

January 26, 2010

MEMORANDUM

TO: Board of Governors
FROM: Rob Nelson *RN*
SUBJECT: Review of Tuition and Fees

The attached package contains information to help you prepare for the upcoming February Board of Governors' meeting. Your Board notebook with the official tuition and fees recommendation will be mailed to you next week. In the meantime, we are providing you with information to facilitate your review and analysis. I encourage you to email or call me with your questions and comments.

As part of its budget deliberations, the 2009 General Assembly set tuition rates for the University for 2010-11 that increase all existing rates by the lesser of \$200 or 8%. This increase would apply to both resident and nonresident students at both the undergraduate and graduate levels. While the new revenues from our campus-initiated tuition increases remain on the campuses, the revenues from these legislatively mandated tuition increases would flow directly into the State General Fund.

Based on his conversations with legislative leadership, the President is going to recommend that the Board ask the General Assembly to consider an ALTERNATIVE to its action on tuition when it reconvenes in May. Chancellors have submitted their recommendations for 2010-11, consistent with the Board's Four-Year Plan, for campus-based tuition increases and fee increases, for consideration by the Board at its February meeting.

Since January 4, UNC-GA staff has been reviewing the proposed tuition and fee requests for the 2010-11 academic year. In addition to a thorough review of proposals by Finance Staff, a review committee with representatives from the Divisions of Academic Affairs, Finance, and Information Resources has considered each request, reviewing actual expenditures, projected expenditures, and available cash balances.

The increases requested and submitted by campuses are consistent with the requirements of your policy and your four-year plan, including the maximum allowable campus-based increases for resident, undergraduate tuition, and the maximum rate of increase for general fees (6.5%).

All requests for increasing tuition and fees were accompanied by explicit plans for the use of the increased revenue, and the campuses have followed the President's request to set aside at least 50% of new tuition revenues for need-based financial aid, at least 25% to improve graduation and retention rates, and the balance for other critical needs.

MEMO TO: Board of Governors
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Attached you will find the following information.

Section I

- FY 2010-11 Tuition and Fee Summary Data

Section II

- FY 2009-10 Tuition and Fees Data for UNC Peer Institutions

Section III

- Explanations for Campus-Initiated Tuition increases not subject to the BOG Four-Year Plan

Section IV

- “Four Families” Charts

Section I

Fiscal Year 2010-11 Tuition and Fee Summary Data

The attached worksheets reflect proposed tuition and fee increases for the 2010-11 academic year. Tuition and fee increases are consistent with the BOG four-year plan, which requires undergraduate resident tuition and general fee increases (excluding debt service) to not exceed 6.5%.

The University of North Carolina
 Tuition and Fees Applicable to All Regular Full-Time
Undergraduate Resident Students - Carnegie Classification
 Proposed 2010-11

