We Measure Our Success By How Many Lives We Change For The Better
Mason’s Strategic Focus

- Expand Access To Excellence And Transformative Learning
- Grow Research and Innovation of Consequence
- Strengthen Thriving, Inclusive Academic Community
- Build Foundation For The Future

Building A University *for* the World
Access to Excellence

**Mission Focused** – deep commitment to serve students, the community, faculty and staff, and the broader global society

**Inclusive Excellence meets Demand** – driving forces of accessibility, affordability and high quality

**Intentional** – infrastructure and capacity for sustainable growth

**Vibrant Economic Force** – drives the local, regional and Commonwealth’s economy

**Revenue Base** – diversify revenue streams as state support declines

“We call it Smart Growth”
Expand Access to Excellence and Transformative Learning

- Create high-impact experiences (Mason Impact)
- Expand and improve student services (SER)
- Leverage diversity, inclusion and wellbeing
- Enhance access through ADVANCE and online education platforms
Grow Research and Innovation of Consequence

❖ Integrate research, innovation, and economic impact
❖ Build RI research infrastructure
❖ Expand research-intensive graduate programs
❖ Explore medical education and research
❖ Launch multidisciplinary institutes in a Sustainable Earth (ISE) and Digital Innovation (IDIA)
Strengthen Thriving, Inclusive Academic Community

- Recruit, retain and cultivate talents
- Increase faculty engagement through COACHE
- Improve salary competitiveness at all levels
- Increase minimum wages and student wages
- Increase faculty/staff diversity
Build Foundation for the Future

- Improve IT infrastructure
- Upgrade campus facilities
- Enhance budget/planning to support transparent decision making and sustainable growth
- Enhance fund raising and gift acceptance policies
SIX-YEAR PLAN ROADMAP 2019-2020

- **MAY 1, 2019**: Enrollment Projections due Burge/Durham/Detlev/Boye.
- **MAY 1, 2019**: Six-Year Plan Template issued w/ follow-up webinar training SCHEV.
- **MAY 2, 2019**: Plan update to BOV Finance & Land Use Cmte Carol Kissal.
- **MAY 17, 2019**: Tuition & Fees Survey due Gesele Durham/Angela Detlev.
- **JUNE 15 – AUG 1, TBD, 2019**: Capital Plan due SVP/Frank Strike.
- **TBD, 2019**: MOU for Tech Talent Investment Program created Commonwealth/Mason.
- **JULY 15 – AUGUST TBD, 2019**: Institutional meetings with Op Six SCHEV/Mason.
- **JULY 15, 2019**: Council Meeting SCHEV.
- **JULY 1, 2019**: Initial plans due to SCHEV, incl. Tech Talent Investment Plan Steering Committee.
- **SEPTEMBER 1, 2019**: Comments are sent to Institutions SCHEV.
- **OCTOBER 1, 2019**: Final Comments/Plans due to SCHEV Mason.
- **DECEMBER 1, 2019**: Finalized version of Six-Year Plan to DLAS.
- **2020**: Finalized version of Six-Year Plan to DLAS.

**Mason**
**SCHEV**
**Mason + SCHEV**
**Mason working group**
FY 2020 Financial Plan
FY 2019 Revenue Budget $1.06B

- Operating, $136.1
- Financial Aid, $26.8
- Capital Improvements, $33.7
- Mason Capital Funds, $17.1
- Tuition, $409.3
- Room & Board, $76.5
- Community & User Service Fee, $86.2
- Sponsored Research, $115.3
- Philanthropic Activities, $65.0
- Mandatory Student Services & Activity Fees, $97.1
- All Other Activities, 25%

VA State Funding, 18%

Capital, 2%

Enrollment Related Fees, 55%
Commonwealth Budget Update

0% in-state, undergraduate tuition increase
- $6.5M Tuition Moderation increase to GF
- Six-Year Plan was a 5% increase across-the-board

Faculty and Staff Compensation Increases
- Faculty 3% Base
- Classified Staff 2.75% base + 2.25% merit
- No increase in health care costs and a two-pay period “health care holiday”

Student Financial Aid
- $2.9M additional funds for undergraduate, need based aid.
- Total of $8.2M over the biennium.
FY 2020 Compensation Plan

**Instructional/Research Faculty**
- Promotion and Tenure
- Faculty Minimums
- 3% Base, 1% Merit Pool

**Adjunct Faculty**
- Minimum matrix increased 3%
- 3% Base Pool, +

**Admin/Professional Faculty**
- 3% Base, 1% Merit Pool

**Classified Staff**
- 2.75% base, 2.25% merit = 5%
- Living Wage: All eligible, full-time benefitted employees paid at least $15/hr.

**Student Wage**
- 2.75% Base Pool
- Increase minimum from $8/hr. to $9/hr.
- Does not include CWS due to Financial Aid implications

**Graduate Students**
- 2.75% Base Pool
- Minimum matrix increased 3%
- Graduate Students $15K A/Y minimum

**Non-Student Wage**
- 2.75% Base Pool
- Increase minimum from $8/hr. to $9/hr.

Note: Specific details to be released first week of April (effective dates, performance evaluation requirements, etc.)
Mason FY 2019 Financial Disparity

