



University of Connecticut

*Appropriations
Committee*

March 11, 2003



Freshman Enrollment

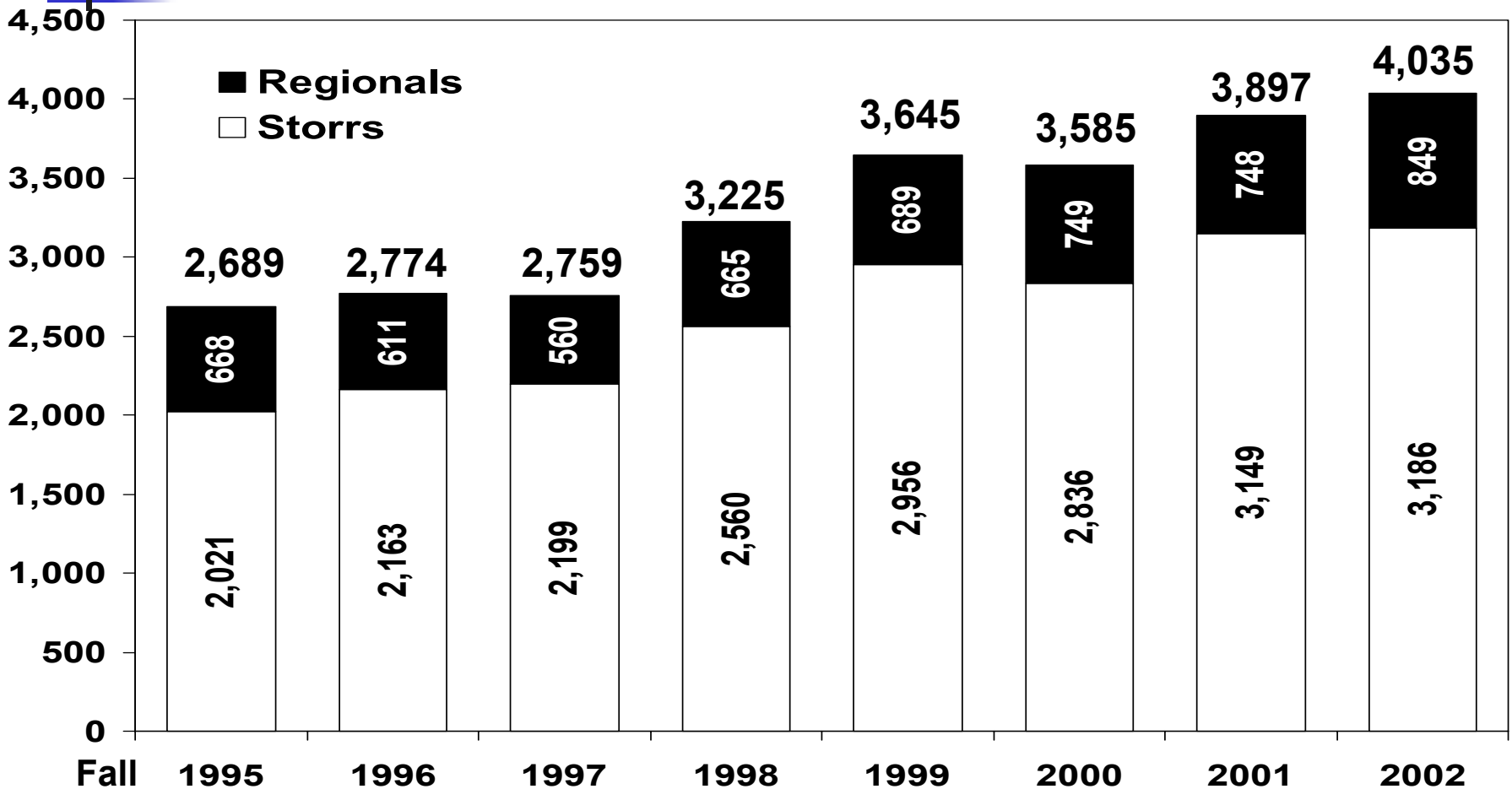
- Since Fall 1995:
 - Enrollment up 58% at Storrs
 - SAT scores have increased nearly 40 points at Storrs
 - Freshman minority enrollment has increased 61% at Storrs



Freshman Enrollment

- For Fall 2002 at Storrs:
 - 26% of freshmen were in Top 10% of their high school graduating class
 - 65% of freshmen were in Top 25% of their high school graduating class
- Total valedictorians and salutatorians since Fall 1995 are nearly 400 university-wide
- Freshman applications for Fall 2003 have increased by more than 4,600 or 42% over Fall 2002

Freshman Enrollment Growth (Storrs & Regionals)

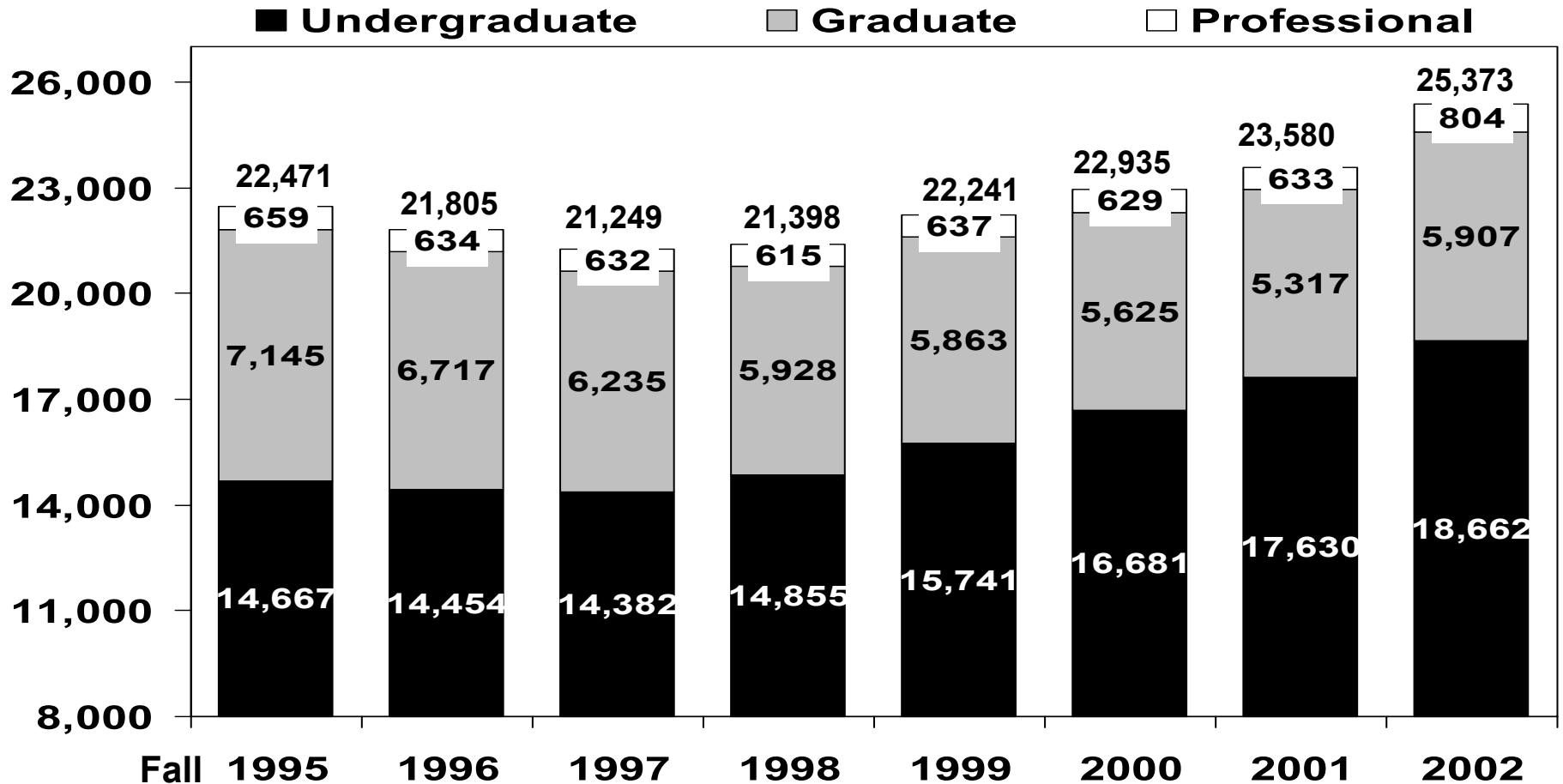
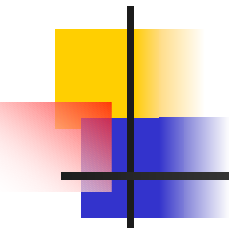




