University of Connecticut
Office of the Vice President and Chief Financial Officer

December 19, 2011

TO: Members of the Board of Trustees

FROM: Peter J. Nicholls
Provost and Executive Vice President for Academic Affairs

Richard D. Gray
Vice President and Chief Financial Officer

RE: Fiscal Years 2013-2016 Institutional Fees (Tuition, Room, Board) for the University of Connecticut, Storrs and Regional Campuses

RECOMMENDATION:

That the Board of Trustees approve tuition increases for Fiscal Years 2013-2016 of approximately 5.5%, 5.8%, 6.0% and 6.3% respectively based upon an annual increase in the state appropriation of at least 0.5% (if there is no annual increase or decrease in the state appropriation, the Board of Trustees approve tuiton increases for Fiscal Years 2013-2016 of 6.0%, 6.3%, 6.5% and 6.8% respectively); room increases for Fiscal Years 2013-2016 of 3% per year for undergraduate students and 4% per year for graduate students; and board increases for Fiscal Years 2013-2016 of 3% per year. If the State appropriation decreases or the current fiscal climate worsens, the University may revisit the approved tuition increase amounts.

BACKGROUND:

The University has an established student fee review process that categorizes the fees as follows: (1.) Institutional Fees, which require central administrative approval, such as Tuition, Room, Board, Infrastructure Maintenance Fee and self-supporting programs; (2.) Academic Materials Fees, which are for consumables and instructional materials that are specific to a particular course or major; and (3.) Student Fees, which include the General University Fee and student activity and service fees. Senior Management charged permanent committees with promoting a fee structure for the academic and student fees that supports excellence, provides comprehensive procedures, and is uniform without sacrificing efficiency and flexibility. These Institutional Fees – tuition, room and board adjustments have been proposed by the University leadership.

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Based upon the need to remain competitive and to lower the student to faculty ratio, the University has developed a four year faculty hiring plan. The plan includes hiring 290 faculty and lowering the student to faculty ratio from 18:1 to 15:1. Along with the proposed tuition increases of 5.5%, 5.8%, 6.0% and 6.3% over the FY 2013-2016 timeframe, the plan includes funding from an increased state appropriation of 0.5% per year ($4.4M by FY16) and from other University sources ($6.0M by FY16). If the state appropriation is not increased, the tuition increases necessary for this faculty hiring plan would be 6.0%, 6.3%, 6.5% and 6.8% over the FY 2013-2016 timeframe. In addition, this plan assumes that the state will fully fund the collective bargaining increases for General Fund employees in Fiscal Years 2014-2016. If these funding levels are not attained or the current fiscal climate worsens, the University may revisit the approved tuition increase amounts.

Approving this four year proposal allows both students and parents to plan for the cost of an education at the University. The budget that forms the basis of this plan continues the University's strong commitment to funding financial aid at levels that will allow substantial support for need based assistance to talented students.

Room increases of 3% per year for undergraduate students and 4% per year for graduate students and Board increases of 3% per year are based on the operational needs of residential life and dining services. These increases are projected to generate sufficient revenue to support operations, continue some deferred maintenance programs, and some equipment replacement/maintenance. If the University's priorities change for these operations, we may revisit the approved rate increases.

See attached schedule for summary of recommended tuition, room and board rates.

Attachment

University of Connecticut (Storrs & Regionals)

