\$997,003	\$200,000	(\$2,010,000)	(\$291,003)	\$533,396

2019-20 Tuition and Fees

University of Mary Washington
2019-20 Tuition and Fees

	In-State Students			Out-of-State Students		
	2018-19	2019-20	% Chg.	2018-19	2019-20	% Chg.
Full-Time Undergraduates						
Living in University Housing						
Tuition / E&G Comp Fee *	\$8,678	\$8,678	0.0%	\$24,612	\$25,104	2.0%
Auxiliary Comprehensive Fee	3,976	4,532	14.0%	3,976	4,532	14.0%
Housing (1)	6,644	6,644	0.0%	6,644	6,644	0.0%
Board (2)	4,086	4,086	0.0%	4,086	4,086	0.0%
Total	\$23,384	\$23,940	2.4%	\$39,318	\$40,366	2.7%

(1) Based on double-occupancy room in upper-class halls.

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

Full-Time Undergraduates

Living in Private Housing

Tuition / E&G Comp Fee *	\$8,678	\$8,678	0.0%	\$24,612	\$25,104	2.0%
Auxiliary Comprehensive Fee	3,976	4,532	14.0%	3,976	4,532	14.0%
Total	\$12,654	\$13,210	4.4%	\$28,588	\$29,636	3.7%

Part-Time Undergraduates

(Per credit hour rates)

Tuition / E&G Comp Fee *	\$335	\$335	0.0%	\$995	\$1,016	2.1%
Auxiliary Comprehensive Fee	116	132	13.8%	116	132	13.8%
Total	\$451	\$467	3.5%	\$1,111	\$1,148	3.3%

Part-Time Graduates

(Per credit hour rates)

Tuition / E&G Comp Fee *	\$463	\$482	4.1%	\$1,002	\$1,022	2.0%
Auxiliary Comprehensive Fee	116	132	13.8%	116	132	13.8%
Total	\$579	\$614	6.0%	\$1,118	\$1,154	3.2%

MS Geospatial Analysis Program

(Per credit hour rates)

Tuition / E&G Comp Fee *	\$463	\$482	4.1%	\$1,002	\$1,022	2.0%
Auxiliary Comprehensive Fee	116	132	13.8%	116	132	13.8%
MSGALaboratory/Equipment Fee	100	100	0.0%	100	100	0.0%
Total	\$679	\$714	5.2%	\$1,218	\$1,254	3.0%

* Beginning in 2019-20, the E&G comprehensive fee has been combined with tuition into a single charge. This technical change is cost-neutral to students. For presentation purposes the 2018-19 tuition rates also reflect this change.

Note: Eligible individuals under the "Veterans Access, Choice and Accountability Act of 2014" will qualify for the rates charged to in-state students, regardless of formal state of residence or domicile.

University of Mary Washington
2019-20 Tuition and Fees

	In-State Students			Out-of-State Students		
	2018-19	2019-20	% Chg.	2018-19	2019-20	% Chg.
<i>First-Year Rates</i>						
Single	\$8,112	\$8,112	0.0%	\$8,112	\$8,112	0.0%
Double	\$6,848	\$6,848	0.0%	\$6,848	\$6,848	0.0%
Triple	\$6,222	\$6,222	0.0%	\$6,222	\$6,222	0.0%
Quad	\$5,910	\$5,910	0.0%	\$5,910	\$5,910	0.0%
<i>Upper-Class Rates</i>						
Single	\$8,112	\$8,112	0.0%	\$8,112	\$8,112	0.0%
Double	\$6,644	\$6,644	0.0%	\$6,644	\$6,644	0.0%
Triple	\$6,220	\$6,220	0.0%	\$6,220	\$6,220	0.0%
Quad	\$5,910	\$5,910	0.0%	\$5,910	\$5,910	0.0%
<i>University Apartments</i>						
Single Room Apartment Rate	\$10,110	\$10,616	5.0%	\$10,110	\$10,616	5.0%
Double Room Apartment Rate	\$8,320	\$8,736	5.0%	\$8,320	\$8,736	5.0%
<i>Eagle Landing</i>						
Single Room Rate	\$10,438	\$10,646	2.0%	\$10,438	\$10,646	2.0%
Double Room Rate	\$8,736	\$8,910	2.0%	\$8,736	\$8,910	2.0%
<i>University Meal Plans*</i>						
Eagle Meal Plan (\$200 flex per semester)	\$5,090	\$5,090	0.0%	\$5,090	\$5,090	0.0%
225 Meal Block Plan (\$200 flex per semester)	\$4,260	\$4,260	0.0%	\$4,260	\$4,260	0.0%
150 Meal Block Plan (\$300 flex per semester)	\$4,086	\$4,086	0.0%	\$4,086	\$4,086	0.0%
85 Meal Block Plan (\$225 flex per semester)	n/a	\$2,296	n/a	n/a	\$2,296	n/a
<i>Commuter Plans*</i>						
30 Meal Block Plan (\$575 flex per semester)	\$1,608	\$1,608	0.0%	\$1,608	\$1,608	0.0%
30 Meal Block Plan (\$250 flex per semester)	\$938	\$938	0.0%	\$938	\$938	0.0%
5 Meal Block Plan (\$300 flex per semester)	n/a	\$676	n/a	n/a	\$676	n/a
4 Meal Plan per Week (\$50 flex per semester plus buy-up option)	n/a	\$974	n/a	n/a	\$974	n/a