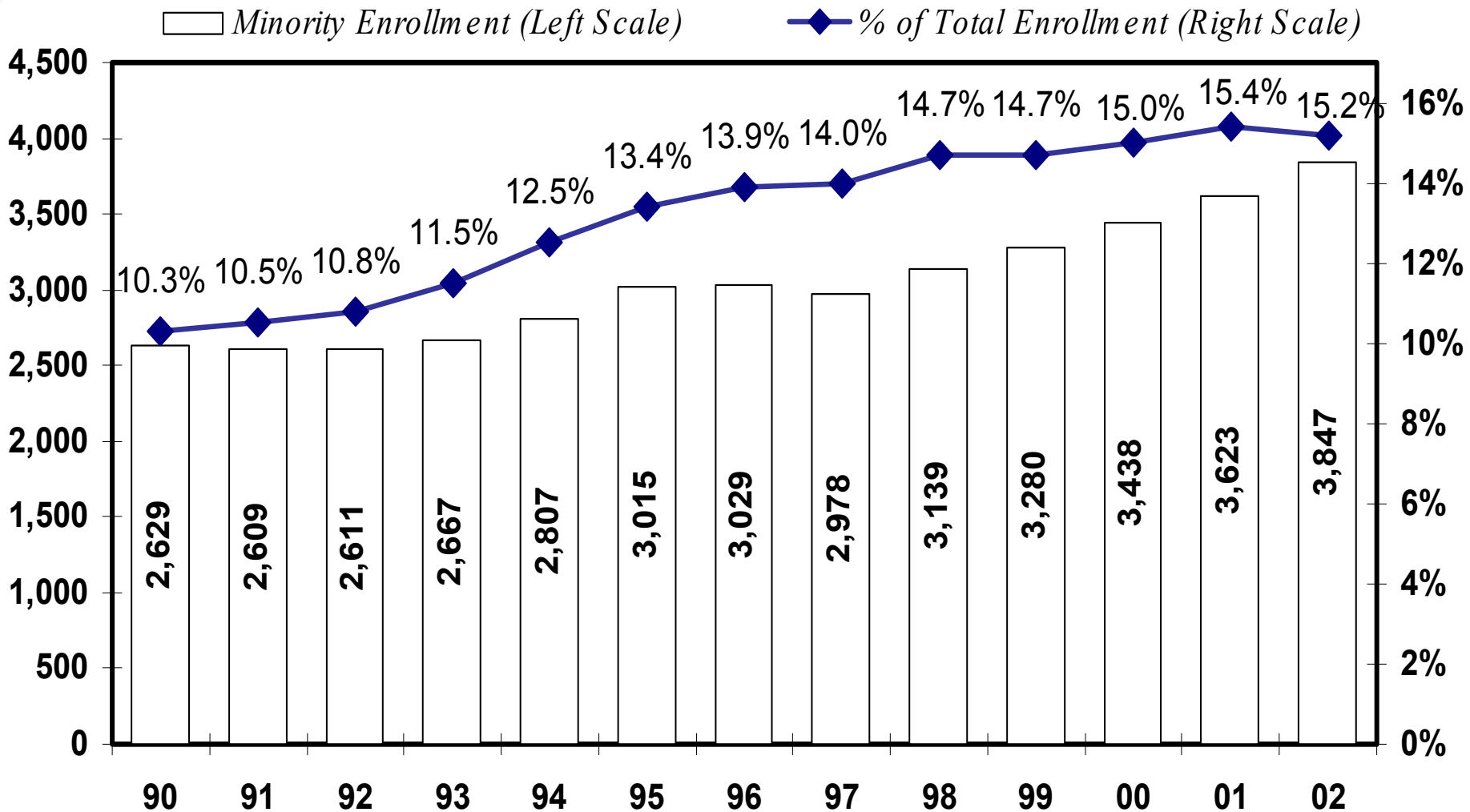
Retention & Graduation

- UConn students take an average of 4.4 years to graduate as compared to the national rate of 4.7 years
- For Fall 2002, we rank in the Top 20 of National Public Universities in the following categories:
 - Freshman retention: 88%
 - 6 year graduation rate: 69%
 - 6 year minority graduation rate: 65%

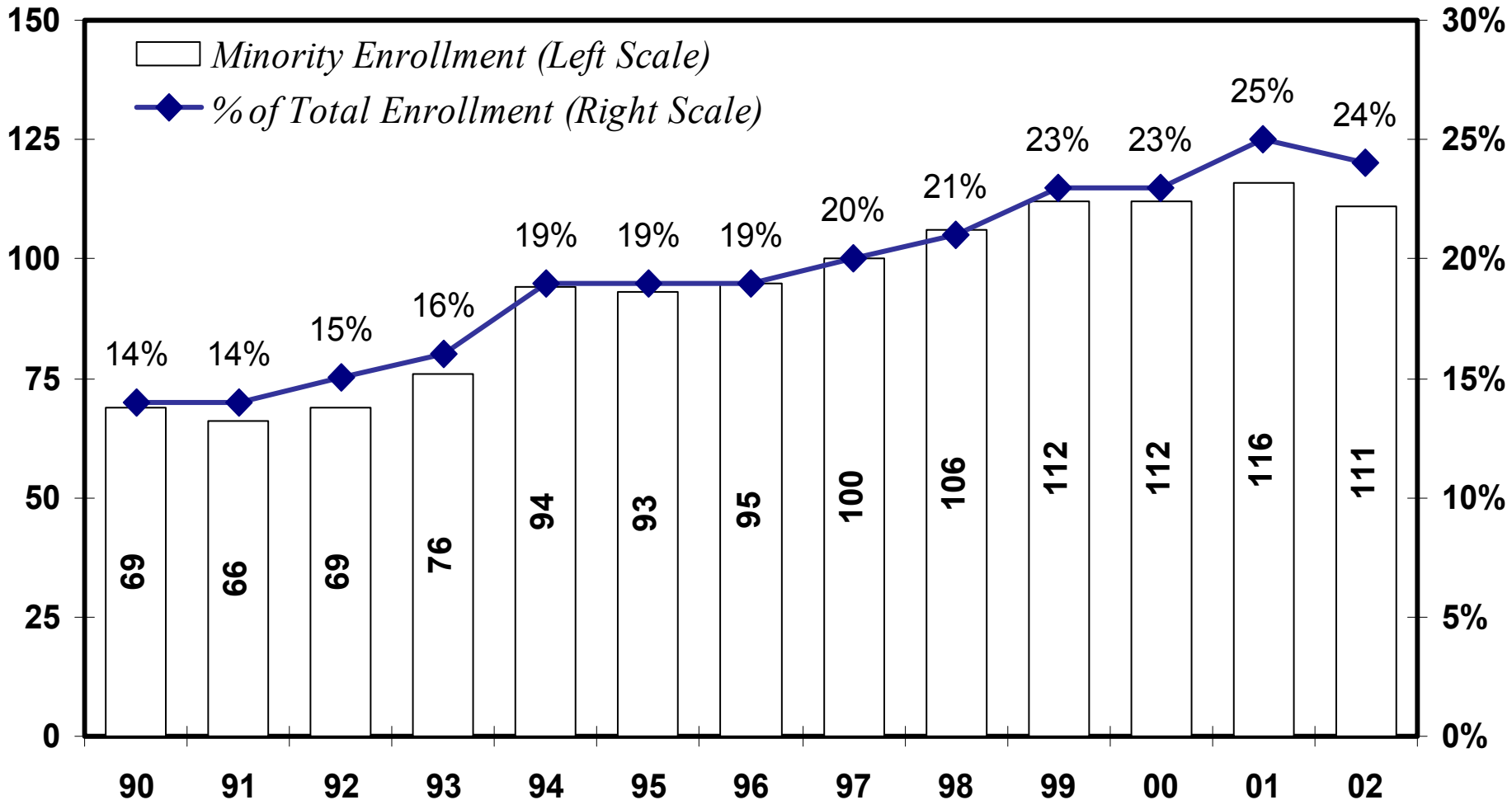
Total Student Enrollment (Storrs & Regionals)



Minority Enrollment (Storrs & Regionals)



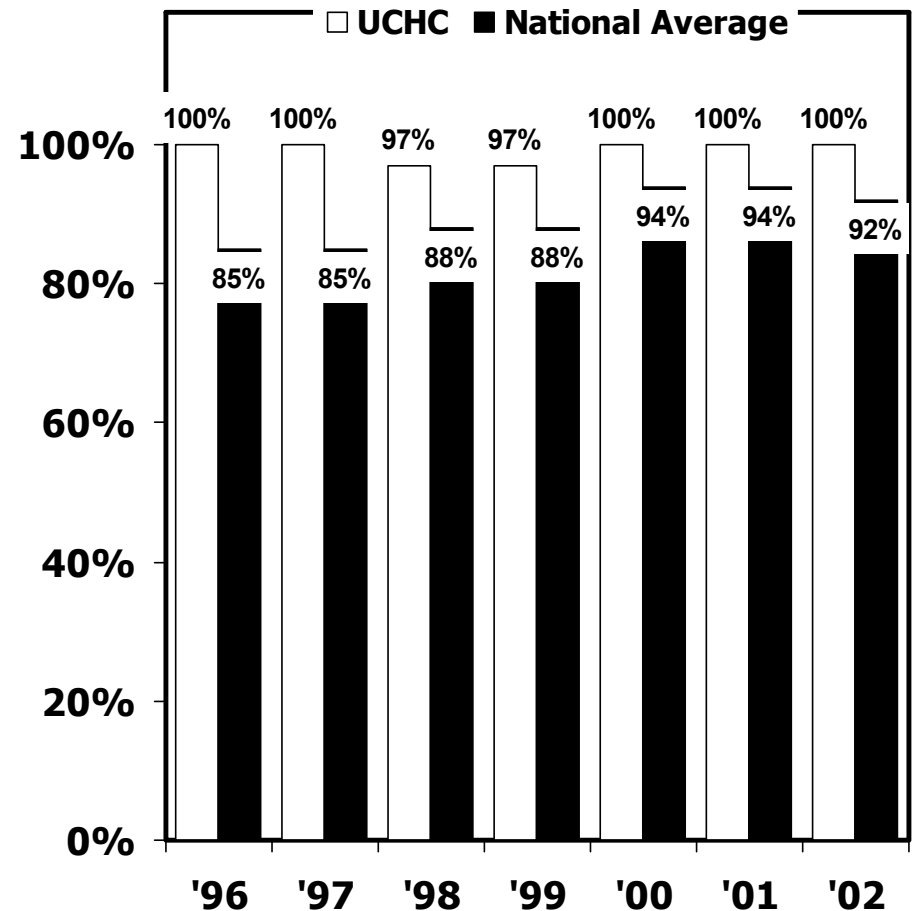
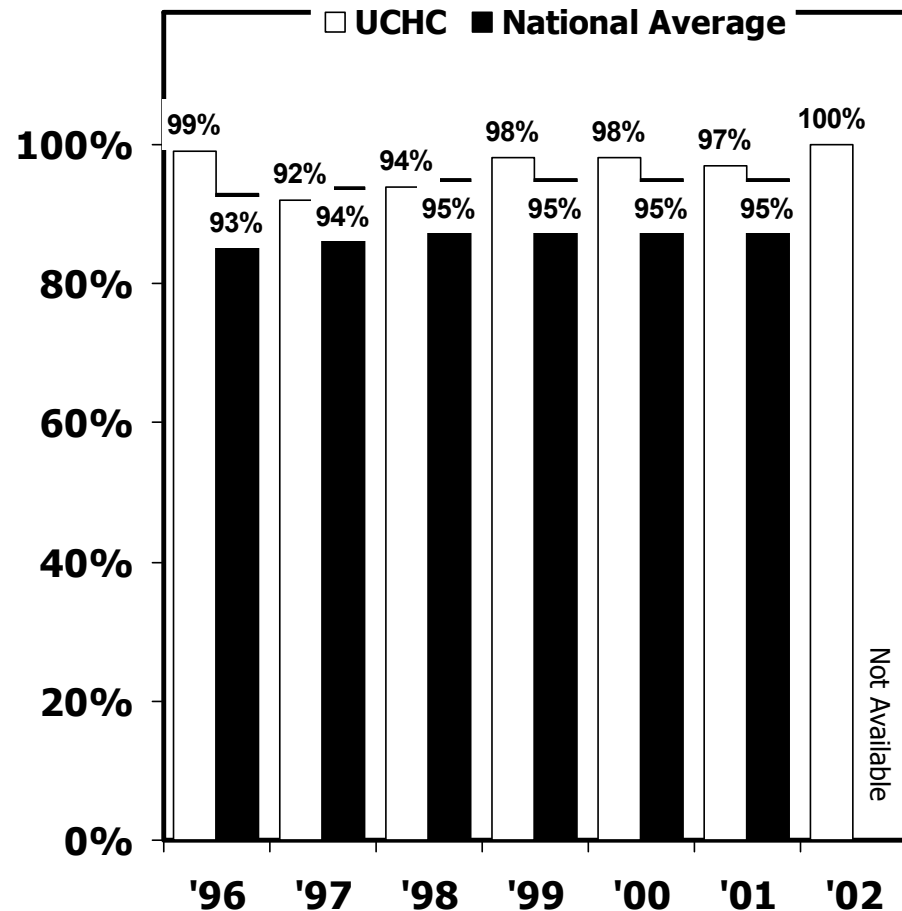
UConn Health Center Schools of Medicine & Dental Medicine Minority Enrollment