Summary of Recommended Institutional Fees

Fiscal Years 2013-2016

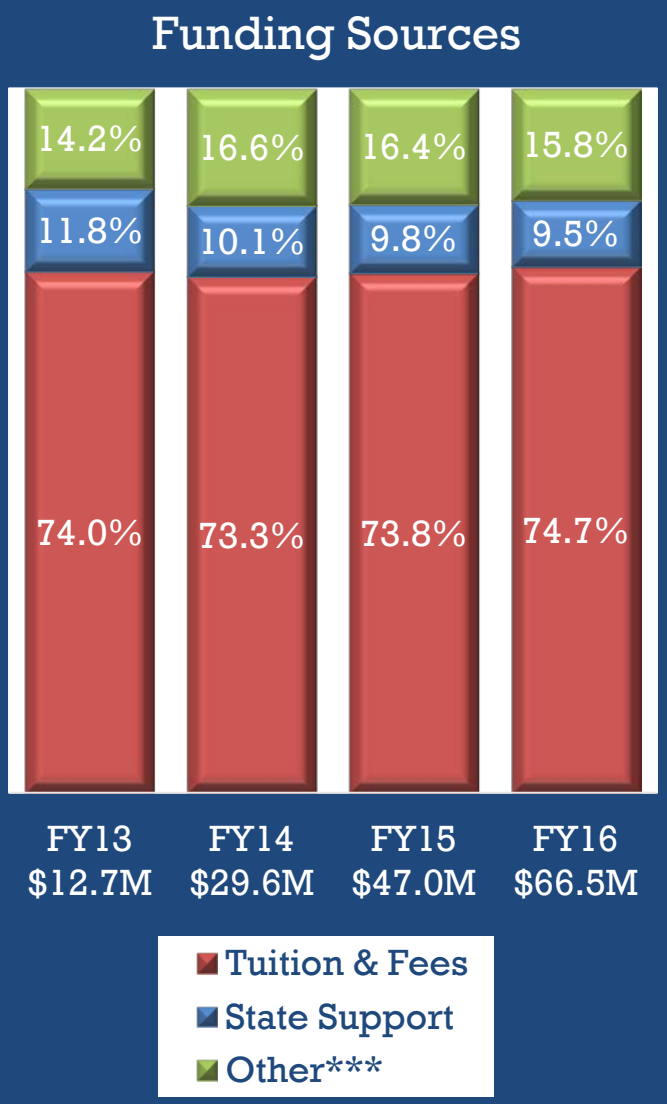
Institutional fees require central administrative review and approval. These budgets are largely driven by what it takes to run the operation (including payment of debt service). These increases are proposed by the University leadership.

	Annual Rates								
Tuition*	**FY12**	**FY13 Proposed**	**% Increase**	**FY14 Proposed**	**% Increase**	**FY15 Proposed**	**% Increase**	**FY16 Proposed**	**% Increase**
Undergraduate - In-State	$8,256	$8,712	5.52%	$9,216	5.79%	$9,768	5.99%	$10,368	6.14%
Undergraduate - Out-of-State	$25,152	$26,544	5.53%	$28,080	5.79%	$29,760	5.98%	$31,608	6.21%
Graduate - In-State	$10,224	$10,782	5.46%	$11,394	5.68%	$12,078	6.00%	$12,834	6.26%
Graduate - Out-of-State	$26,532	$27,990	5.50%	$29,592	5.72%	$31,356	5.96%	$33,300	6.20%
Room - Undergraduate	$5,918	$6,096	3.01%	$6,278	2.99%	$6,466	2.99%	$6,660	3.00%
Room - Graduate	$6,972	$7,250	3.99%	$7,540	4.00%	$7,842	4.01%	$8,156	4.00%
Board - Ultimate Meal Plan	$5,132	$5,284	2.96%	$5,444	3.03%	$5,608	3.01%	$5,776	3.00%
Board - Value Meal Plan	$4,898	$5,044	2.98%	$5,196	3.01%	$5,352	3.00%	$5,512	2.99%
Board - Custom Meal Plan	$4,646	$4,784	2.97%	$4,928	3.01%	$5,076	3.00%	$5,228	2.99%

*If there is no annual increase in the state appropriation, the tuition increases would be as follows:

Undergraduate - In-State	$8,256	$8,760	6.10%	$9,312	6.30%	$9,912	6.44%	$10,584	6.78%
Undergraduate - Out-of-State	$25,152	$26,640	5.92%	$28,296	6.22%	$30,120	6.45%	$32,136	6.69%
Graduate - In-State	$10,224	$10,836	5.99%	$11,520	6.31%	$12,276	6.56%	$13,104	6.74%
Graduate - Out-of-State	$26,532	$28,116	5.97%	$29,880	6.27%	$31,824	6.51%	$33,966	6.73%

