



2020-21  
University Budget Plan  
and  
Tuition and Fees

UMW Board of Visitors  
June 10, 2020

**TABLE A**

**University of Mary Washington  
2020-21 University Budget Plan**

	2019-20 Revised Budget	2020-21 Budget Plan	Change Over 2019-20
<b>Sources</b>			
State General Funds*			
Educational and General Programs	\$ 29,448,555	\$ 27,943,152	-5.1%
Student Financial Assistance	3,738,262	3,738,262	0.0%
Belmont / James Monroe Museum	755,077	755,077	0.0%
Dahlgren Campus	1,250,000	1,250,000	0.0%
Total General Funds	<u>\$ 35,191,894</u>	<u>\$ 33,686,491</u>	-4.3%
Nongeneral Funds			
Tuition	\$ 45,086,224	\$ 39,464,224	-12.5%
Fees	18,759,276	18,375,276	-2.0%
Sales and Services			
Housing	9,912,500	9,117,500	-8.0%
Dining	10,240,000	9,240,000	-9.8%
Parking	450,000	405,000	-10.0%
Grants and Contracts	3,931,000	4,158,000	5.8%
Other Sources	4,351,440	4,035,940	-7.3%
Total Nongeneral Funds	<u>\$ 92,730,440</u>	<u>\$ 84,795,940</u>	-8.6%
<b>Total Sources</b>	<u><u>\$ 127,922,334</u></u>	<u><u>\$ 118,482,431</u></u>	-7.4%
<b>Uses</b>			
Instruction	\$ 32,220,814	\$ 30,551,892	-5.2%
Research and Public Service	1,320,898	905,183	-31.5%
Academic Support	8,869,249	6,295,442	-29.0%
Student Services	8,964,025	8,073,063	-9.9%
Institutional Support	10,410,051	9,839,564	-5.5%
Operation and Maintenance of Plant	9,846,558	9,169,108	-6.9%
Scholarships and Fellowships	17,269,262	16,896,262	-2.2%
University Housing	6,396,697	6,856,362	7.2%
Dining	7,553,968	7,179,968	-5.0%
Parking	822,534	799,110	-2.8%
Other Auxiliary Programs	21,423,916	19,092,115	-10.9%
Museums & Cultural Services	1,124,362	1,124,362	0.0%
Higher Education Centers	1,700,000	1,700,000	0.0%
<b>Total Uses</b>	<u><u>\$ 127,922,334</u></u>	<u><u>\$ 118,482,431</u></u>	-7.4%
<b>Budget Balance</b>	<u><u>\$ -</u></u>	<u><u>\$ -</u></u>	

\* Includes both direct appropriations and estimated central transfers.

# University of Mary Washington 2020-21 University Budget Plan

## Highlights

### Overview

- Table A on page 1 summarizes projected university sources and uses for 2020-21.
  - The budget is balanced with projected sources and uses estimated at \$118.5 million.
  - The 2020-21 budget represents a 7.4% decrease over the 2019-20 budget.
  
- The University of Mary Washington's 2020-21 budget plan was prepared in an environment of considerable uncertainty due to the COVID-19 pandemic. Key factors that will have a significant impact on the university's operations and its budget include:
  - The ability of the Commonwealth and the nation to flatten the curve in the number of COVID-19 cases
  - The development and distribution of an effective vaccine
  - The availability of the Commonwealth to assist in testing and contact tracing
  - The extent of state funding cuts during the 2020-21 fiscal year as the state responds to declining revenue collections
  - Student enrollment for both the fall and spring semesters
  - Whether UMW will need to continue to teach remotely and for how long
  - The potential for a disruption during the fall or spring semesters should the virus spike
  - If students are on campus, how classroom instruction, university housing, dining, and other student services will be managed to ensure the health and safety of students, faculty and staff
  - Additional technology requirements moving forward for both instruction (regardless of whether it is remote or in the classroom) and staff teleworking
  - The availability and distribution of PPE for students, faculty, and staff
  - The availability of additional emergency funding support through the Commonwealth, Congress or federal agencies, such as FEMA

Given the wide range of uncertainty and the potential for significant financial implications to the university's operating budget, this budget plan should be viewed as an interim plan and subject to modification as more information becomes available. It is almost certain that the university will have to revise its 2020-21 budget plan in early fall with the potential for additional revisions in the spring.

This interim budget plan includes several key assumptions:

- Students are on-campus for classroom instruction, living in the residence halls, subscribing to dining plans, albeit under modified operating conditions
- There are 10% declines in enrollment (for both the freshman class and returning students), residency hall occupancy, and dining plan subscriptions
- There is a funding reduction of 5% in state support for E&G Programs

Using these preliminary planning assumptions, revenues are expected to decline \$10.2 million from the 2019-20 adjusted budget. In order to balance the 2020-21 budget, the university will implement targeted operating budget reductions of \$8.6 million coupled with temporary pay reduction actions of \$1.6 million. A summary of these actions is presented on Table B on page 6.

### **Tuition and Fees**

- The 2020-21 budget plan is based on the tuition, fees, housing and dining rates as presented on pages 15 through 18. The following is a summary of the total tuition and fee charges for 2020-21:

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

	<u>2019-20</u>	<u>2020-21</u>	<u>Change</u>
In-State	\$23,940	\$24,438	2.1%
Out-of-State	\$40,366	\$40,864	1.2%

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

	<u>2019-20</u>	<u>2020-21</u>	<u>Change</u>
In-State	\$13,210	\$13,574	2.8%
Out-of-State	\$29,636	\$30,000	1.2%

### *Key Considerations in 2020-21 Tuition and Fee Rate Setting*

Key considerations in the development of the 2020-21 tuition and fee rates as adopted by the UMW Board of Visitors on May 8, 2020, are summarized below.