UConn Health Center Spring Student Passing Rates

National Medical Exam

National Dental Exam





Enrollment Goal Storrs & Regionals

- Exceeded Board of Trustee enrollment goal of 25,000 students by Fall 2005 in Fall 2002
- Enrollment will be maintained at a size that permits the proper balance of access for Connecticut's students, recruitment of excellent students from other states and abroad consistent with our identity as a leading American university, and the assurance of excellence in academic and student life programs.



Planning Assumptions Storrs & Regionals

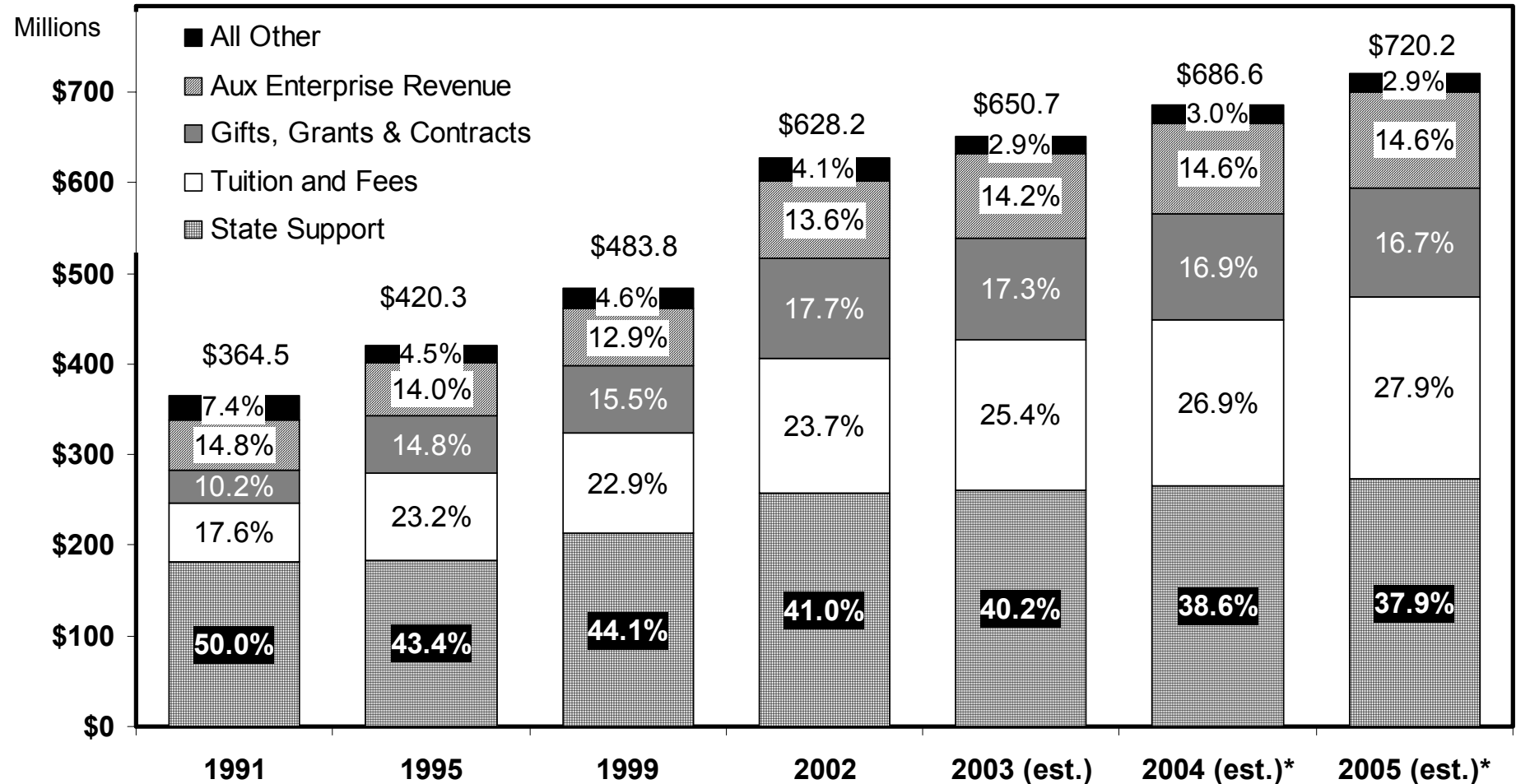
- We must continue to provide high-quality living and learning experiences for our students
- Continued reliance on state funding and growth in non-state revenue streams
- Storrs Campus is near capacity for undergraduate students with respect to instruction and on-campus housing
 - Number of students housed on-campus has grown 47% from 7,064 in Fall 1995 to 10, 417 in Fall 2002 (Fall 2003 projection is 11,242)
- Regional Campuses have the capacity to grow with marginal additional resource allocation



Challenging Environment

- State and national economic climate
- Imperative to move into the top ranks nationally
- Increased enrollment
- Student expectations
- Competitive college & healthcare marketplace
- **VALUE = QUALITY + AFFORDABILITY**

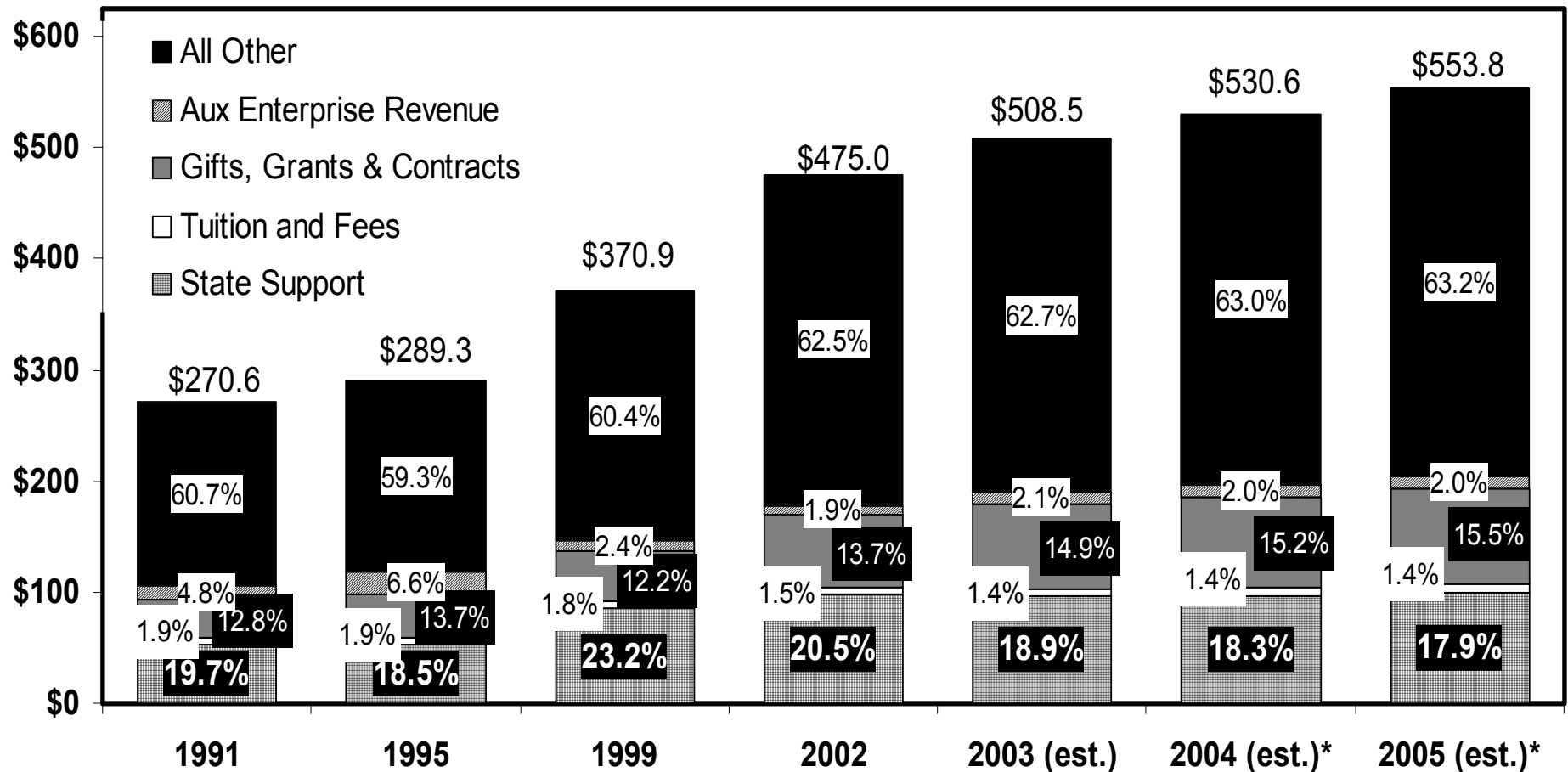
Total Revenues by Type Storrs & Regionals