Four Year Faculty Hiring Plan* Option 1



FY	# of Faculty**	Student Faculty Ratio	Tuition Increase	State Approp Increase	Other Sources
13	70	17.1	5.50%	0.5% $1.0M	$1.5M
14	90	16.2	5.75%	0.5% $2.1M	$3.0M
15	65	15.6	6.00%	0.5% $3.2M	$4.5M
16	65	15.0	6.25%	0.5% $4.4M	$6.0M

*Assumes that State will fully fund collective bargaining increases in FY14-FY16
**Number of additional faculty this tuition increase enables UConn to hire
***For example: philanthropy, summer and online courses, further cuts to non-faculty, non-bargaining personnel, shutting down institutes/centers as appropriate, exploring more executive education programs, royalty & patent income, corporate partnerships

UCONN

Option 1
FY13 – FY16 Proposed Increases for In-State Undergraduate Students

In-State Undergraduate	FY13	FY14	FY15	FY16
Tuition	$8,712	$9,216	$9,768	$10,368
Other Fees	2,530	2,590	2,676	2,762
Room - Double	6,096	6,278	6,466	6,660
Board - Value Plan	5,044	5,196	5,352	5,512
Total	$22,382	$23,280	$24,262	$25,302
Increment	$896	$898	$982	$1,040
Percentage	**4.2%**	**4.0%**	**4.2%**	**4.3%**

UCONN

Option 1
FY13 – FY16 Proposed Increases for Out-of-State Undergraduate Students

Out-of-State Undergraduate	FY13	FY14	FY15	FY16
Tuition	$26,544	$28,080	$29,760	$31,608
Other Fees	2,530	2,590	2,676	2,762
Room - Double	6,096	6,278	6,466	6,660
Board - Value Plan	5,044	5,196	5,352	5,512
Total	$40,214	$42,144	$44,254	$46,542
Increment	$1,832	$1,930	$2,110	$2,288
Percentage	**4.8%**	**4.8%**	**5.0%**	**5.2%**

UCONN

Option 1
FY13 – FY16 Proposed Increases for In-State Graduate Students

In-State Graduate	FY13	FY14	FY15	FY16
Tuition	$10,782	$11,394	$12,078	$12,834
Other Fees	2,004	2,046	2,114	2,182
Room	7,250	7,540	7,842	8,156
Board - Value Plan	5,044	5,196	5,352	5,512
Total	$25,080	$26,176	$27,386	$28,684
Increment	$1,080	$1,096	$1,210	$1,298
Percentage	**4.5%**	**4.4%**	**4.6%**	**4.7%**

UCONN

Option 1
FY13 – FY16 Proposed Increases for Out-of-State Graduate Students

Out-of-State Graduate	FY13	FY14	FY15	FY16
Tuition	$27,990	$29,592	$31,356	$33,300
Other Fees	2,004	2,046	2,114	2,182
Room	7,250	7,540	7,842	8,156
Board - Value Plan	5,044	5,196	5,352	5,512
Total	$42,288	$44,374	$46,664	$49,150
Increment	$1,980	$2,086	$2,290	$2,486
Percentage	**4.9%**	**4.9%**	**5.2%**	**5.3%**