Initially, the 2020 General Assembly adopted a budget that included support for an In-State Undergraduate Affordability and six-Year Plan Funding Pool. Allocations from this pool would be made to institutions that held tuition flat for in-state undergraduates for the 2020-21 academic year. Under the terms of this pool, UMW was eligible for an allocation of \$3.2M. However, in light of uncertainty around the impact of the pandemic and its potential effect on state revenues, this funding (as well as all other new initiative funding included in the original budget passed by the General Assembly) was unallotted in the final budget. State funds that are unallotted cannot be spent, although the appropriation remains in place and could be re-enacted by the General Assembly based on updated state revenue forecasts.

Although the loss of state funding is significant and some of that loss could be offset with tuition increases, UMW's administration recommend, and the BOV adopted, a plan that includes no tuition increase. This action acknowledges the significant financial impact that the pandemic is having on the economy and on the personal finances of many of our students and their families.

There are, however, a number of cost drivers impacting the budget related to the auxiliary comprehensive fee and residence hall rates. These include debt service for the renovation of Virginia Hall and continued implementation of a budget realignment between revenues and expenses for our auxiliary programs.

***Debt Service for Renovation of Virginia Hall.*** With the completion of the Willard Hall renovation, the university immediately moved to renovate Virginia Hall. The cost of the Virginia Hall renovation is planned at \$24.5 million and the operating budget estimates call for a two-year phase-in of the debt service requirement. For 2020-21, the projected budget includes \$600,000 for a debt service pool with an additional \$675,000 requirement in 2021-22.

***Realignment of UMW's Auxiliary Revenue and Expenditure Budgets.*** Beginning with the 2019-20 budget, UMW adopted a multi-year strategy to more closely align room and board charges to the full cost of delivery for these services. This strategy includes keeping room and board rates flat or as low as possible given other market considerations and shifting the cost of other auxiliary programs (athletics, recreation, student programs, etc.) to the Auxiliary Comprehensive Fee. In this regard, no increase is recommended for dining, a 2% increase is recommended for housing (to offset the additional debt service cost), and an 8% increase is proposed for the Auxiliary Comprehensive Fee. Because tuition is being held flat, the total increase for a full-time in-state undergraduate student living on-campus and subscribing to a meal plan is 2.1% and for out-of-state students the increase is 1.2%.

**Comparisons with other Virginia public institutions:** A comparison of 2019-20 tuition and fee charges among Virginia's public four-year institutions is presented on page 19. Of the 15 public universities in Virginia, UMW's total tuition and fee charges for in-state and out-of-state commuter students and for in-state residential students, which includes room and board, are ranked 8<sup>th</sup> (#1 being the highest charges; #15 the lowest).

Similarly, UMW's 2019-20 tuition and fee charges for out-of-state residential students are 9<sup>th</sup> out of the 15 Virginia institutions.

**The detailed tuition and fee schedules for 2020-21 are presented on pages 15 through 18.**

## **2020 General Assembly**

- Prior to the pandemic, the 2020-22 biennial budget adopted by the 2020 General Assembly included funding support for a number of key university priorities, including:
  - A 3% bonus for faculty and staff effective December 1, 2020, and a permanent 3% salary for faculty and staff effective June 10, 2021.
  - An allocation of \$3.2 million from the In-State Undergraduate Affordability and Six-Year Plan Funding Pool for holding tuition flat for in-state undergraduate students.

- New state funding support of \$386,500 in the first year of the biennium and \$568,000 in the second year for UMW's Workforce Development Initiative.
- Additional general fund support of \$470,300 for student financial assistance through the state's financial aid program.

Funding for these initiatives, however, has been unallotted in the final state budget and is not included in the university's 2020-21 budget plan.

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 7.

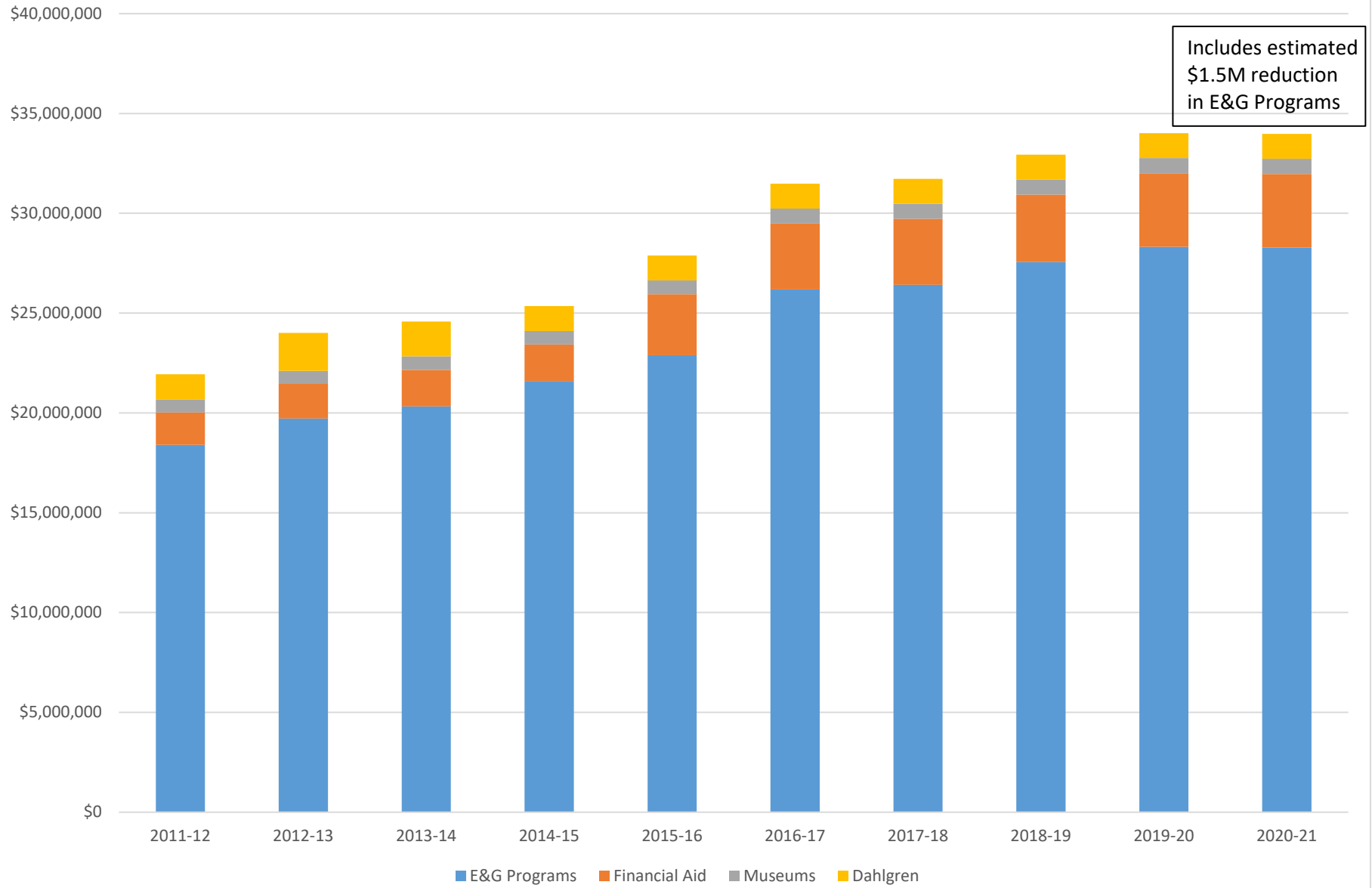
**TABLE B**  
**University of Mary Washington**  
**Summary of Budget Reduction Actions**