	CHANGES for 2010-11											Without Debt Service		With Debt Service	
	2009-10 Tuition Resident	Total 2009-10 General Fees	2009-10 Debt Service Fee	2009-10 Resident Tuition and Fees	Res. U/G Tuition Cap	Campus Initiated Tuition Residents	Increase %	Required General Fees \$	Increase %	Debt Service \$	TOTAL 2010-11 Increases Residents	Tuition & Fees without Debt Service for 2010-11 Resident	% Increase over 2009-10 Resident	Tuition & Fees with Debt Service for 2010-11 Resident	% Increase over 2009-10 Resident
NCSU	3,953.00	1,206.00	237.00	5,396.00	6.5%	150.00	3.8%	14.30	1.2%	83.00	247.30	5,323.30	3.2%	5,643.30	4.6%
UNC-CH	3,865.00	1,404.66	180.50	5,450.16	6.5%	200.00	5.2%	65.98	4.7%	27.35	293.33	5,535.64	5.0%	5,743.49	5.4%
ECU	2,491.00	1,481.00	318.00	4,290.00	6.5%	90.00	3.6%	70.00	4.7%	0.00	160.00	4,132.00	4.0%	4,450.00	3.7%
NCA&T	1,994.00	1,444.75	161.00	3,599.75	6.5%	110.00	5.5%	93.25	6.5%	0.00	203.25	3,642.00	5.9%	3,803.00	5.6%
UNCC	2,516.00	1,475.00	365.00	4,356.00	6.5%	103.00	4.1%	60.00	4.1%	120.00	283.00	4,154.00	4.1%	4,639.00	6.5%
UNCG	2,590.00	1,324.00	272.00	4,186.00	6.5%	168.00	6.5%	86.00	6.5%	0.00	254.00	4,168.00	6.5%	4,440.00	6.1%
ASU	2,341.00	1,681.00	402.00	4,424.00	6.5%	152.00	6.5%	30.00	1.8%	100.00	282.00	4,204.00	4.5%	4,706.00	6.4%
FSU	1,905.00	1,152.00	95.00	3,152.00	6.5%	124.00	6.5%	75.00	6.5%	0.00	199.00	3,256.00	6.5%	3,351.00	6.3%
NCCU	2,264.00	1,477.21	120.00	3,861.21	6.5%	113.00	5.0%	70.21	4.8%	0.00	183.21	3,924.42	4.9%	4,044.42	4.7%
UNCP	2,060.00	1,425.00	170.00	3,655.00	6.5%	113.00	5.5%	41.00	2.9%	0.00	154.00	3,639.00	4.4%	3,809.00	4.2%
UNCW	2,565.00	1,599.80	708.00	4,872.80	6.5%	52.00	2.0%	5.60	0.4%	(20.00)	37.60	4,222.40	1.4%	4,910.40	0.8%
WCU	2,106.00	1,661.00	447.00	4,214.00	6.5%	137.00	6.5%	90.00	5.4%	(13.00)	214.00	3,994.00	6.0%	4,428.00	5.1%
WSSU	1,769.00	1,512.16	190.00	3,471.16	6.5%	115.00	6.5%	41.00	2.7%	0.00	156.00	3,437.16	4.8%	3,627.16	4.5%
UNCA	2,389.00	1,719.85	220.00	4,328.85	6.5%	155.00	6.5%	111.65	6.5%	0.00	266.65	4,375.50	6.5%	4,595.50	6.2%
ECSU	1,681.00	1,350.00	0.00	3,031.00	6.5%	109.00	6.5%	85.10	6.3%	0.00	194.10	3,225.10	6.4%	3,225.10	6.4%
UNCSA (1)	3,357.00	1,670.00	200.00	5,227.00	6.5%	200.00	6.0%	78.00	4.7%	0.00	278.00	5,305.00	5.5%	5,505.00	5.3%
Average	2,490.38	1,473.96	255.34	4,219.68	6.5%	130.69	5.2%	63.57	4.3%	18.58	212.84	4,158.60	4.9%	4,432.52	5.0%

(1) Does not include High School.

**The University of North Carolina
Tuition and Fees Applicable to All Regular Full-Time
Undergraduate Nonresident Students - Carnegie Classification
Proposed 2010-11**