*State Support reflects Governor's proposal as of 3/4/03.

Total Revenues by Type Health Center

Millions



*State Support reflects Governor's proposal as of 3/4/03.



Budget Strategy

- Reductions
- Recognition of External Financial Context
- Revenue Enhancement / Protection
- Expenditures for Quality



Internal Reductions

- Hiring & expenditure controls in effect University-wide
- \$32.3M reduction in FY03 budget
 - Storrs & Regionals: \$19.6M in FY03
 - Health Center: \$12.7M in FY03



Recognition of External Financial Context

- State's diminished financial capacity
 - Block Grant
 - Medicaid
- Impact of market conditions on private fundraising
- Federal budget impact
 - Research Funding
 - Medicare

Increased self-reliance is not a choice, it is a reality



FY 2003

Adjusted State Support

\$18.6M Reduction to Original Appropriation

Storrs & Regionals: \$15.0M Reduction

\$11.4M Appropriation Cut

\$3.6M Fringe Benefit Cut

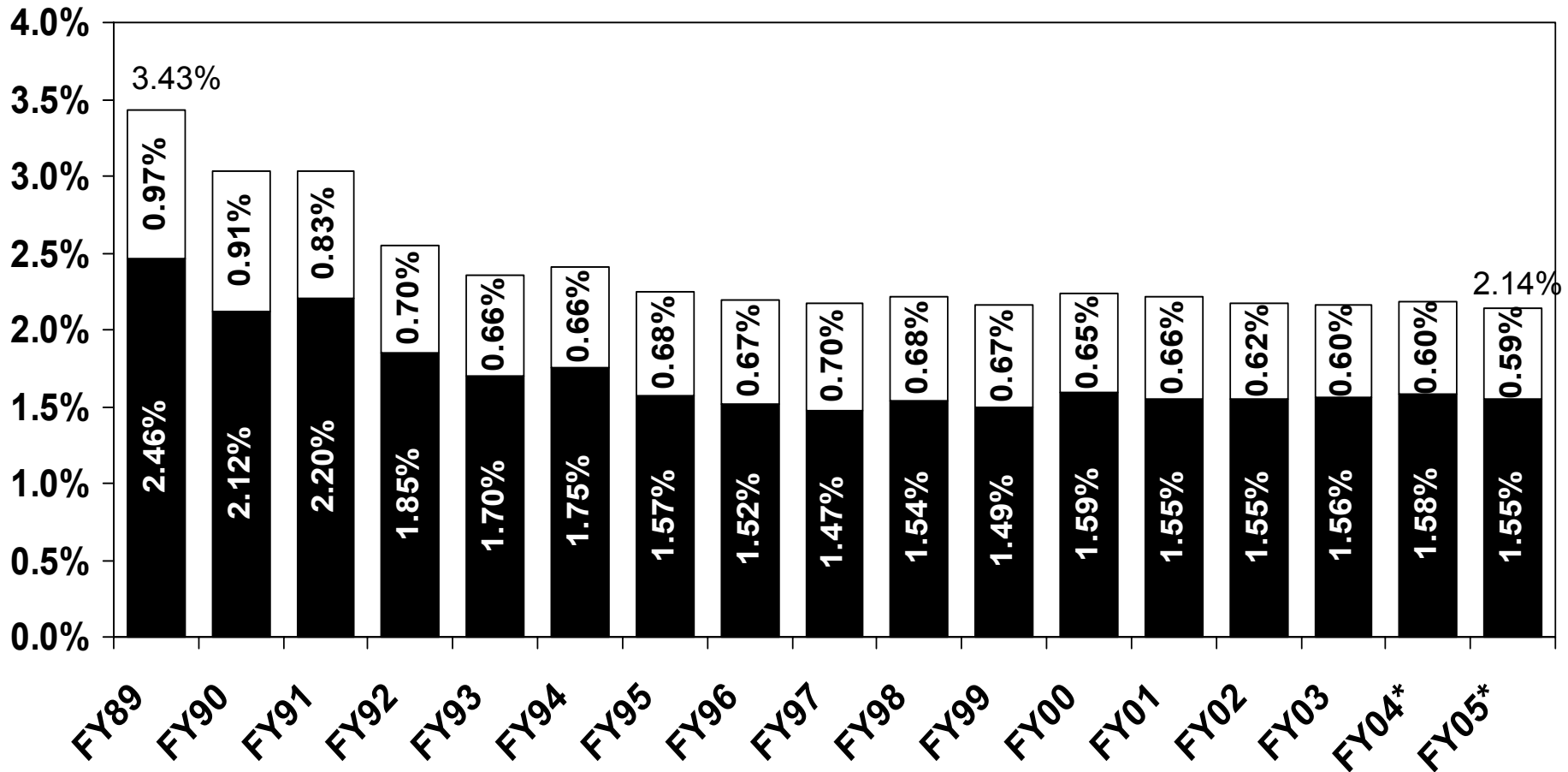
Health Center: \$3.6M Reduction

\$2.5M Appropriation Cut

\$1.1M Fringe Benefit Cut & Other Adjustments

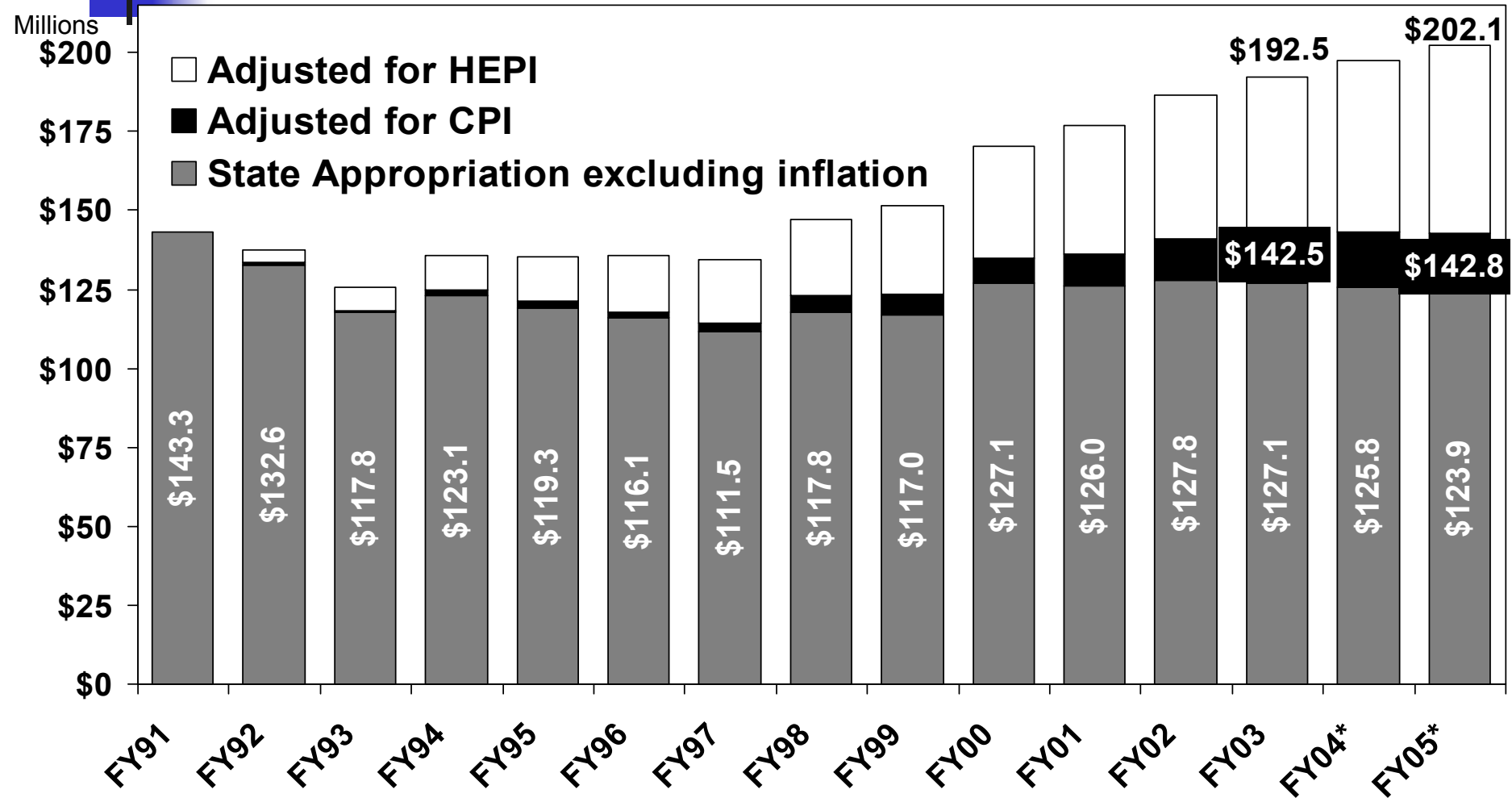
University Appropriations as a % of State's Total Budget