	VP Reduction Plans	Other Reduction Actions	Pay Reduction Plan	Total
<b>E&amp;G</b>				
Instruction	1,368,711	-	732,391	2,101,102
Research / Public Service	304,805	-	16,682	321,487
Academic Support	2,537,678	-	170,055	2,707,733
Student Services	830,217	-	140,961	971,178
Institutional Support	1,034,220	303,000	222,800	1,560,020
O&M of Plant	518,964	-	76,482	595,446
<b>Total E&amp;G</b>	<b>6,594,595</b>	<b>303,000</b>	<b>1,359,371</b>	<b>8,256,966</b>
Housing	94,520	-	12,167	106,687
Dining	10,000	-	-	10,000
Parking	22,500	-	1,354	23,854
Comp Fee	1,666,149	-	144,496	1,810,645
<b>Total</b>	<b>8,387,764</b>	<b>303,000</b>	<b>1,517,388</b>	<b>10,208,152</b>

<b>Teaching Faculty</b>	Pay Reduction
Below \$75,000	3.1%
\$75,000 - \$99,999	3.5%
\$100,000 - \$124,999	3.8%
\$125,000 - \$149,999	4.6%
\$150,000 and above	5.7%

<b>AP Faculty, Classified, Wage</b>	Furlough Days	Reduction Equivalent
Below \$30,000	-	n/a
\$30,000 - \$39,999	5	1.9%
\$40,000 - \$49,999	7	2.7%
\$50,000 - \$74,999	8	3.1%
\$75,000 - \$99,999	9	3.5%
\$100,000 - \$124,999	10	3.8%
\$125,000 - \$149,999	12	4.6%
\$150,000 and above	15	5.7%

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





## **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 C on page 12 presents the 2020-21 revenue and expenditure budgets by major fund source and program classification.

Comparisons of the composition of the 2019-20 and 2020-21 revenue and expenditure budgets are included on pages 13 (revenues) and 14 (expenditures). In general, the composition of the revenue budget for 2020-21 is consistent with 2019-20 largely due to estimated revenue reductions for both student tuition and fees and state general fund support, which are the two largest revenue sources.

There is similar comparability between the two fiscal years in the composition of expenditures, primarily because the planned budget reductions are distributed across all areas of the university's budget.

- ❑ The UMW operating budget is structured around seven fund groups: Educational and General (E&G) Programs, University Housing, Dining, Parking, Other 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 2020-21.
  - **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.

Key cost drivers addressed in the 2020-21 E&G Programs budget include the following:

- \$625,000 to reverse a one-time health insurance premium holiday in 2019-20.
- \$170,000 for a state mandated rate increase for employer retirement contributions under the Virginia Retirement System (VRS).

- \$500,000 for a permanent marketing budget to support ongoing re-branding efforts.
  - \$50,000 to support contracted services to undertake annual IT security audits.
  - A budget reduction of \$600,000 in institutional funds for student financial aid associated with a projected decline of 10% in enrollment. With this reduction, the institutional aid budget will be at \$9.0 million, with an additional \$3.7 million through the state financial aid program and \$4.2 million through federal aid programs, for a total budget of \$16.9 million in 2020-21.
  - \$51,000 to support increases in state charges for VITA (technology) and the state's finance, budget, personnel and payroll systems.
  - \$122,000 for cost increases for utilities, leases, and contracts (additional costs for these items are reflected in the Auxiliary budgets).
  - Savings of \$8.3 million from operating budget and pay reduction plans.
- **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 renovation 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 C on page 12, housing revenues currently provide a \$2.3 million subsidy to these other auxiliary programs. This is lower than the \$3.5 million subsidy reflected in the 2019-20 budget. The reduction in the level of the housing subsidy reflects efforts by the university to realign its pricing structure with associated program costs.

Key cost drivers reflected in the Housing budget for 2020-21 include:

- \$600,000 for debt service for the Virginia Hall renovation project. An additional \$675,000 will be required in the 2021-22 budget to fully cover the debt service for this \$24.5 million project.
  - \$107,000 in savings associated with budget reductions and one-time employee pay actions.
  - \$35,000 in savings associated with a contract renegotiation for the provision of internet, cable TV and telecommunications in residence halls.
- **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 C on page 12, dining revenues currently provide a \$2.1 million subsidy to these other auxiliary programs. This is lower than the \$2.7 million subsidy reflected in the 2019-20 budget. The reduction in the level of the dining subsidy reflects efforts by the university to realign its pricing structure with associated program costs.

Key cost drivers reflected in the Dining budget for 2020-21 include:

- \$136,000 increase in the food services contract to cover compensation and operating cost increases.
  - \$500,000 in estimated contract savings associated with a 10% reduction in meal plan subscriptions.
- **Parking:** The Parking budget includes all aspects of operations supporting parking for students, faculty, staff, and visitors including administration of parking decals, enforcement (ticketing), debt service for the Alvey Deck, and university-wide communications on lot closures or restricted use.