	CHANGES for 2010-11											Without Debt Service		With Debt Service	
	2009-10 Tuition Nonresident	Total 2009-10 General Fees	2009-10 Debt Service Fee	Total 2009-10 Nonresident Tuition and Fees	Campus Initiated Tuition Nonres.	Increase %	Required General Fees \$	Increase %	Debt Service \$	TOTAL 2010-11 Increases Nonres.	Tuition & Fees without Debt Service for 2010-11 Nonres.	% Increase over 2009-10 Nonres.	Tuition & Fees with Debt Service for 2009-10 Nonres.	% Increase over 2009-10 Nonres.	
NCSU	16,438.00	1,206.00	237.00	17,881.00	200.00	1.2%	14.30	1.2%	83.00	297.30	1.2%	18,178.30	1.7%		
UNC-CH	21,753.00	1,404.66	180.50	23,338.16	927.00	4.3%	65.98	4.7%	27.35	1,020.33	4.3%	24,358.49	4.4%		
ECU	13,325.00	1,481.00	318.00	15,124.00	880.00	6.6%	70.00	4.7%	0.00	950.00	6.4%	16,074.00	6.3%		
NCA&T	11,436.00	1,444.75	161.00	13,041.75	110.00	1.0%	93.25	6.5%	0.00	203.25	1.6%	13,245.00	1.6%		
UNCC	13,128.00	1,475.00	365.00	14,968.00	538.00	4.1%	60.00	4.1%	120.00	718.00	4.1%	15,686.00	4.8%		
UNCG	14,351.00	1,324.00	272.00	15,947.00	168.00	1.2%	86.00	6.5%	0.00	254.00	1.6%	16,201.00	1.6%		
ASU	12,962.00	1,681.00	402.00	15,045.00	843.00	6.5%	30.00	1.8%	100.00	973.00	6.0%	16,018.00	6.5%		
FSU	12,248.00	1,152.00	95.00	13,495.00	245.00	2.0%	75.00	6.5%	0.00	320.00	2.4%	13,815.00	2.4%		
NCCU	12,333.00	1,477.21	120.00	13,930.21	617.00	5.0%	70.21	4.8%	0.00	687.21	5.0%	14,617.42	4.9%		
UNCP	11,267.00	1,425.00	170.00	12,862.00	113.00	1.0%	41.00	2.9%	0.00	154.00	1.2%	13,016.00	1.2%		
UNCW	13,447.00	1,599.80	708.00	15,754.80	269.00	2.0%	5.60	0.4%	(20.00)	254.60	1.8%	16,009.40	1.6%		
WCU	11,703.00	1,661.00	447.00	13,811.00	137.00	1.2%	90.00	5.4%	(13.00)	214.00	1.7%	14,025.00	1.5%		
WSSU	10,755.00	1,512.16	190.00	12,457.16	115.00	1.1%	41.00	2.7%	0.00	156.00	1.3%	12,613.16	1.3%		
UNCA	14,106.00	1,719.85	220.00	16,045.85	917.00	6.5%	111.65	6.5%	0.00	1,028.65	6.5%	17,074.50	6.4%		
ECSU	10,730.00	1,350.00	0.00	12,080.00	697.00	6.5%	85.10	6.3%	0.00	782.10	6.5%	12,862.10	6.5%		
UNCSA (1)	15,303.00	1,670.00	200.00	17,173.00	612.00	4.0%	78.00	4.7%	0.00	690.00	4.1%	17,863.00	4.0%		
Average	13,455.31	1,473.96	255.34	15,184.62	461.75	3.4%	63.57	4.4%	18.58	543.90	3.5%	15,728.52	3.5%		

(1) Does not include High School.

The University of North Carolina
 Tuition and Fees Applicable to All Regular Full-Time
Graduate Resident Students - Carnegie Classification
 Proposed 2010-11