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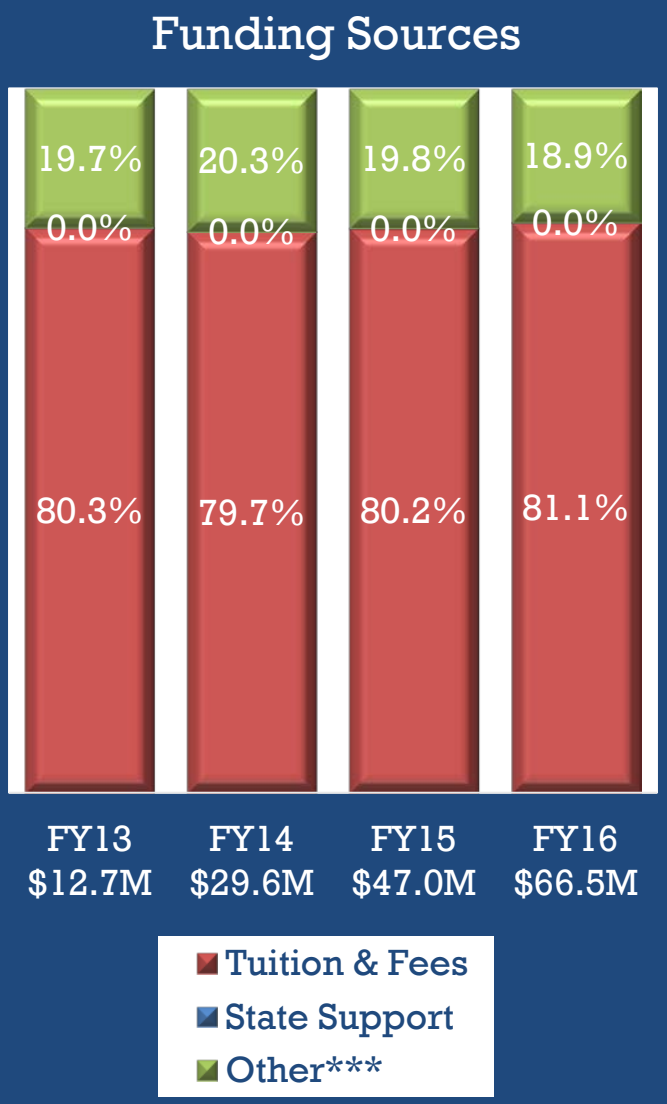
Four Year Faculty Hiring Plan* Option 2



FY	# of Faculty**	Student Faculty Ratio	Tuition Increase	State Approp Increase	Other Sources
13	70	17.1	6.00%	$0	$1.5M
14	90	16.2	6.25%	$0	$3.0M
15	65	15.6	6.50%	$0	$4.5M
16	65	15.0	6.75%	$0	$6.0M

*Assumes that State will fully fund collective bargaining increases in FY14-FY16
**Number of additional faculty this tuition increase enables UConn to hire
***For example: philanthropy, summer and online courses, further cuts to non-faculty, non-bargaining personnel, shutting down institutes/centers as appropriate, exploring more executive education programs, royalty & patent income, corporate partnerships

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Option 2
FY13 – FY16 Proposed Increases for In-State Undergraduate Students

In-State Undergraduate	FY13	FY14	FY15	FY16
Tuition	$8,760	$9,312	$9,912	$10,584
Other Fees	2,530	2,590	2,676	2,762
Room - Double	6,096	6,278	6,466	6,660
Board - Value Plan	5,044	5,196	5,352	5,512
Total	$22,430	$23,376	$24,406	$25,518
Increment	$944	$946	$1,030	$1,112
Percentage	4.4%	4.2%	4.4%	4.6%

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Option 2
FY13 – FY16 Proposed Increases for Out-of-State Undergraduate Students

Out-of-State Undergraduate	FY13	FY14	FY15	FY16
Tuition	$26,640	$28,296	$30,120	$32,136
Other Fees	2,530	2,590	2,676	2,762
Room - Double	6,096	6,278	6,466	6,660
Board - Value Plan	5,044	5,196	5,352	5,512
Total	$40,310	$42,360	$44,614	$47,070
Increment	$1,928	$2,050	$2,254	$2,456
Percentage	5.0%	5.1%	5.3%	5.5%

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Option 2
FY13 – FY16 Proposed Increases for In-State Graduate Students

In-State Graduate	FY13	FY14	FY15	FY16
Tuition	$10,836	$11,520	$12,276	$13,104
Other Fees	2,004	2,046	2,114	2,182
Room	7,250	7,540	7,842	8,156
Board - Value Plan	5,044	5,196	5,352	5,512
Total	$25,134	$26,302	$27,584	$28,954
Increment	$1,134	$1,168	$1,282	$1,370
Percentage	4.7%	4.7%	4.9%	5.0%

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Option 2
FY13 – FY16 Proposed Increases for Out-of-State Graduate Students