The key factor impacting the Parking budget include:

- A reduction in revenues consistent with an estimated 10% enrollment decline.
  - Operating and pay reduction plan savings of \$24,000.
- **Other Auxiliary Programs:** Other 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 and services (such as facilities rentals) 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 from Housing and Dining revenues. As shown on Table C on page 12, the total subsidy reflected in the 2020-21 budget is \$3.9 million. This is lower than the \$5.9 million subsidy reflected in the 2019-20 budget. The reduction in the level of the subsidy from Housing and Dining reflects efforts by the university to realign its pricing structure with the applicable program costs.

Key cost drivers reflected in the 2020-21 Auxiliary Programs budget include the following:

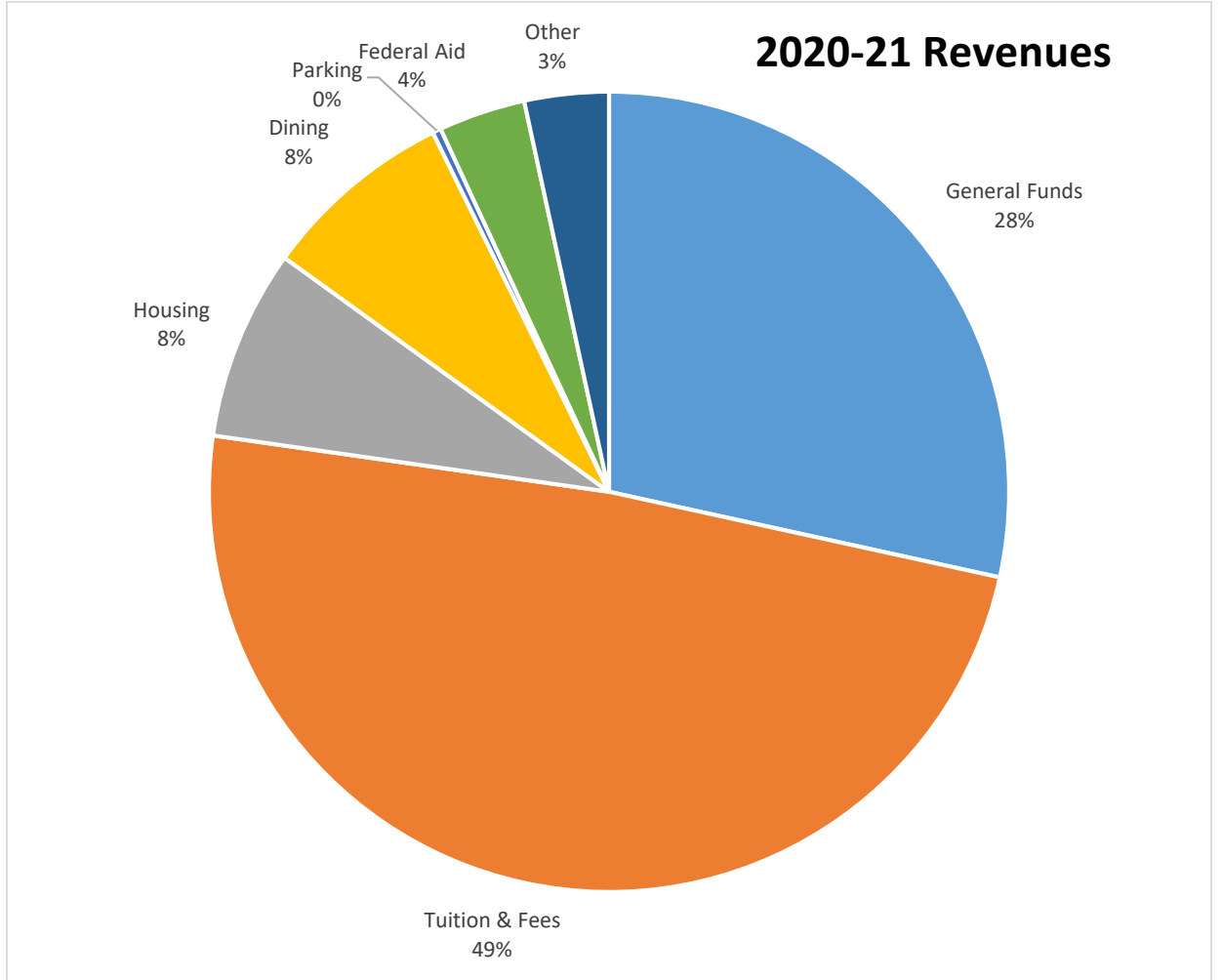
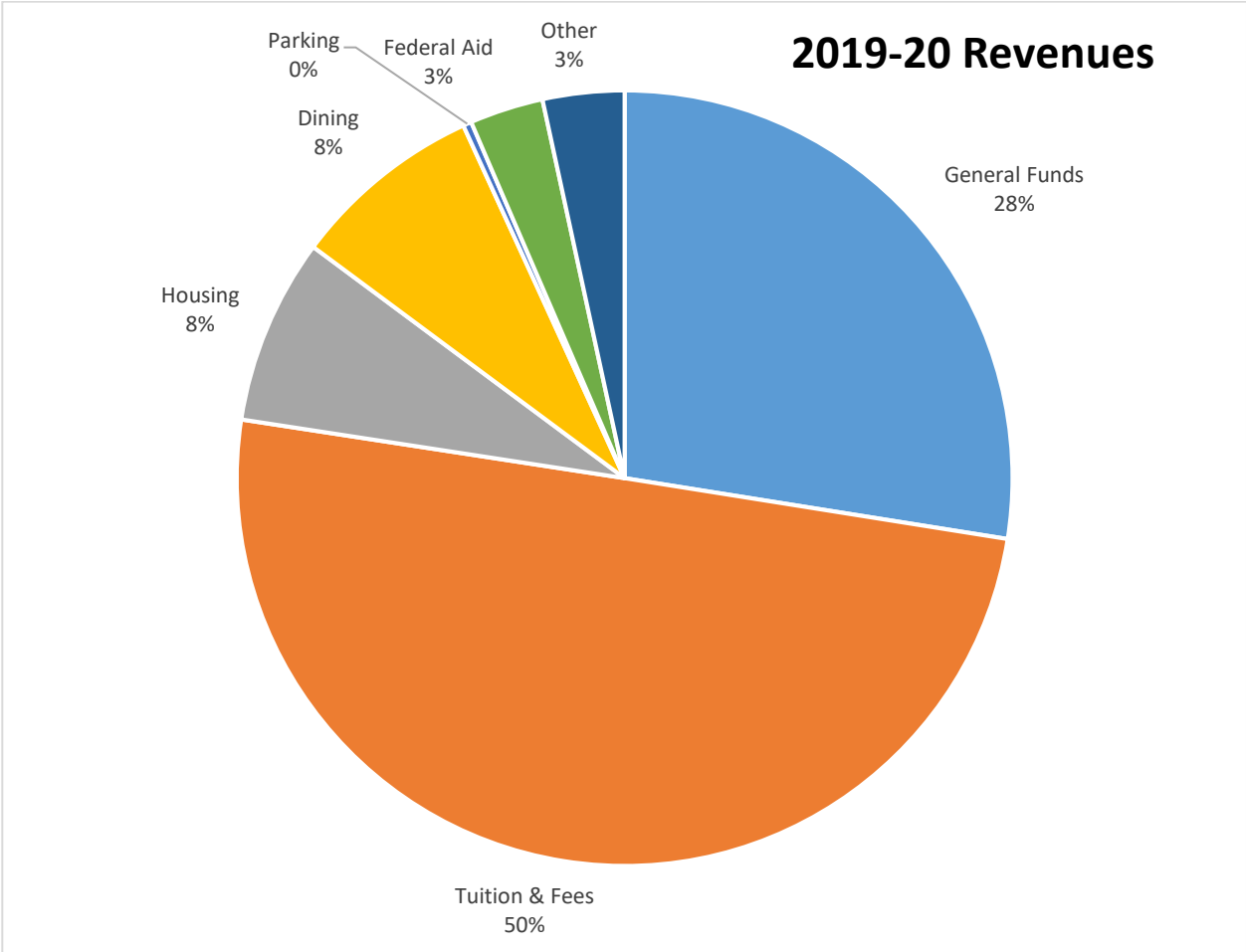
- \$120,000 to reverse the one-time health insurance premium holiday in the 2019-20 budget.
- Operating budget and pay reduction savings of \$1.8 million.
  