■ Storrs+ □ Health Center



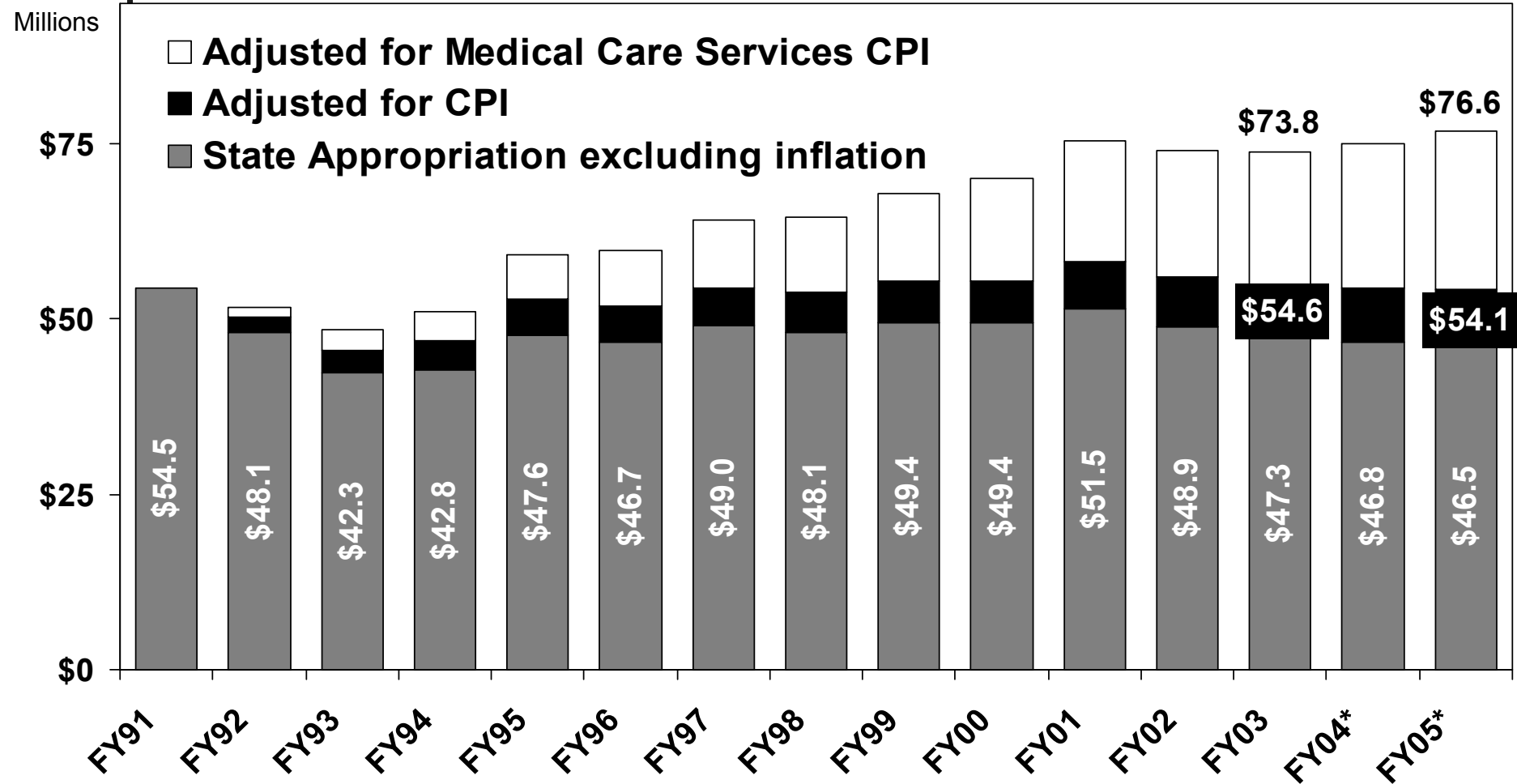
*State Appropriation reflects Governor's proposal as of 3/4/03.

State Appropriation (Storrs & Regionals)



*State Appropriation reflects Governor's proposal as of 3/4/03.

State Appropriation (Health Center)



*State Appropriation reflects Governor's proposal as of 3/4/03.

Revenue

Enhancement / Protection

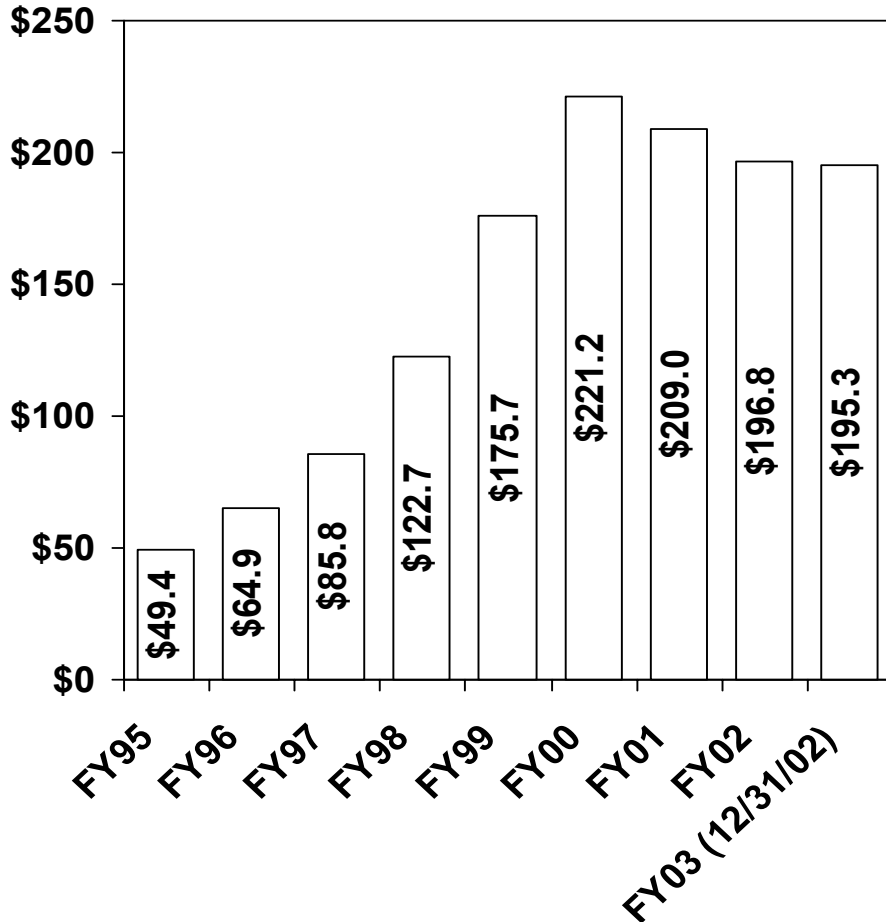
- Investments to protect private fundraising
- Protecting & growing the external grant revenue stream
- Health Center: patient revenue
- Storrs & Regionals: tuition & fee revenue