Out-of-State Graduate	FY13	FY14	FY15	FY16
Tuition	$28,116	$29,880	$31,824	$33,966
Other Fees	2,004	2,046	2,114	2,182
Room	7,250	7,540	7,842	8,156
Board - Value Plan	5,044	5,196	5,352	5,512
Total	$42,414	$44,662	$47,132	$49,816
Increment	$2,106	$2,248	$2,470	$2,684
Percentage	5.2%	5.3%	5.5%	5.7%

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In-State Tuition & Mandatory Fees for Top 25 Public Universities

Public Schools	US News Public Rank	FY11-FY12 Change	FY08-FY12 Change
Washington	10	20.7%	69.6%
UCLA	2	17.7%	80.3%
UC Berkeley	1	17.3%	79.2%
UC Irvine	13	16.8%	73.7%
UC San Diego	8	16.5%	77.6%
UC Santa Barbara	10	16.1%	72.2%
UC Davis	9	15.7%	70.9%
Florida	19	12.1%	67.9%
Georgia Tech	7	10.7%	71.1%
Virginia	2	8.9%	36.2%
Georgia	23	8.4%	68.5%
Pittsburgh	19	8.0%	25.3%
William & Mary	6	7.7%	43.3%
Wisconsin	10	7.6%	34.5%
Minnesota	25	6.7%	31.7%
Michigan	4	6.7%	20.9%
Illinois	13	5.7%	24.3%
North Carolina	5	5.1%	31.2%
Penn State	13	4.8%	24.4%
Purdue	23	4.5%	27.8%
Texas	13	4.0%	27.7%
Ohio State	17	3.3%	12.2%
Clemson	25	3.3%	24.7%
Maryland	17	2.8%	8.6%
UConn	19	2.4%	20.7%
Rutgers	25	1.4%	19.4%
Texas A&M	19	0.4%	14.8%

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Out-of-State Tuition & Mandatory Fees for Top 25 Public Universities

Public Schools	US News Public Rank	FY11-FY12 Change	FY08-FY12 Change
Washington	10	10.6%	27.9%
Minnesota	25	9.2%	23.2%
Virginia	2	9.1%	30.5%
North Carolina	5	8.5%	27.9%
UC San Diego	8	8.2%	33.5%
William & Mary	6	6.6%	32.5%
UCLA	2	5.7%	33.4%
Rutgers	25	5.7%	28.0%
UC Irvine	13	5.5%	32.5%
UC Santa Barbara	10	5.4%	32.6%
UC Davis	9	5.4%	32.5%
Wisconsin	10	4.9%	18.6%
Michigan	4	4.9%	20.7%
Maryland	17	4.8%	17.2%
Ohio State	17	4.3%	15.7%
Texas	13	4.1%	32.4%
Pittsburgh	19	3.9%	14.1%
Purdue	23	3.8%	24.4%
Clemson	25	3.8%	30.6%
Georgia Tech	7	3.5%	19.2%
Penn State	13	3.5%	18.4%
Georgia	23	2.7%	33.6%
Illinois	13	2.7%	11.0%
UConn	19	2.6%	21.0%
Florida	19	2.2%	56.6%
UC Berkeley	1	1.1%	33.3%
Texas A&M	19	0.2%	45.8%

UConn's Affordability
FY12 Tuition, Fees, Room & Board

		In-State* Tuition & Fees	Out-of-State Tuition & Fees	In-State Total Cost	Out-of-State Total Cost
1	Dartmouth College	$42,996	$42,996	$55,365	$55,365
2	Johns Hopkins University	$42,280	$42,280	$55,242	$55,242
3	Brown University	$42,230	$42,230	$53,136	$53,136
4	Washington University in St Louis	$41,992	$41,992	$55,366	$55,366
5	Northwestern University	$41,983	$41,983	$54,868	$54,868
6	Duke University	$41,958	$41,958	$54,618	$54,618
7	University of Pittsburgh-Pittsburgh Campus	$16,132	$25,540	$26,232	$35,640
8	Pennsylvania State University-Main Campus	$15,984	$28,066	$25,404	$37,486
9	University of Illinois at Urbana-Champaign	$13,558	$27,700	$23,638	$37,780
10	Clemson University	$12,668	$28,826	$20,238	$36,396
11	**University of Connecticut**	**$10,670**	**$27,566**	**$21,720**	**$38,616**
12	Purdue University-Main Campus	$9,478	$27,646	$17,480	$35,648
13	University of Georgia	$9,472	$27,682	$18,180	$36,390
14	University of Florida	$5,656	$27,933	$14,456	$36,733

* List sorted by In-State rates highest to lowest.