- **Museums and Cultural Services:** The museums and cultural services program includes the operating budgets for Belmont and the James Monroe 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 \$1,124,362 for 2020-21. Although employees at the Museums will follow the same employee pay reduction plan as the rest of the university, the associated savings of \$17,000, will be retained by the Museums for operating budget needs or to address a potential reduction in state funding support.

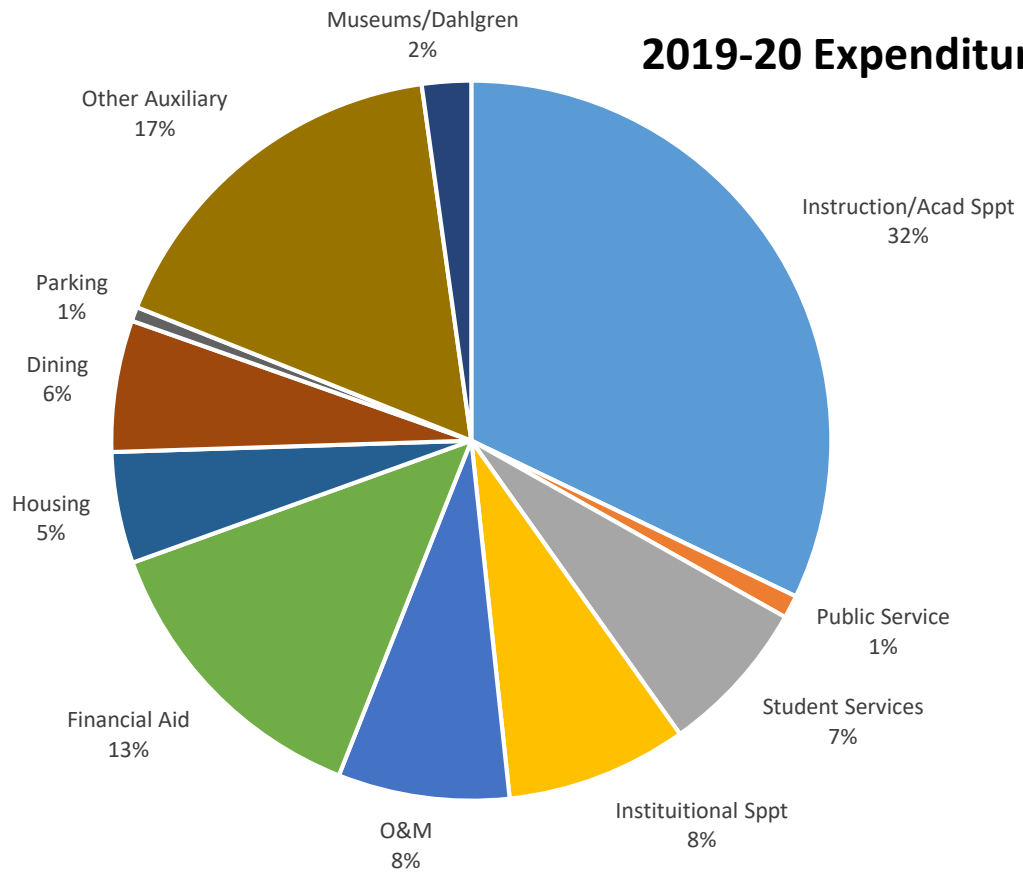
- **Higher Education Centers:** The Higher Education Centers program reflects the operating budget for the Dahlgren Education and Research Center (DERC). For 2020-21, state general fund support for the DERC will continue at \$1,250,000 and nongeneral fund revenues, primarily facilities rental, will continue at \$450,000. In total, the DERC operating budget will be \$1,700,000 in 2020-21. Although employees at the DERC will follow the same employee pay reduction plan as the rest of the university, the associated savings of \$8,000, will be retained by the DERC for operating budget needs or to address a potential reduction in state funding support.