	CHANGES for 2010-11											Without Debt Service		With Debt Service	
	2009-10 Tuition Resident	2009-10 Total Resident Tuition and Fees	2009-10 Debt Service Fee	Campus Initiated Tuition Residents	Increase %	Required General Fees \$	Increase %	Debt Service \$	TOTAL 2010-11 Increases Residents	Tuition & Fees without Debt Service for 2010-11 Resident	% Increase over 2009-10 Resident	Tuition & Fees with Debt Service for 2010-11 Resident	% Increase over 2009-10 Resident		
NCSU	4,408.00	1,206.00	237.00	200.00	4.5%	14.30	1.2%	83.00	297.30	5,828.30	3.8%	6,148.30	5.1%		
UNC-CH	5,413.00	1,392.86	180.50	200.00	3.7%	65.98	4.7%	27.35	293.33	7,071.84	3.9%	7,279.69	4.2%		
ECU	2,995.00	1,481.00	318.00	108.00	3.6%	70.00	4.7%	0.00	178.00	4,654.00	4.0%	4,972.00	3.7%		
NCA&T	2,266.00	1,444.75	161.00	125.00	5.5%	93.25	6.5%	0.00	218.25	3,929.00	5.9%	4,090.00	5.6%		
UNCC	2,919.00	1,475.00	365.00	120.00	4.1%	60.00	4.1%	120.00	300.00	4,574.00	4.1%	5,059.00	6.3%		
UNCG	3,044.00	1,324.00	272.00	198.00	6.5%	86.00	6.5%	0.00	284.00	4,652.00	6.5%	4,924.00	6.1%		
ASU	2,779.00	1,681.00	402.00	181.00	6.5%	30.00	1.8%	100.00	311.00	4,671.00	4.7%	5,173.00	6.4%		
FSU	2,255.00	1,152.00	95.00	147.00	6.5%	75.00	6.5%	0.00	222.00	3,629.00	6.5%	3,724.00	6.3%		
NCCU	2,936.00	1,426.04	120.00	147.00	5.0%	58.33	4.1%	0.00	205.33	4,567.37	4.7%	4,687.37	4.6%		
UNCP	2,159.00	1,425.00	170.00	113.00	5.2%	41.00	2.9%	0.00	154.00	3,738.00	4.3%	3,908.00	4.1%		
UNCW	2,949.00	1,599.80	708.00	59.00	2.0%	5.60	0.4%	(20.00)	44.60	4,613.40	1.4%	5,301.40	0.8%		
WCU	2,414.00	1,661.00	447.00	157.00	6.5%	90.00	5.4%	(13.00)	234.00	4,322.00	6.1%	4,756.00	5.2%		
WSSU	2,228.00	1,512.16	190.00	115.00	5.2%	41.00	2.7%	0.00	156.00	3,896.16	4.2%	4,086.16	4.0%		
UNCA	2,831.00	1,719.85	220.00	184.00	6.5%	111.65	6.5%	0.00	295.65	4,846.50	6.5%	5,066.50	6.2%		
ECSU	1,785.00	1,350.00	0.00	116.00	6.5%	85.10	6.3%	0.00	201.10	3,336.10	6.4%	3,336.10	6.4%		
UNCSA	3,996.00	1,670.00	200.00	200.00	5.0%	78.00	4.7%	0.00	278.00	5,944.00	4.9%	6,144.00	4.7%		
Average	2,961.06	1,470.03	255.34	148.13	5.2%	62.83	4.3%	18.58	229.54	4,642.04	4.9%	4,915.97	5.0%		

The University of North Carolina
 Tuition and Fees Applicable to All Regular Full-Time
Graduate Nonresident Students - Carnegie Classification
 Proposed 2010-11