<table>
<thead>
<tr>
<th>Virginia Public Doctoral Institutions</th>
<th>W&amp;M</th>
<th>UVa</th>
<th>VCU</th>
<th>VT</th>
<th>ODU</th>
<th>Mason</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Fund</td>
<td>$8,062</td>
<td>$8,729</td>
<td>$7,396</td>
<td>$7,188</td>
<td>$7,057</td>
<td>$5,687</td>
</tr>
<tr>
<td>In-State Tuition</td>
<td>17,570</td>
<td>14,148</td>
<td>12,247</td>
<td>11,595</td>
<td>7,047</td>
<td>$9,060</td>
</tr>
<tr>
<td>Total</td>
<td>$25,632</td>
<td>$22,877</td>
<td>$19,643</td>
<td>$18,783</td>
<td>$14,104</td>
<td>$14,747</td>
</tr>
</tbody>
</table>

Mason’s total is 73% of doctoral average (excl. Mason)

General fund estimate is based on SCHEV FTE projection in the 2B report, numbers for all institutions will change with actual revised numbers for FY 2019
George Mason University has assumed 64.1% of the statewide enrollment growth accommodated in Virginia public four-year institutions since Fall 2010.
<table>
<thead>
<tr>
<th>FY 2020 Proposed Additional E&amp;G Revenue Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Tuition</strong></td>
</tr>
<tr>
<td><strong>Tuition Moderation</strong></td>
</tr>
<tr>
<td><strong>General Fund Increase</strong></td>
</tr>
<tr>
<td><strong>State % of Pay Increase</strong></td>
</tr>
<tr>
<td><strong>Additional Enrollment over Target</strong></td>
</tr>
<tr>
<td><strong>Credit Hour Overload</strong></td>
</tr>
<tr>
<td><strong>Fringe Savings</strong></td>
</tr>
<tr>
<td><strong>State Interest Earnings</strong></td>
</tr>
<tr>
<td><strong>Notes:</strong> Prior plan based on Six-Year Plan projections, Chapter 2 Budget, and pay/tuition policy.</td>
</tr>
<tr>
<td>Prior plan based on 5% across-the-board tuition increase from Six-Year Plan, Proposed FY 2020 has 3.5% increase on graduate tuition only.</td>
</tr>
<tr>
<td>General Assembly Conference report freezes in-state, undergrad tuition, and increases GF $6.5M for tuition affordability.</td>
</tr>
<tr>
<td>$5.5M in Chapter 2 budget includes funds for high degree awards.</td>
</tr>
<tr>
<td>$4.9M for central share of enrollment growth over FY19 plan, and FY20 anticipated growth.</td>
</tr>
<tr>
<td>Align credit hour overload with costs of instruction. Proposed revenue impact: $6.9M less FinAid $2.7M = $4.2M.</td>
</tr>
<tr>
<td>The Commonwealth covers ~50% of legislated pay increases. Mason pays ~50% of legislated PLUS 100% of any increase over that.</td>
</tr>
<tr>
<td>No increase in healthcare costs, and a two pay-period “healthcare holiday.”</td>
</tr>
<tr>
<td>$1M in state interest earnings.</td>
</tr>
</tbody>
</table>
Proposed FY 2020 Expenses

Prior FY 2020 plan based on six-year plan projections, Chapter 2 budget, and pay/tuition policy.
### Proposed FY 2020 E&G Overview

<table>
<thead>
<tr>
<th></th>
<th>FY 2020 PRIOR PLAN</th>
<th>PROPOSED</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sources</strong></td>
<td>$</td>
<td>47.1M</td>
</tr>
<tr>
<td><strong>Uses</strong></td>
<td>30.4M</td>
<td></td>
</tr>
<tr>
<td><strong>Balance Available</strong>*</td>
<td>$</td>
<td>16.7M</td>
</tr>
<tr>
<td><strong>New Investment Needs</strong></td>
<td>$</td>
<td>30M</td>
</tr>
</tbody>
</table>

*Available funds for additional mandatory expenses and strategic investments.
Removing CH 16 from the tuition plateau better aligns the cost of instruction with the value, yet still encourages students to take a full 15-credit hour class load.

Financial aid will be available for at-risk students, students in CH-intensive majors, and those enrolled in one-credit UNIV100 courses.

Proposed revenue impact: $6.9M less FinAid $2.7M = $4.2M.
## FY 2020 Student Fees/Room & Board Rates

### FY 2020 Room and Board Rates – Approved February 27, 2019

<table>
<thead>
<tr>
<th>Room &amp; Board Rates</th>
<th>FY 2019</th>
<th>FY 2020</th>
<th>$ Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freshman Traditional Double Room</td>
<td>$ 6,970</td>
<td>$ 7,105</td>
<td>$ 135</td>
<td>1.9%</td>
</tr>
<tr>
<td>Independence Meal Plan Board Rate</td>
<td>$ 4,490</td>
<td>$ 4,600</td>
<td>$ 110</td>
<td>2.4%</td>
</tr>
<tr>
<td>Total Room &amp; Board</td>
<td>$ 11,460</td>
<td>$ 11,705</td>
<td>$ 245</td>
<td>2.1%</td>
</tr>
</tbody>
</table>

### FY 2020 Proposed Student Fees

<table>
<thead>
<tr>
<th>Student Fees</th>
<th>FY 2019</th>
<th>FY 2020</th>
<th>$ Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full-Time Student</td>
<td>$3,402</td>
<td>$3,504</td>
<td>$ 102</td>
<td>3.0%</td>
</tr>
</tbody>
</table>

In FY 2020, the university-wide initiative for an Improved Student Experience and other auxiliary enterprises that are funded by student fees will incur increased costs, requiring additional student fee support.
Upcoming Events

- May 2: Board of Visitors
- May 6: Last Day of Classes
- May 17: Commencement
Thank You!