**TABLE C**  
**University of Mary Washington**  
**2020-21 University Budget Plan**  
**Sources and Uses Summary**

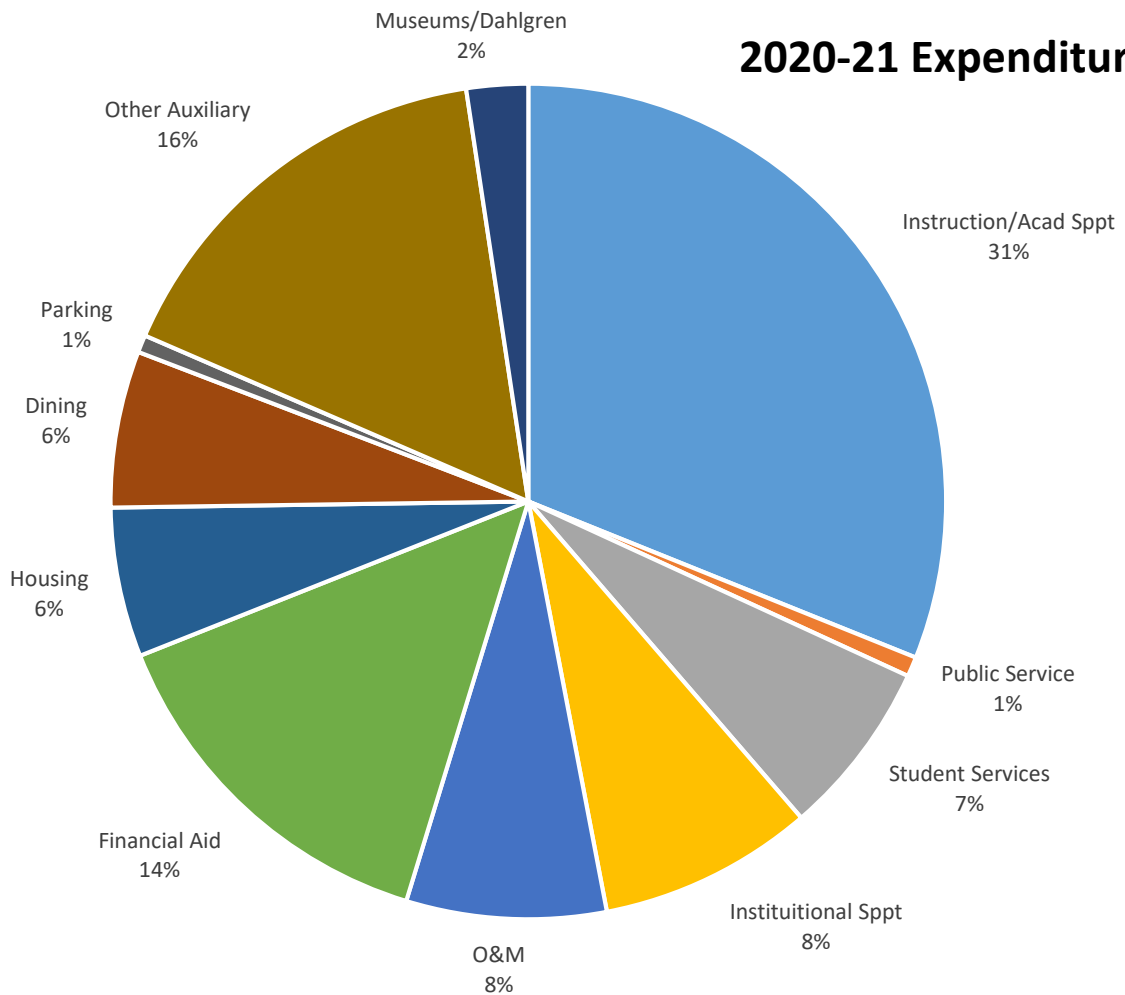
FY 2020-21 Sources	Educational	Housing	Dining	Parking	Other	Museums	Higher	Total	Change from		
	& General Programs				Auxiliary Programs	& Cultural Services	Education Centers		University	2019-20 Budget	Percent
<b>State General Fund</b>											
Direct Appropriations	\$ 33,084,114	\$ -	\$ -	\$ -	\$ -	\$ 755,077	\$ 1,250,000	\$ 35,089,191	\$ 1,731,578	5.2%	
Central Transfers	(1,402,700)	-	-	-	-	-	-	(1,402,700)	(3,236,981)	-176.5%	
<b>Total General Fund</b>	<b>\$ 31,681,414</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 755,077</b>	<b>\$ 1,250,000</b>	<b>\$ 33,686,491</b>	<b>\$ (1,505,403)</b>	<b>-4.3%</b>	
<b>Nongeneral Funds</b>											
Tuition	\$ 39,464,224	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 39,464,224	\$ (5,622,000)	-12.5%	
Fees	-	-	-	-	18,375,276	-	-	18,375,276	(384,000)	-2.0%	
Grants and Contracts	4,158,000	-	-	-	-	-	-	4,158,000	227,000	5.8%	
Sales and Services	-	9,117,500	9,240,000	405,000	-	-	-	18,762,500	(1,840,000)	-8.9%	
Other Revenues	1,814,535	-	-	36,000	1,451,905	283,500	450,000	4,035,940	(315,500)	-7.3%	
<b>Total Nongeneral Funds</b>	<b>\$ 45,436,759</b>	<b>\$ 9,117,500</b>	<b>\$ 9,240,000</b>	<b>\$ 441,000</b>	<b>\$ 19,827,181</b>	<b>\$ 283,500</b>	<b>\$ 450,000</b>	<b>\$ 84,795,940</b>	<b>\$ (7,934,500)</b>	<b>-8.6%</b>	
<b>Total University Sources</b>	<b>\$ 77,118,173</b>	<b>\$ 9,117,500</b>	<b>\$ 9,240,000</b>	<b>\$ 441,000</b>	<b>\$ 19,827,181</b>	<b>\$ 1,038,577</b>	<b>\$ 1,700,000</b>	<b>\$ 118,482,431</b>	<b>\$ (9,439,903)</b>	<b>-7.4%</b>	
<b>FY 2020-21 Uses</b>											
Instruction	\$ 30,551,892	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 30,551,892	\$ (1,668,922)	-5.2%	
Research and Public Service	905,183	-	-	-	-	-	-	905,183	(415,715)	-31.5%	
Academic Support	6,295,442	-	-	-	-	-	-	6,295,442	(2,573,807)	-29.0%	
Student Services	8,073,063	-	-	-	-	-	-	8,073,063	(890,962)	-9.9%	
Institutional Support	9,839,564	-	-	-	-	-	-	9,839,564	(570,487)	-5.5%	
Operation and Maintenance of Plant	4,556,767	-	-	-	4,612,341	-	-	9,169,108	(677,450)	-6.9%	
Scholarships and Fellowships	16,896,262	-	-	-	-	-	-	16,896,262	(373,000)	-2.2%	
University Housing	-	6,856,362	-	-	-	-	-	6,856,362	459,665	7.2%	
Dining	-	-	7,179,968	-	-	-	-	7,179,968	(374,000)	-5.0%	
Parking	-	-	-	799,110	-	-	-	799,110	(23,424)	-2.8%	
Other Auxiliary Programs	-	-	-	-	19,092,115	-	-	19,092,115	(2,331,801)	-10.9%	
Subsidy To/(From) Other Auxiliary	-	2,261,138	2,060,032	(358,110)	(3,963,060)	-	-	-	-	n/a	
Museums and Cultural Services	-	-	-	-	-	734,124	-	734,124	-	0.0%	
Belmont	-	-	-	-	-	734,124	-	734,124	-	0.0%	
James Monroe Museum & Library	-	-	-	-	85,785	304,453	-	390,238	-	0.0%	
Subtotal - Museums/Cultural Services	-	-	-	-	85,785	1,038,577	-	1,124,362	-	0.0%	
Dahlgren Education/Research Center	-	-	-	-	-	-	1,700,000	1,700,000	-	0.0%	
<b>Total University Uses</b>	<b>\$ 77,118,173</b>	<b>\$ 9,117,500</b>	<b>\$ 9,240,000</b>	<b>\$ 441,000</b>	<b>\$ 19,827,181</b>	<b>\$ 1,038,577</b>	<b>\$ 1,700,000</b>	<b>\$ 118,482,431</b>	<b>\$ (9,439,903)</b>	<b>-7.4%</b>	