	2009-10 Tuition Nonresident	CHANGES for 2010-11											Without Debt Service		With Debt Service	
		Total 2009-10 General Fees	2009-10 Debt Service Fee	2009-10 Total Nonresident Tuition & Fees	Campus Initiated Tuition Nonres.	Increase %	Required General Fees \$	Increase %	Debt Service Increases \$	TOTAL 2010-11 Increases Nonres.	Tuition & Fees without Debt Service for 2010-11 Nonres.	Increase over 2009-10 Nonres.	Tuition & Fees with Debt Service for 2010-11 Nonres.	Increase over 2009-10 Nonres.		
NCSU	16,456.00	1,206.00	237.00	17,899.00	200.00	1.2%	14.30	1.2%	83.00	297.30	1.2%	18,196.30	1.7%			
UNC-CH	19,811.00	1,392.86	180.50	21,384.36	532.00	2.7%	65.98	4.7%	27.35	625.33	2.8%	22,009.69	2.9%			
ECU	13,311.00	1,481.00	318.00	15,110.00	479.00	3.6%	70.00	4.7%	0.00	549.00	3.7%	15,659.00	3.6%			
NCA&T	11,851.00	1,444.75	161.00	13,456.75	125.00	1.1%	93.25	6.5%	0.00	218.25	1.6%	13,675.00	1.6%			
UNCC	13,326.00	1,475.00	365.00	15,166.00	546.00	4.1%	60.00	4.1%	120.00	726.00	4.1%	15,892.00	4.8%			
UNCG	14,524.00	1,324.00	272.00	16,120.00	198.00	1.4%	86.00	6.5%	0.00	284.00	1.8%	16,404.00	1.8%			
ASU	13,193.00	1,681.00	402.00	15,276.00	858.00	6.5%	30.00	1.8%	100.00	988.00	6.0%	16,264.00	6.5%			
FSU	11,942.00	1,152.00	95.00	13,189.00	239.00	2.0%	75.00	6.5%	0.00	314.00	2.4%	13,503.00	2.4%			
NCCU	13,395.00	1,426.04	120.00	14,941.04	670.00	5.0%	58.33	4.1%	0.00	728.33	4.9%	15,669.37	4.9%			
UNCP	11,486.00	1,425.00	170.00	13,081.00	113.00	1.0%	41.00	2.9%	0.00	154.00	1.2%	13,235.00	1.2%			
UNCW	13,663.00	1,599.80	708.00	15,970.80	273.00	2.0%	5.60	0.4%	(20.00)	258.60	1.8%	16,229.40	1.6%			
WCU	11,999.00	1,661.00	447.00	14,107.00	157.00	1.3%	90.00	5.4%	(13.00)	234.00	1.8%	14,341.00	1.7%			
WSSU	11,414.00	1,512.16	190.00	13,116.16	115.00	1.0%	41.00	2.7%	0.00	156.00	1.2%	13,272.16	1.2%			
UNCA	14,395.00	1,719.85	220.00	16,334.85	936.00	6.5%	111.65	6.5%	0.00	1,047.65	6.5%	17,382.50	6.4%			
ECSU	10,965.00	1,350.00	0.00	12,315.00	713.00	6.5%	85.10	6.3%	0.00	798.10	6.5%	13,113.10	6.5%			
UNCSA	15,869.00	1,670.00	200.00	17,739.00	634.00	4.0%	78.00	4.7%	0.00	712.00	4.1%	18,451.00	4.0%			
Average	13,600.00	1,470.03	255.34	15,325.37	424.25	3.1%	62.83	4.3%	18.58	505.66	3.2%	15,831.03	3.3%			

The University of North Carolina
Proposed Board-Approved Campus-Initiated Tuition Increase
Related Expenditures Plans for Additional Revenues Generated
FY 2010-11

FTE	ASU	ECU	ECSU	FSU	NCA&T	NCCU	NCSU	UNCA	UNC-CH	UNCC	UNCG	UNCP	UNCW	UNCSA	WCU	WSSU	Total
UG Residents	12,606	16,700	2,783	4,753	6,882	5,854	20,683	2,901	14,157	15,547	12,637	5,679	8,855	317	5,693	4,703	140,750
UG Nonresidents	1,103	2,556	461	371	733	648	1,414	330	2,923	1,752	781	282	1,500	425	284	469	16,032
Graduate Residents	823	4,422	71	463	1,874	1,609	3,486	19	7,168	2,465	2,684	699	770	54	674	316	27,597
Graduate Nonres.	166	271	4	33	180	101	2,068	0	2,315	811	370	16	112	71	114	20	6,652
Total Revenue	14,698	23,949	3,319	5,620	9,669	8,212	27,651	3,250	26,563	20,575	16,472	6,676	11,237	867	6,765	5,508	191,031

Revenues	ASU	ECU	ECSU	FSU	NCA&T	NCCU	NCSU	UNCA	UNC-CH	UNCC	UNCG	UNCP	UNCW	UNCSA	WCU	WSSU	Total
UG Residents	\$1,916,112	\$1,503,000	\$303,347	\$567,052	\$757,020	\$580,076	\$3,102,450	\$449,655	\$2,831,400	\$1,601,380	\$2,123,016	\$641,727	\$460,460	\$63,400	\$779,941	\$540,845	\$18,220,881
UG Nonresidents	929,829	2,249,280	321,317	90,895	80,630	356,541	282,800	302,610	2,709,621	942,374	131,208	31,866	403,500	260,100	38,908	53,935	9,185,414
Graduate Res.	148,963	477,576	8,236	68,061	234,250	230,690	697,200	3,496	1,433,600	295,755	531,432	78,987	45,430	10,800	105,818	36,340	4,406,634
Graduate Nonres.	142,428	129,809	2,852	7,887	22,500	65,024	413,600	0	1,231,580	443,036	73,260	1,808	30,576	45,014	17,898	2,300	2,629,572
Total Revenue	3,137,332	4,359,665	635,752	733,895	1,094,400	1,232,331	4,496,050	755,761	8,206,201	3,282,545	2,858,916	754,388	939,966	379,314	942,565	633,420	34,442,501