* Students subscribing to a meal plan that includes flex dollars may purchase additional flex in blocks of \$25 beginning in week 8 of each semester. Unused flex dollars at the end of the fall semester will roll over to the spring semester if the student has subscribed to a meal plan with flex dollars for the spring semester. Unused flex dollars at the end of the spring semester will be forfeited.

**University of Mary Washington
2019-20 Tuition and Fees**

	<u>In-State Students</u>			<u>Out-of-State Students</u>			
	<u>2018-19</u>	<u>2019-20</u>	<u>% Chg.</u>	<u>2018-19</u>	<u>2019-20</u>	<u>% Chg.</u>	
<i>Summer Housing Rates</i>	<u>Summer 2019</u>			<u>Summer 2020</u>			
	<u>Session / Week / Day</u>			<u>Session / Week / Day</u>		<u>Inc.</u>	
Eagle Landing							
Single	\$1,304	/ 261	/ 37	\$1,330	/ 266	/ 38	2.0%
Double	\$1,063	/ 213	/ 31	\$1,084	/ 217	/ 32	2.0%
University Apartments							
Single	\$1,602	/ 333	/ 47	\$1,682	/ 350	/ 49	5.0%
Double	\$1,318	/ 264	/ 40	\$1,384	/ 277	/ 42	5.0%
Triple	\$1,188	/ 238	/ 35	\$1,247	/ 250	/ 37	5.0%
University Housing							
Single	\$1,201	/ 240	/ 34	\$1,201	/ 240	/ 34	0.0%
Double	\$903	/ 180	/ 26	\$903	/ 180	/ 26	0.0%
<i>Summer Meal Plans</i>							
50 Meal Block per Summer Session		\$390		\$390		0.0%	
30 Meal Block per Summer Session		\$267		\$267		0.0%	
15 Meal Block per Summer Session		\$134		\$134		0.0%	
<i>Summer Parking Decals</i>							
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
2019-20 Tuition and Fees

	In-State Students			Out-of-State Students		
	2018-19	2019-20	% Chg.	2018-19	2019-20	% Chg.
Other Undergraduate/Graduate Fees and Charges						
Undergraduate overload fee <i>(per credit hour over 18 semester hrs.)</i>	\$335	\$335	0.0%	\$995	\$1,016	2.1%
Undergraduate surcharge <i>(per credit hour charge for all credits above 152 for BA/BS students and above 150 credits for BLS students)</i>	\$366	\$366	0.0%	n/a	n/a	n/a
Application Fee	\$50	\$50	0.0%	\$50	\$50	0.0%
Tuition Deposit (Undergraduate and Graduate)	\$300	\$300	0.0%	\$300	\$300	0.0%
Processing Fee	\$30	\$30	0.0%	\$30	\$30	0.0%
New Student Programs & Arrival Fee - Summer/Fall	\$400	\$400	0.0%	\$400	\$400	0.0%
New Student Programs & Arrival Fee - Spring	\$200	\$200	0.0%	\$200	\$200	0.0%
New Experiences for Students Transitioning (NEST)	\$300	\$300	0.0%	\$300	\$300	0.0%
First-Year Honors Orientation	\$100	\$100	0.0%	\$100	\$100	0.0%
Student Outdoor Adventure Retreat (SOAR)	\$25	\$25	0.0%	\$25	\$25	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%
Extended Stay Fee (per day)	\$30	\$30	0.0%	\$30	\$30	0.0%
Lost Keys	\$125	\$125	0.0%	\$125	\$125	0.0%
Study Abroad Processing Fee	\$300	\$300	0.0%	\$300	\$300	0.0%
BLS Portfolio Evaluation Fee	\$100	\$100	0.0%	\$100	\$100	0.0%
Course Audit Fee (per credit hour)	\$30	\$30	0.0%	\$30	\$30	0.0%
Special Exam Fee (per credit hour)	\$15	\$15	0.0%	\$15	\$15	0.0%
Music - Private lessons						
One-half hour lesson per week (1 credit)	\$350	\$350	0.0%	\$350	\$350	0.0%
One-hour lesson per week (2 credits)	\$700	\$700	0.0%	\$700	\$700	0.0%
Music - Instrument Rental Fee (per term)	\$50	\$50	0.0%	\$50	\$50	0.0%
Equestrian Fee (per semester)						
Beginners & Advanced Beginners	\$795	\$795	0.0%	\$795	\$795	0.0%
Intermediate & Advanced	\$855	\$855	0.0%	\$855	\$855	0.0%
Parking Decal (on-campus, academic year)	\$225	\$225	0.0%	\$225	\$225	0.0%
Eagle Landing Parking Deck and Decal	\$375	\$375	0.0%	\$375	\$375	0.0%

Note: The President or his designee(s) may set fees and other charges for courses and programs offered through UMW's Office of Continuing and Professional Studies. These rates shall be consistent with the University's mission, the overall tuition and fee rate schedules, and state requirements.