University of Connecticut (Storrs)
Division of Student Affairs- Department of Residential Life
Room Fee - Fiscal Years 2013, 2014, 2015 and 2016

I. Proposed Action

A. Description of Room Fee: A 3% increase in FY 2013 through FY 2016 on the double room fee, and a 4% increase in FY 2013 through FY 2016 on all other room fees as noted below.

B. Description of Recommended Revision: The recommended revision increases the double room fee as follows: $178 year/$89 semester in FY 2013, $182 year/$91 semester in FY 2014, $188 year/$94 semester in FY 2015, and $194 year/$97 semester in FY 2016. Other room fee rates are recommended to increase by 4% for FY 2013 through FY 2016 including graduate rooms, Husky Village, Hilltop Apartments and Charter Oak Apartments.

C. Basis of Requested Revision: The projected fee increases are needed to meet the cost of inflation, continue deferred maintenance programs, provide for equipment, and to continue routine furniture replacement.

D. Students Affected: The increases would apply to all students living in the University residential areas.

E. Proposed Dates of Implementation: Fall 2012 and each fall thereafter through fall 2015.

II. Analysis

A. Fiscal Need for Revision: The Department of Residential Life operates as a self-supporting auxiliary operation. Therefore, it is necessary for the Department to generate a sufficient amount of revenue to support its operation, continue deferred maintenance programs, and to continue providing inclusive laundry services to students in the traditional residence halls.

B. Impact on Program and Clients: Failure to implement the fee requests would result in a delay in planned deferred maintenance projects and furniture replacement.

C. Comparative Student Costs: See attached.

D. Student Involvement in Fee Revision Proposal: Two public forums were held to present the rate increases as defined.

Residence Halls	Undergraduate Double Room	Undergraduate Single Room	Graduate Room	Suite Triples
FY 2012	$5,918	$6,972	$6,972	$6,256
FY 2013	$6,096	$7,250	$7,250	$6,506
FY 2014	$6,278	$7,540	$7,540	$6,766
FY 2015	$6,466	$7,842	$7,842	$7,036
FY 2016	$6,660	$8,156	$8,156	$7,318
Apartments & Husky Village	**Hilltop & Charter Oak 4 Bedroom**	**Hilltop & Charter Oak 2 Bedroom**	**Hilltop 1 Bedroom**	**Husky Village Double Room**
FY 2012	$9,590	$7,432	$7,432	$6,972
FY 2013	$9,974	$7,730	$7,730	$7,250
FY 2014	$10,372	$8,040	$8,040	$7,540
FY 2015	$10,786	$8,362	$8,362	$7,842
FY 2016	$11,218	$8,696	$8,696	$8,156

UConn's Affordability
FY12 Tuition, Fees, Room & Board

		Room*	In-State Total Cost	Out-of-State Total Cost
1	University of Illinois at Urbana-Champaign	$10,080	$23,638	$37,780
2	Washington University in St Louis	$8,374	$55,366	$55,366
3	Purdue University-Main Campus	$8,002	$17,480	$35,648
4	Northwestern University	$7,635	$54,868	$54,868
5	Johns Hopkins University	$7,408	$55,242	$55,242
6	Dartmouth College	$7,395	$55,365	$55,365
7	Duke University	$7,110	$54,618	$54,618
8	Brown University	$6,004	$53,136	$53,136
9	**University of Connecticut**	**$5,918**	**$21,720**	**$38,616**
10	University of Pittsburgh-Pittsburgh Campus	$5,100	$26,232	$35,640
11	University of Georgia	$4,916	$18,180	$36,390
12	Pennsylvania State University-Main Campus	$4,770	$25,404	$37,486
13	University of Florida	$4,548	$14,456	$36,733
14	Clemson University	$4,320	$20,238	$36,396

* List sorted by Room rates highest to lowest. Room rates reflect the standard double rate.