Expenditures	ASU	ECU	ECSU	FSU	NCA&T	NCCU	NCSU	UNCA	UNC-CH	UNCC	UNCG	UNCP	UNCW	UNCSA	WCU	WSSU	Total
Financial Aid	\$1,568,666	\$2,179,833	\$317,876	\$550,421	\$547,200	\$616,166	\$2,248,025	\$377,881	\$4,103,101	\$1,641,273	\$1,429,484	\$377,194	\$470,556	\$189,656	\$471,283	\$316,710	\$17,405,325
Student Retention	784,333	1,089,916	158,938	183,474	273,600	308,083	1,124,013	188,940	2,051,550	820,636	714,716	188,597	234,705	94,829	235,641	158,355	8,518,587
Other Critical Areas	784,333	1,089,916	158,938	0	273,600	308,082	1,124,012	188,940	2,051,550	820,636	714,716	188,597	234,705	94,829	235,641	158,355	8,518,587
Total	3,137,332	4,359,665	635,752	733,895	1,094,400	1,232,331	4,496,050	755,761	8,206,201	3,282,545	2,858,916	754,388	939,966	379,314	942,565	633,420	34,442,501

**The University of North Carolina
Proposed Board-Approved Campus-Initiated Tuition Increase
 Related Expenditures Plans for Additional Revenues Generated (Percentages)
 FY 2010-11**

FTE	ASU	ECU	ECSU	FSU	NCA&T	NCCU	NCSU	UNCA	UNC-CH	UNCC	UNCG	UNCP	UNCW	NCSA	WCU	WSSU	Total
UG Residents	86%	70%	84%	85%	71%	71%	75%	89%	53%	76%	77%	85%	79%	37%	84%	85%	74%
UG Nonresidents	8%	11%	14%	7%	8%	8%	5%	10%	11%	9%	5%	4%	13%	49%	4%	9%	8%
Graduate Residents	6%	18%	2%	8%	19%	20%	13%	1%	27%	12%	16%	10%	7%	6%	10%	6%	14%
Graduate Nonres.	1%	1%	0%	1%	2%	1%	7%	0%	9%	4%	2%	0%	1%	8%	2%	0%	3%
Total Revenue	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Revenues	ASU	ECU	ECSU	FSU	NCA&T	NCCU	NCSU	UNCA	UNC-CH	UNCC	UNCG	UNCP	UNCW	NCSA	WCU	WSSU	Total
UG Residents	61%	34%	48%	77%	69%	47%	69%	60%	35%	49%	74%	85%	49%	17%	83%	85%	52%
UG Nonresidents	30%	52%	51%	13%	8%	29%	6%	40%	33%	29%	4%	4%	43%	68%	4%	9%	27%
Graduate Res.	5%	11%	1%	9%	21%	19%	16%	0%	17%	9%	19%	11%	5%	3%	11%	6%	13%
Graduate Nonres.	4%	3%	0%	1%	2%	5%	9%	0%	15%	13%	3%	0%	3%	12%	2%	0%	8%
Total Revenue	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Expenditures	ASU	ECU	ECSU	FSU	NCA&T	NCCU	NCSU	UNCA	UNC-CH	UNCC	UNCG	UNCP	UNCW	UNCSA	WCU	WSSU	Total
Financial Aid	50%	50%	50%	75%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%
Student Retention	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Other Critical Areas	25%	25%	25%	0%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Total Exp.	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