## 2019-20 Expenditures



## 2020-21 Expenditures



# **Tuition and Fees**



**University of Mary Washington**  
**2020-21 Tuition and Fees**

	In-State Students			Out-of-State Students		
	2019-20	2020-21	% Chg.	2019-20	2020-21	% Chg.
<b>Full-Time Undergraduates</b>						
<b>Living in University Housing</b>						
Tuition	\$8,678	\$8,678	0.0%	\$25,104	\$25,104	0.0%
Auxiliary Comprehensive Fee	4,532	4,896	8.0%	4,532	4,896	8.0%
Housing (1)	6,644	6,778	2.0%	6,644	6,778	2.0%
Board (2)	4,086	4,086	0.0%	4,086	4,086	0.0%
<b>Total</b>	<b>\$23,940</b>	<b>\$24,438</b>	<b>2.1%</b>	<b>\$40,366</b>	<b>\$40,864</b>	<b>1.2%</b>
<i>(1) Based on double-occupancy room in upper-class halls.</i>						
<i>(2) Based on 150 block / \$300 flex dollars plan.</i>						
<b>Full-Time Undergraduates</b>						
<b>Living in Private Housing</b>						
Tuition	\$8,678	\$8,678	0.0%	\$25,104	\$25,104	0.0%
Auxiliary Comprehensive Fee	4,532	4,896	8.0%	4,532	4,896	8.0%
<b>Total</b>	<b>\$13,210</b>	<b>\$13,574</b>	<b>2.8%</b>	<b>\$29,636</b>	<b>\$30,000</b>	<b>1.2%</b>
<b>Part-Time Undergraduates</b>						
<b>(Per credit hour rates)</b>						
Tuition	\$335	\$335	0.0%	\$1,016	\$1,016	0.0%
Auxiliary Comprehensive Fee	132	143	8.3%	132	143	8.3%
<b>Total</b>	<b>\$467</b>	<b>\$478</b>	<b>2.4%</b>	<b>\$1,148</b>	<b>\$1,159</b>	<b>1.0%</b>
<b>Part-Time Graduates</b>						
<b>(Per credit hour rates)</b>						
Tuition	\$482	\$482	0.0%	\$1,022	\$1,022	0.0%
Auxiliary Comprehensive Fee	132	143	8.3%	132	143	8.3%
<b>Total</b>	<b>\$614</b>	<b>\$625</b>	<b>1.8%</b>	<b>\$1,154</b>	<b>\$1,165</b>	<b>1.0%</b>
<b>MS Geospatial Analysis Program</b>						
<b>(Per credit hour rates)</b>						
Tuition	\$482	\$482	0.0%	\$1,022	\$1,022	0.0%
Auxiliary Comprehensive Fee	132	143	8.3%	132	143	8.3%
MSGA Laboratory/Equipment Fee	100	100	0.0%	100	100	0.0%
<b>Total</b>	<b>\$714</b>	<b>\$725</b>	<b>1.5%</b>	<b>\$1,254</b>	<b>\$1,265</b>	<b>0.9%</b>