UConn Foundation

Protecting the growth potential of one of our key external revenue streams

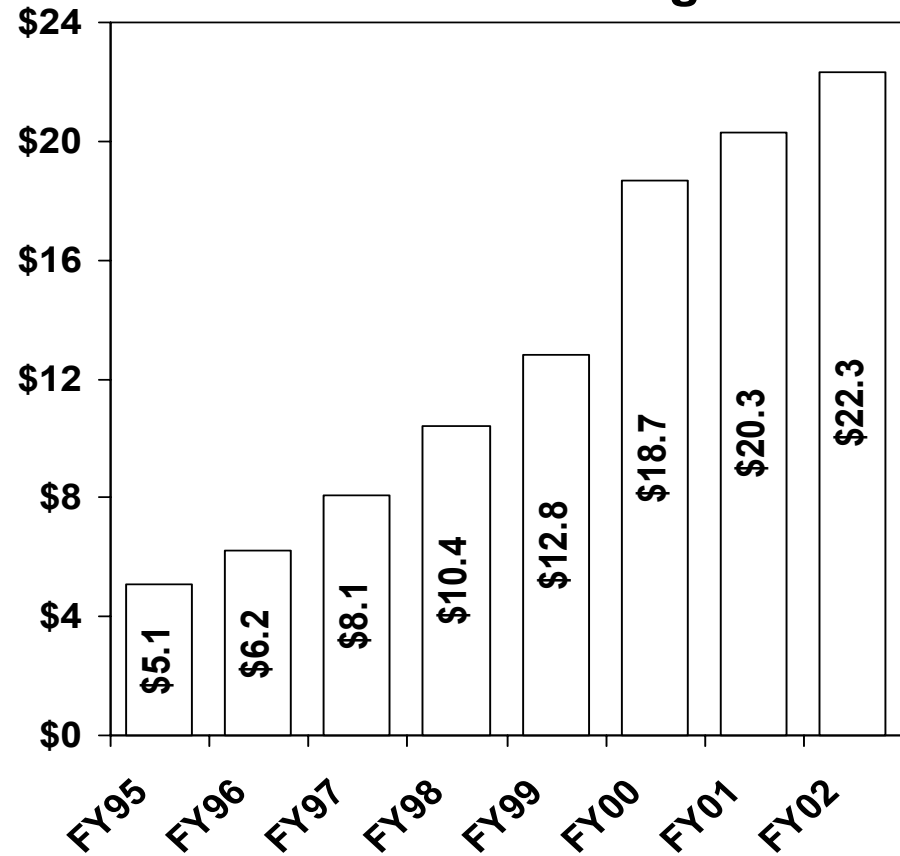
Endowment Assets

Millions



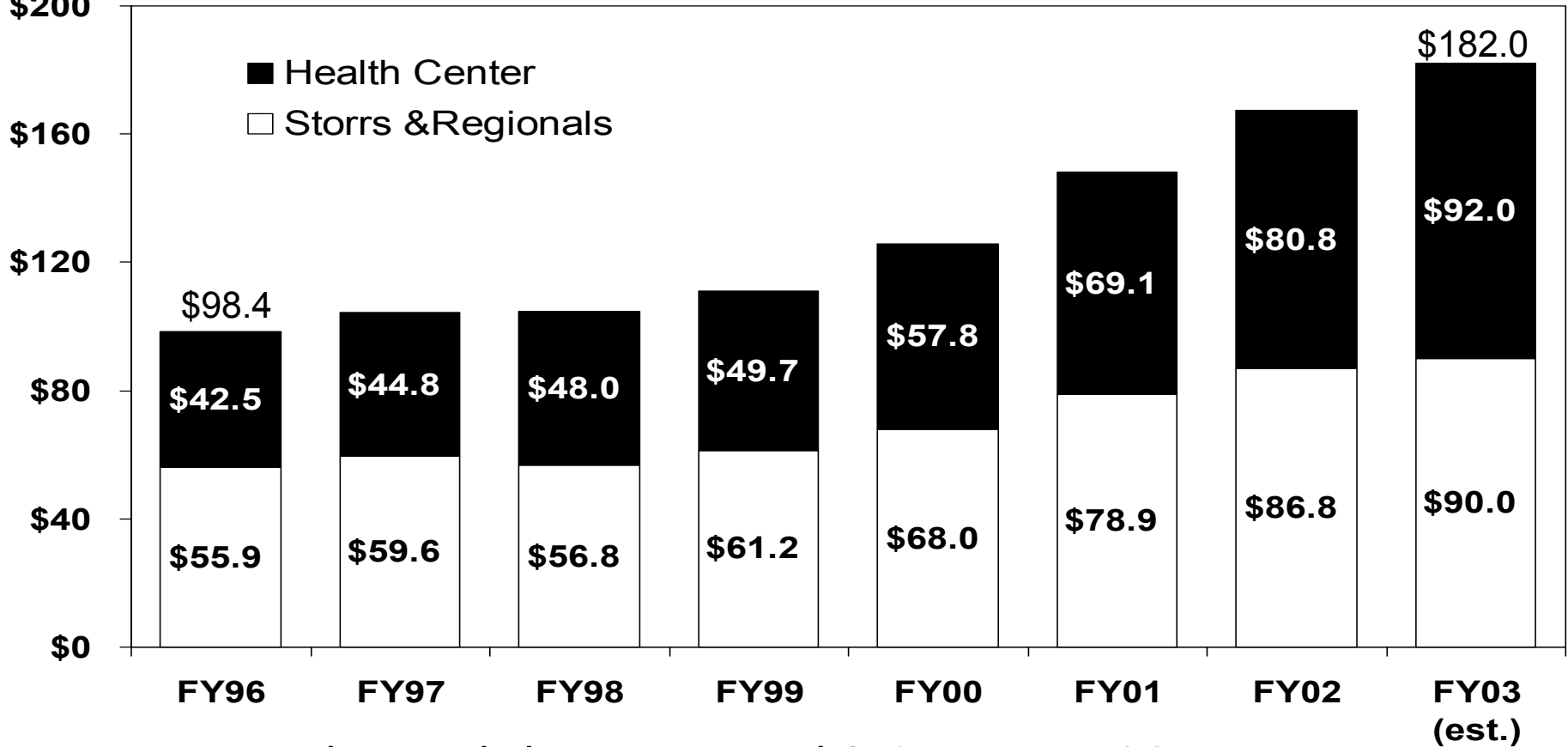
UConn Foundation Support of Students & Programs

Millions



Research Awards

Millions
\$200



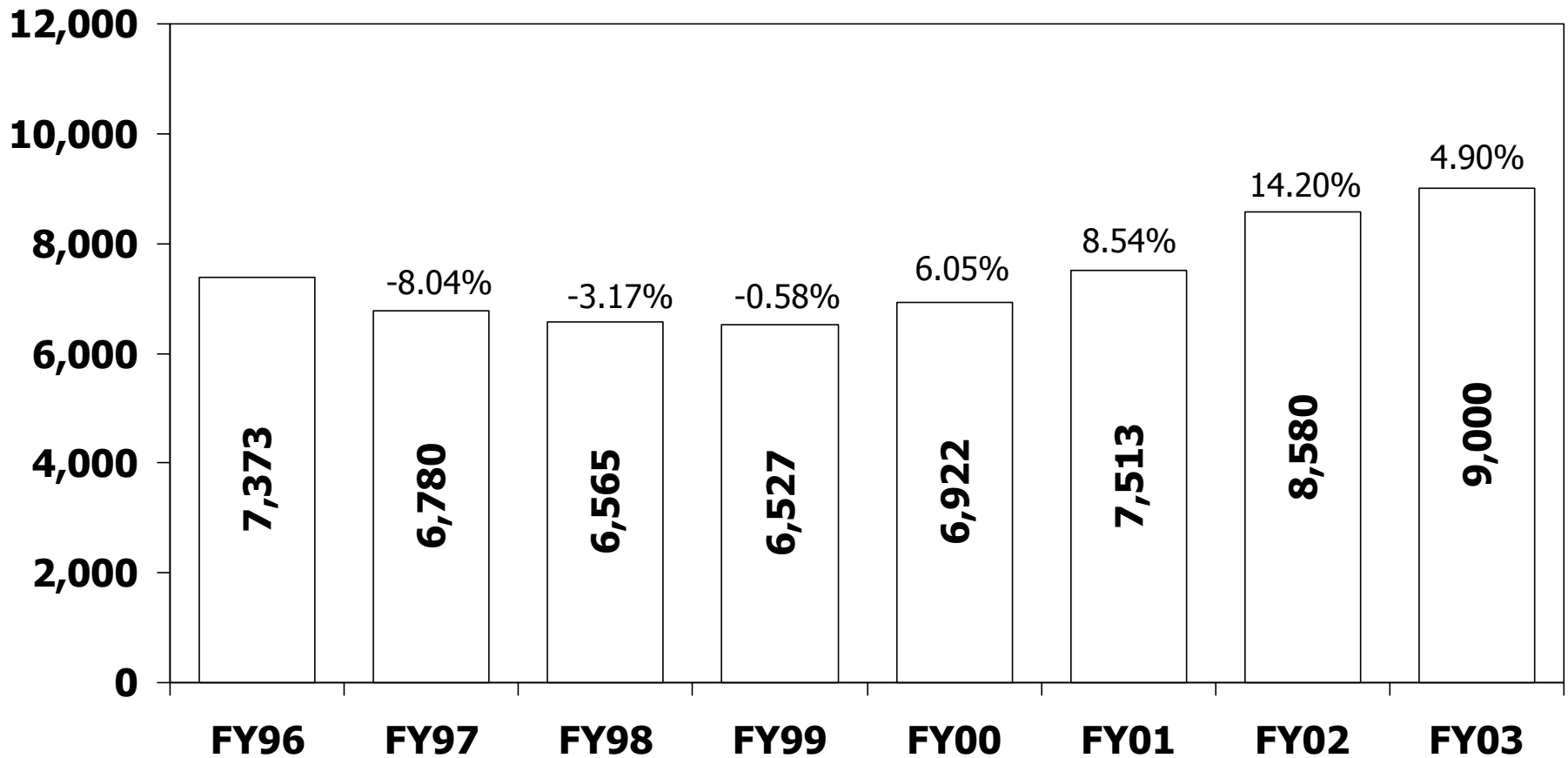
Research awards have increased 85% since FY96