University of Connecticut (Storrs)
Division of Student Affairs
Department of Dining Services
Board Fee - Fiscal Years 2013, 2014, 2015 and 2016

I. Proposed Action

A. Description of Board Fee: A fee increase of 3.0% each year for FY 2013 through FY 2016 as noted below.

B. Description of Recommended Revision: To increase the board fee in FY 2013 and each fiscal year through FY 2016 as follows:
Ultimate: Unlimited meals, 500 points, 35 flex passes (per semester)-$152 year/$76 semester in FY 2013, $160 year/$80 semester in FY 2014, $164 year/$82 semester in FY 2015, and $168/$84 semester in FY 2016
Value: Unlimited meals, 200 points, 40 flex passes (per semester)-$146 year/$73 semester in FY 2013, $152 year/$76 semester in FY 2014, $156 year/$78 semester in FY 2015, and $160 year/$80 semester in FY 2016
Custom: Unlimited meals, 75 flex passes (per semester)-$138 year/$69 semester in FY 2013, $144 year/$72 semester in FY 2014, $148 year/$74 semester in FY 2015 and $152 year/$76 semester in FY 2016.

C. Basis of Requested Revision: 3% increases in each year beginning in FY 2013 through FY 2016 are needed to meet the cost of inflation, renovations to older dining facilities, and equipment maintenance and replacement.

D. Students Affected: The increases would apply to all students living in the University undergraduate residence halls and any graduate or commuter student who chooses to purchase a meal plan.

E. Proposed Dates of Implementation: Fall 2012 and each fall thereafter through fall 2015.

II. Analysis

A. Fiscal Need for Fee Revision: The Department of Dining Services is a self-supporting auxiliary operation. Therefore, it is necessary for the Department to generate sufficient revenue to support its operation.

B. Impact on Program and Clients: Failure to implement the fee requests would result in a reduction of some student services.

C. Comparative Student Costs: See attached.

D. Student Involvement in Fee Revision Proposal: Two public forums were held to present the rates as defined.

Meal Plans	Ultimate	Value	Custom
FY 2012	$5,132	$4,898	$4,646
FY 2013	$5,284	$5,044	$4,784
FY 2014	$5,444	$5,196	$4,928
FY 2015	$5,608	$5,352	$5,076
FY 2016	$5,776	$5,512	$5,228

Ultimate = unlimited meals, 500 points, 35 flex passes
Value = unlimited meals, 200 points, 40 flex passes
Custom = unlimited meals, 75 flex passes

UConn's Affordability
FY12 Tuition, Fees, Room & Board

		Board*	In-State Total Cost	Out-of-State Total Cost
1	Johns Hopkins University	$5,554	$55,242	$55,242
2	Duke University	$5,550	$54,618	$54,618
3	Northwestern University	$5,250	$54,868	$54,868
4	**University of Connecticut**	**$5,132**	**$21,720**	**$38,616**
5	Washington University in St Louis	$5,000	$55,366	$55,366
6	University of Pittsburgh-Pittsburgh Campus	$5,000	$26,232	$35,640
7	Dartmouth College	$4,974	$55,365	$55,365
8	Brown University	$4,902	$53,136	$53,136
9	Pennsylvania State University-Main Campus	$4,650	$25,404	$37,486
10	University of Florida	$4,252	$14,456	$36,733
11	University of Georgia	$3,792	$18,180	$36,390
12	Clemson University	$3,250	$20,238	$36,396
13	University of Illinois at Urbana-Champaign**		$23,638	$37,780
14	Purdue University-Main Campus**		$17,480	$35,648

* List sorted by Board rates highest to lowest. Board rates reflect the most expensive plan available.
**These schools include the cost of the meal plan in the housing fees.