*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.*

	In-State Students			Out-of-State Students		
	2019-20	2020-21	% Chg.	2019-20	2020-21	% Chg.
<b>University Residence Halls</b>						
<b>First-Year Rates</b>						
Single	\$8,112	\$8,274	2.0%	\$8,112	\$8,274	2.0%
Double	\$6,848	\$6,986	2.0%	\$6,848	\$6,986	2.0%
Triple	\$6,222	\$6,346	2.0%	\$6,222	\$6,346	2.0%
Quad	\$5,910	\$6,028	2.0%	\$5,910	\$6,028	2.0%
<b>Upper-Class Rates</b>						
Single	\$8,112	\$8,274	2.0%	\$8,112	\$8,274	2.0%
Double	\$6,644	\$6,778	2.0%	\$6,644	\$6,778	2.0%
Triple	\$6,220	\$6,344	2.0%	\$6,220	\$6,344	2.0%
Quad	\$5,910	\$6,028	2.0%	\$5,910	\$6,028	2.0%
<b>University Apartments</b>						
Single Room Apartment Rate	\$10,616	\$10,934	3.0%	\$10,616	\$10,934	3.0%
Double Room Apartment Rate	\$8,736	\$8,998	3.0%	\$8,736	\$8,998	3.0%
<b>Eagle Landing</b>						
Single Room Rate	\$10,646	\$10,966	3.0%	\$10,646	\$10,966	3.0%
Double Room Rate	\$8,910	\$9,178	3.0%	\$8,910	\$9,178	3.0%
<b>University Meal Plans*</b>						
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)	\$2,296	\$2,296	0.0%	\$2,296	\$2,296	0.0%
<b>Commuter Plans*</b>						
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)	\$660	\$660	0.0%	\$660	\$660	0.0%
5 Meals per Week Plan (no flex)	n/a	\$469	n/a	n/a	\$469	n/a
3 Meals per Week Plan (no flex)	n/a	\$265	n/a	n/a	\$265	n/a

\* 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.

**Summer Housing Rates**

	<u>Summer 2020</u>	<u>Summer 2021</u>	
	<u>Session / Week / Day</u>	<u>Session / Week / Day</u>	<u>Inc.</u>
Eagle Landing			
Single	\$1,330 / 266 / 38	\$1,370 / 274 / 39	3.0%
Double	\$1,084 / 217 / 32	\$1,084 / 217 / 32	3.0%
University Apartments			
Single	\$1,682 / 350 / 49	\$1,732 / 361 / 50	3.0%
Double	\$1,384 / 277 / 42	\$1,426 / 285 / 43	3.0%
Triple	\$1,247 / 250 / 37	\$1,284 / 258 / 38	3.0%
University Housing			
Single	\$1,201 / 240 / 34	\$1,225 / 245 / 35	2.0%
Double	\$903 / 180 / 26	\$921 / 184 / 27	2.0%

**Summer Meal Plans**

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%

**Summer Parking Decals**

Five Week Session	\$35	\$35	0.0%
Eight Week Session	\$55	\$55	0.0%
Ten Week Session	\$70	\$70	0.0%

	In-State Students			Out-of-State Students		
	2019-20	2020-21	% Chg.	2019-20	2020-21	% Chg.
<b>Other Undergraduate/Graduate Fees and Charges</b>						
Undergraduate overload fee <i>(per credit hour over 18 semester hrs.)</i>	\$335	\$335	0.0%	\$1,016	\$1,016	0.0%
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			
Returned Check Fee	\$50	\$50	0.0%	\$50	\$50	0.0%
<b>Housing Fees</b>						
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%
<b>Music - Private lessons</b>						
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%
<b>Equestrian Fee (per semester)</b>						
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  
**2019-20**

Rank	IS Commuter*		OS Commuter*		Room & Board		IS Total		OS Total	
	1	W&M	\$23,628	UVA	\$49,962	W&M	\$12,926	W&M	\$36,554	UVA
2	VMI	\$19,118	W&M	\$46,854	CNU	\$11,760	VMI	\$28,884	W&M	\$59,780
3	UVA	\$16,632	VMI	\$45,962	GMU	\$11,705	UVA	\$28,335	VMI	\$55,728
4	CNU	\$14,924	GMU	\$36,024	UVA	\$11,703	CNU	\$26,684	GMU	\$47,729
5	VCU	\$14,596	VCU	\$35,904	LU	\$11,668	VCU	\$25,419	VCU	\$46,727
6	VT	\$13,691	VT	\$32,835	VSU	\$11,554	LU	\$25,188	VT	\$42,177
7	LU	\$13,520	ODU	\$31,180	JMU	\$10,938	GMU	\$24,269	ODU	\$42,048
8	<b>UMW</b>	<b>\$13,210</b>	<b>UMW</b>	<b>\$29,636</b>	ODU	\$10,868	<b>UMW</b>	<b>\$23,940</b>	LU	\$41,168
9	GMU	\$12,564	LU	\$29,480	NSU	\$10,844	JMU	\$23,144	<b>UMW</b>	<b>\$40,366</b>
10	JMU	\$12,206	JMU	\$29,106	VCU	\$10,823	VT	\$23,033	JMU	\$40,044
11	RU	\$11,350	UVA-W	\$28,808	UVA-W	\$10,751	ODU	\$21,888	UVA-W	\$39,559
12	ODU	\$11,020	CNU	\$27,790	<b>UMW</b>	<b>\$10,730</b>	UVA-W	\$21,003	CNU	\$39,550
13	UVA-W	\$10,252	RU	\$23,432	VMI	\$9,766	RU	\$20,987	RU	\$33,069
14	NSU	\$9,622	NSU	\$21,550	RU	\$9,637	VSU	\$20,698	VSU	\$32,453
15	VSU	\$9,154	VSU	\$20,909	VT	\$9,342	NSU	\$20,466	NSU	\$32,394

\*Includes tuition and all mandatory fees.

For UVA, W&M and JMU, 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 2019-20 Tuition and Fee Report\_August 2019

# **Glossary**

# University of Mary Washington 2020-21 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.

**Auxiliary 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).

**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.

**Parking Decals:** A fee charged to students for parking in designated lots on campus.

**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).

**Auxiliary 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, or 85.

Meal plans are also available to commuter students, including 30 and 5 meal block and per week 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.