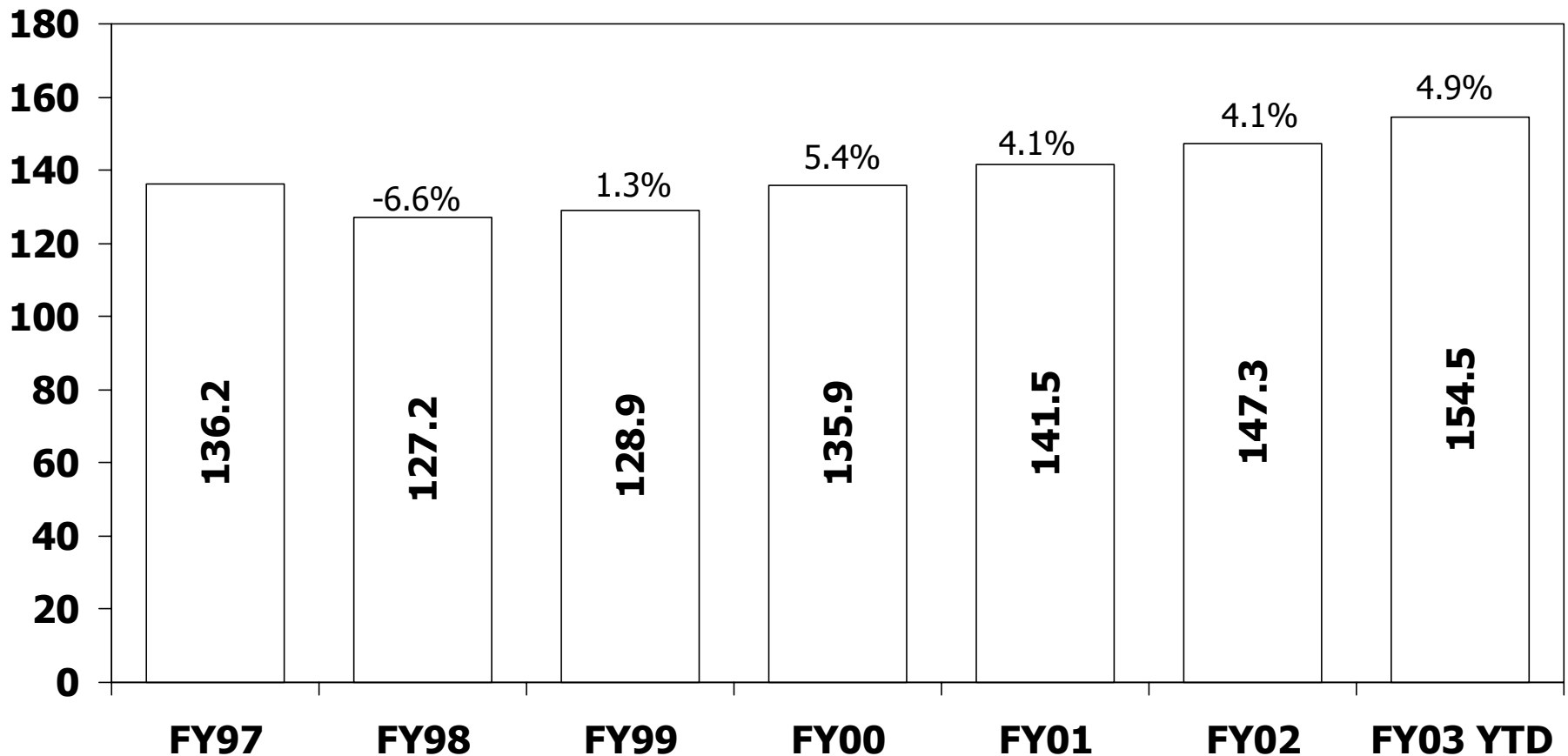
Health Center FY 2003 Key Revenue Drivers

| | |
|--------------------------------|--------------------|
| Patient Care | 40.6% |
| Corrections Managed HC | 15.0% |
| Interns & Residents | <u>5.4%</u> |
| Subtotal | 61.0% |
| State Support | 18.9% |
| All Other | <u>20.1%</u> |
| Total | 100.0% |