Undergraduate Cost Comparisons

In-State and Out-of-State Tuition, Required Fees, and Room and Board Charges
Virginia State Supported Four-Year Institutions
2018-19

Rank	IS Commuter*		OS Commuter*		Room & Board		IS Total		OS Total	
	1	W&M	\$23,400	UVA	\$48,236	W&M	\$12,236	W&M	\$35,636	UVA
2	VMI	\$18,862	VMI	\$45,706	CNU	\$11,460	VMI	\$28,344	W&M	\$57,508
3	UVA	\$16,512	W&M	\$45,272	GMU	\$11,460	UVA	\$27,864	VMI	\$55,188
4	CNU	\$14,754	GMU	\$35,922	UVA	\$11,352	CNU	\$26,214	GMU	\$47,382
5	VCU	\$14,490	VCU	\$35,798	VSU	\$11,208	VCU	\$24,918	VCU	\$46,226
6	VT	\$13,620	VT	\$31,908	LU	\$11,026	LU	\$24,366	VT	\$40,842
7	LU	\$13,340	ODU	\$29,772	UMW	\$10,730	GMU	\$23,922	LU	\$40,326
8	UMW	\$12,654	LU	\$29,300	JMU	\$10,512	UMW	\$23,384	ODU	\$40,234
9	GMU	\$12,462	UMW	\$28,588	ODU	\$10,462	VT	\$22,554	UMW	\$39,318
10	JMU	\$12,016	JMU	\$28,416	UVA-W	\$10,438	JMU	\$22,528	CNU	\$39,080
11	RU	\$11,210	UVA-W	\$27,846	VCU	\$10,428	ODU	\$21,334	JMU	\$38,928
12	ODU	\$10,872	CNU	\$27,620	NSU	\$10,360	RU	\$20,616	UVA-W	\$38,284
13	UVA-W	\$10,119	RU	\$23,292	VMI	\$9,482	UVA-W	\$20,557	RU	\$32,698
14	NSU	\$9,490	NSU	\$21,418	RU	\$9,406	VSU	\$20,264	NSU	\$31,778
15	VSU	\$9,056	VSU	\$20,307	VT	\$8,934	NSU	\$19,850	VSU	\$31,515

*Includes tuition and all mandatory fees.

For UVA and W&M, the in-state tuition and fee amount reflects charges for freshmen and transfer students. Continuing students will pay varying rates based on year of matriculation.

Source: SCHEV 2018-19 Tuition and Fees Report- August 2018

Glossary

University of Mary Washington 2019-20 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), Historic and Commemorative Attraction Management (James Monroe Museum and Library), Higher Education Centers (Dahlgren Campus), 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 enrollment load, instructional program and residency status.

Comprehensive Fee: A fixed rate based on each student's enrollment load the revenue from which supports 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 Center for Economic Development.

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, deans' 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.

Museums 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

auxiliary programming, such as intercollegiate athletics, student recreation, student clubs and events, parking, and debt service on auxiliary facilities (excluding residence halls).

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 or double).

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 the Eagle Meal Plan. All other students living in university Housing may choose the Eagle Meal Plan, the 225 Meal Block Plan or the 150 Meal Block Plan.

All students living in either the University Apartments or Eagle Landing may choose the Eagle Plan or one of the following Block Plans: the 225, 150, 90 or 75.

Meal plans are also available to commuter students, including 8, 5, and 3 meal block plans.

Mandatory Processing Fee: A 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.

New Student Programs and Arrival Fee: A mandatory one-time fee charged to all undergraduate BA/BS students who are new to the University. The fee covers welcome and arrival activities and programs as well as academic advising, course registration and common intellectual experiences.

NEST Fee: A fee for students participating in the optional NEST (New Experiences for Students Transitioning) orientation program. NEST is a four-day program open to all incoming freshmen and offers a unique opportunity to bond with fellow students while participating in activities that encompass UMW's core values of Honor, Leadership, and Social Justice.

SOAR Fee: A fee for students participating in the optional SOAR (Summer Orientation Adventure Retreat). The SOAR experience is designed to give new students an opportunity to build social connections with other trip member and introduce them to local natural areas surrounding Fredericksburg.

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.

Musical Instrument Rental Fee: A fee charged to students to rent a musical instrument 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.