John Dempsey Hospital Admissions by Fiscal Year

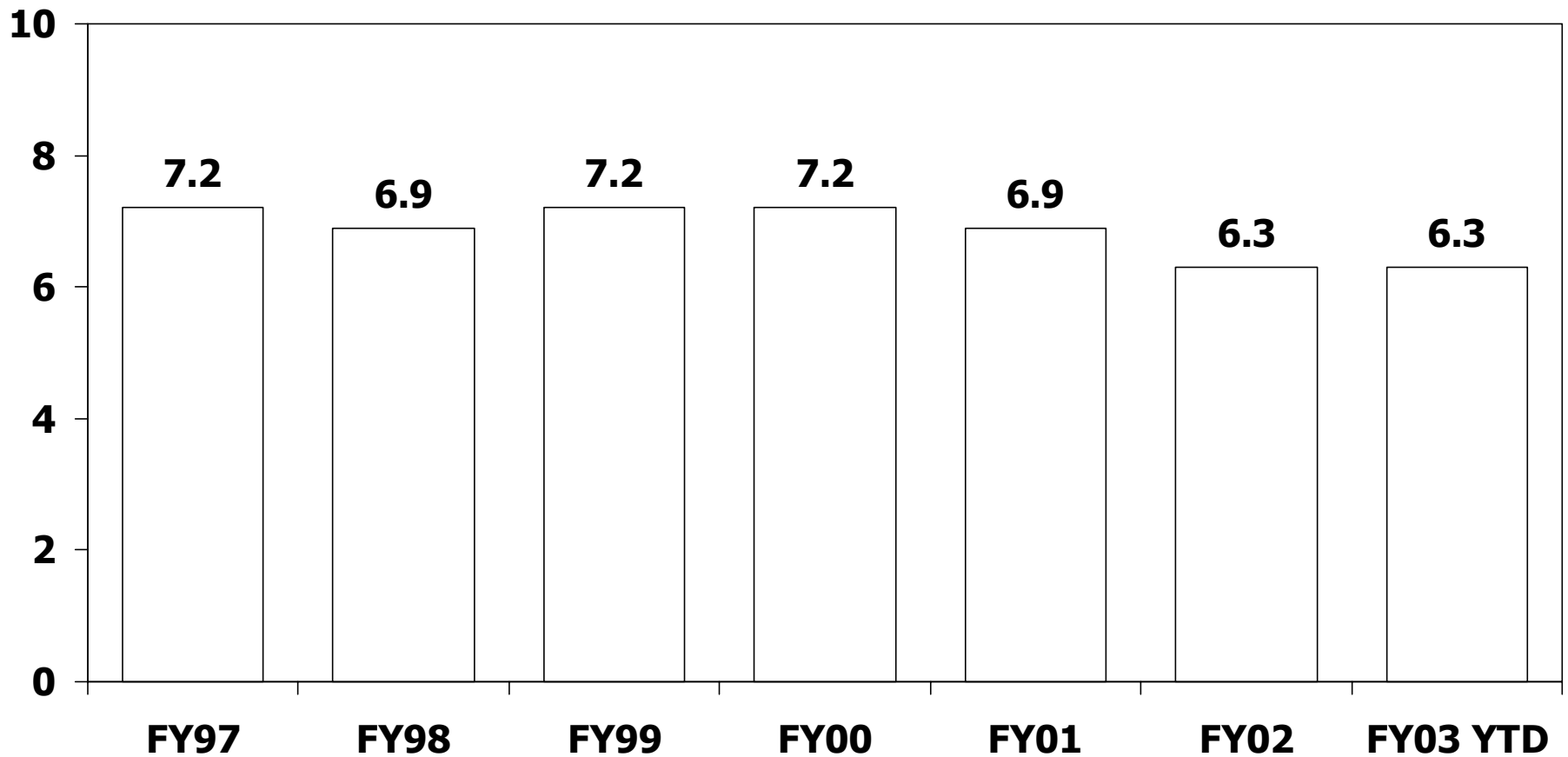


John Dempsey Hospital Average Daily Census

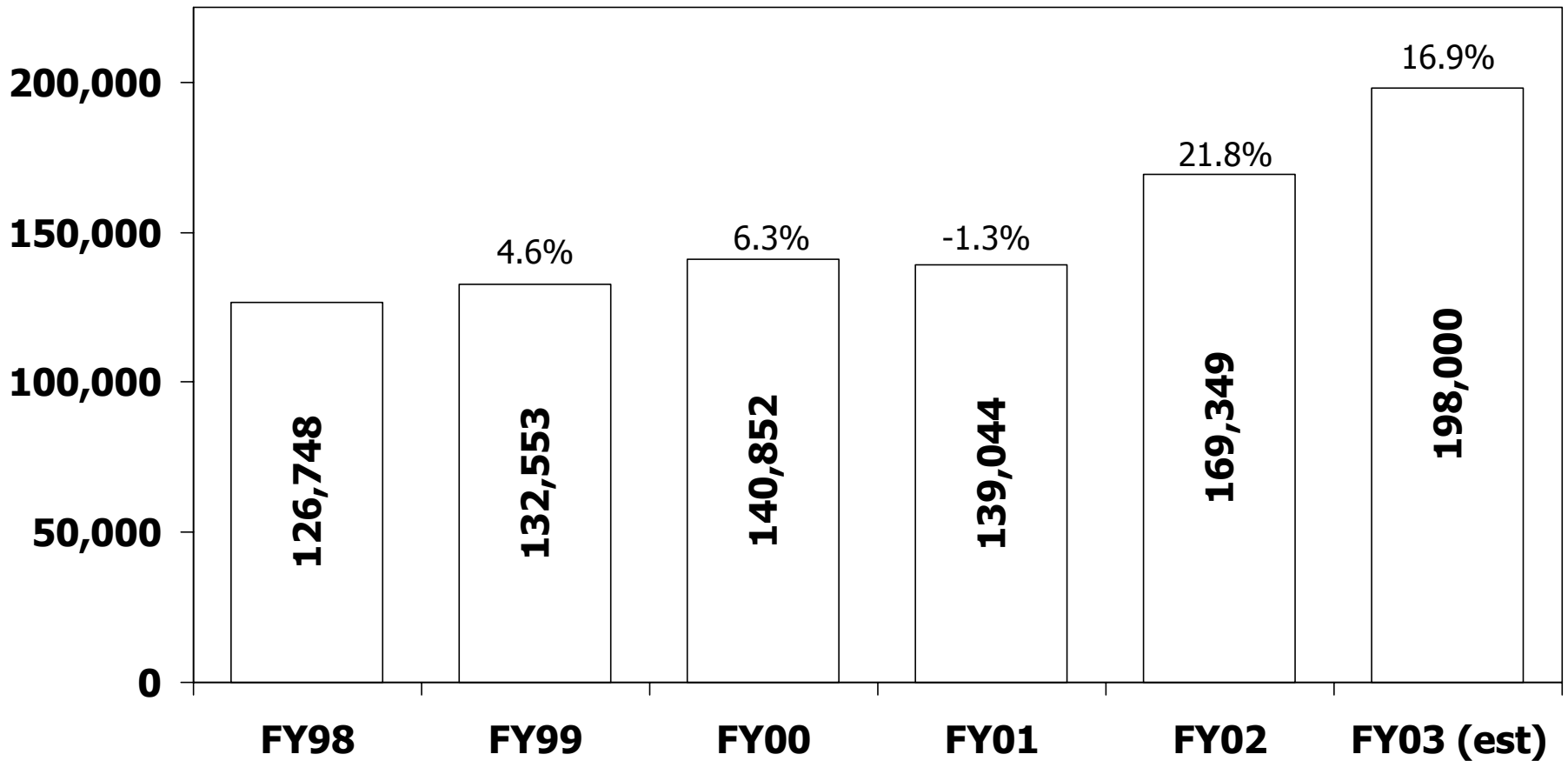


John Dempsey Hospital

Length of Stay

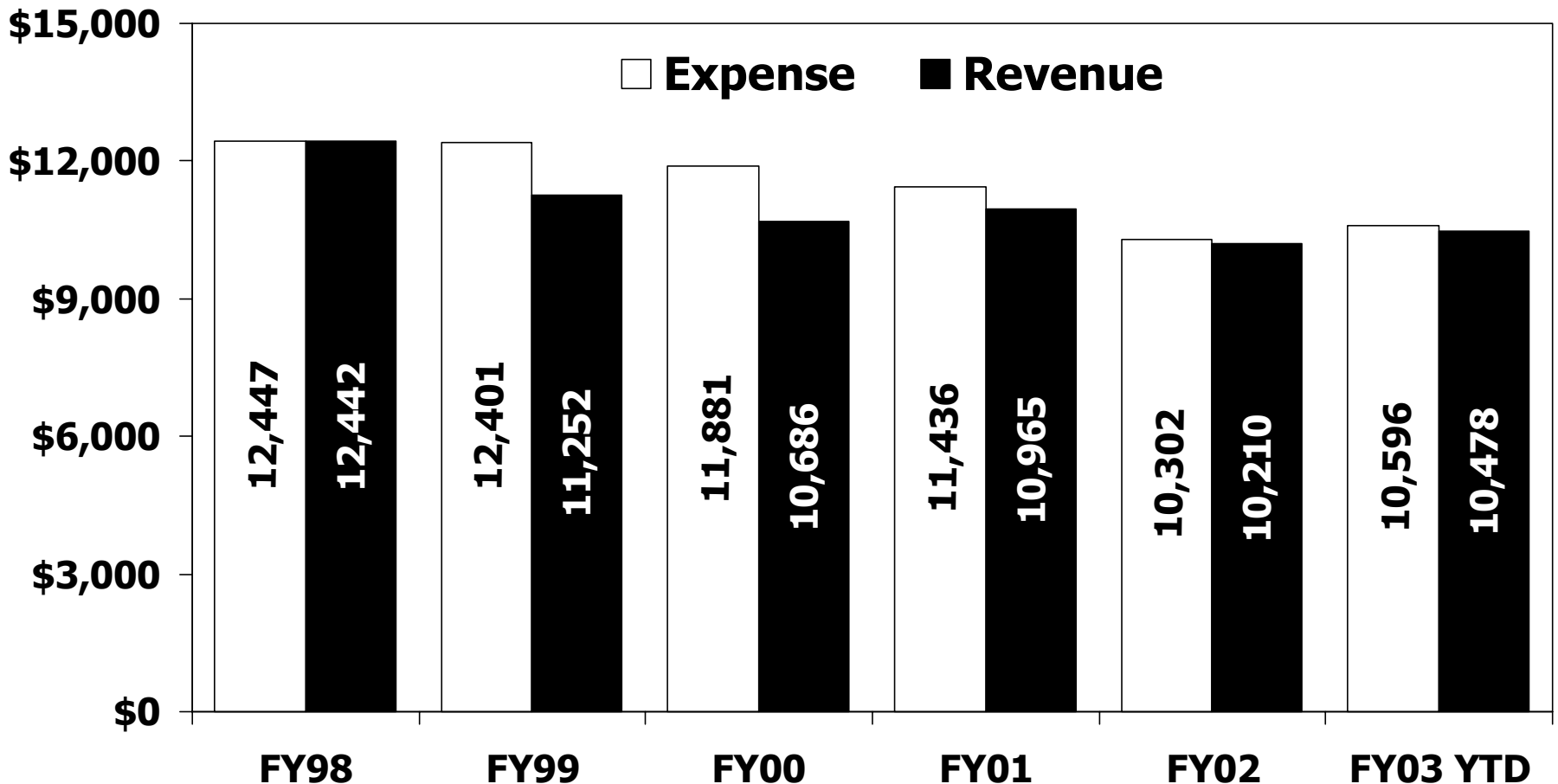


John Dempsey Hospital Outpatient Visits

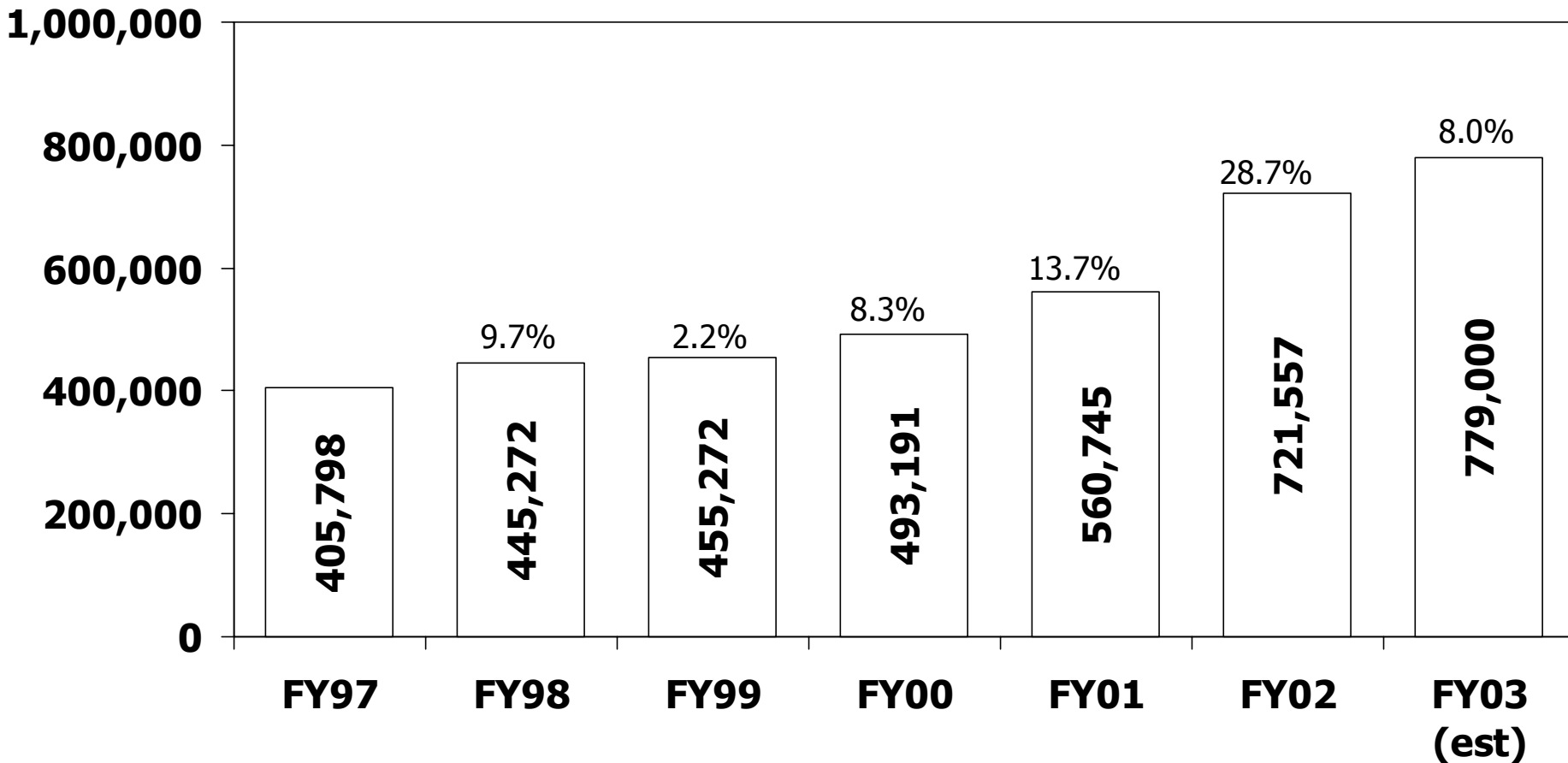


John Dempsey Hospital

Expense & Revenue per Adjusted Discharge



UConn Medical Group Volume (Total Invoices)



*FY02 includes a full year impact of UConn Health Partners.



Storrs & Regionals

FY 2003 Key Revenue Drivers

| | |
|---------------------------|---------------------|
| Tuition & Fees | 25.4% |
| Auxiliary Revenue | <u>14.2%</u> |
| Subtotal | 39.6% |
| State Support | 40.2% |
| All Other | 20.2% |
| Total | 100.0% |

Approved FY 2003 Tuition Adjustment Storrs & Regionals

- From FY 1995 to FY 2003, tuition has increased at a 2.7% compounded annual rate.

| | <u>Original</u> | <u>Approved</u> |
|-------------------|------------------------|------------------------|
| Tuition | 3.9% | 6.3% |
| GUF | 3.8% | 3.8% |
| Other Fees | 3.9% | 3.9% |
| Room | 3.9% | 3.9% |
| Board | 3.9% | 3.9% |
| Annualized | 3.9% | 4.7% |

*Additional cost for an in-state undergraduate is \$108 more than originally approved by the Board of Trustees on June 29, 2000.

Approved Tuition & Fee Increases Storrs & Regionals

- From FY 1995 to FY 2005, the compounded annual rate of tuition increase is projected at 4.1%.

| | % Increase <u>FY04 over FY03</u> | % Increase <u>FY05 over FY04</u> |
|-------------------------|---|---|
| Total Annualized | 7.91% | 6.85% |
| Tuition | 11.21% | 8.75% |
| GUF | 5.80% | 2.20% |
| Other Fees* | 17.34% | 9.13% |
| Room | 5.53% | 5.50% |
| Board | 5.03% | 6.53% |

*Percentage increase includes the new Student Union Building Fee to support the renovation and expansion of the Student Union.

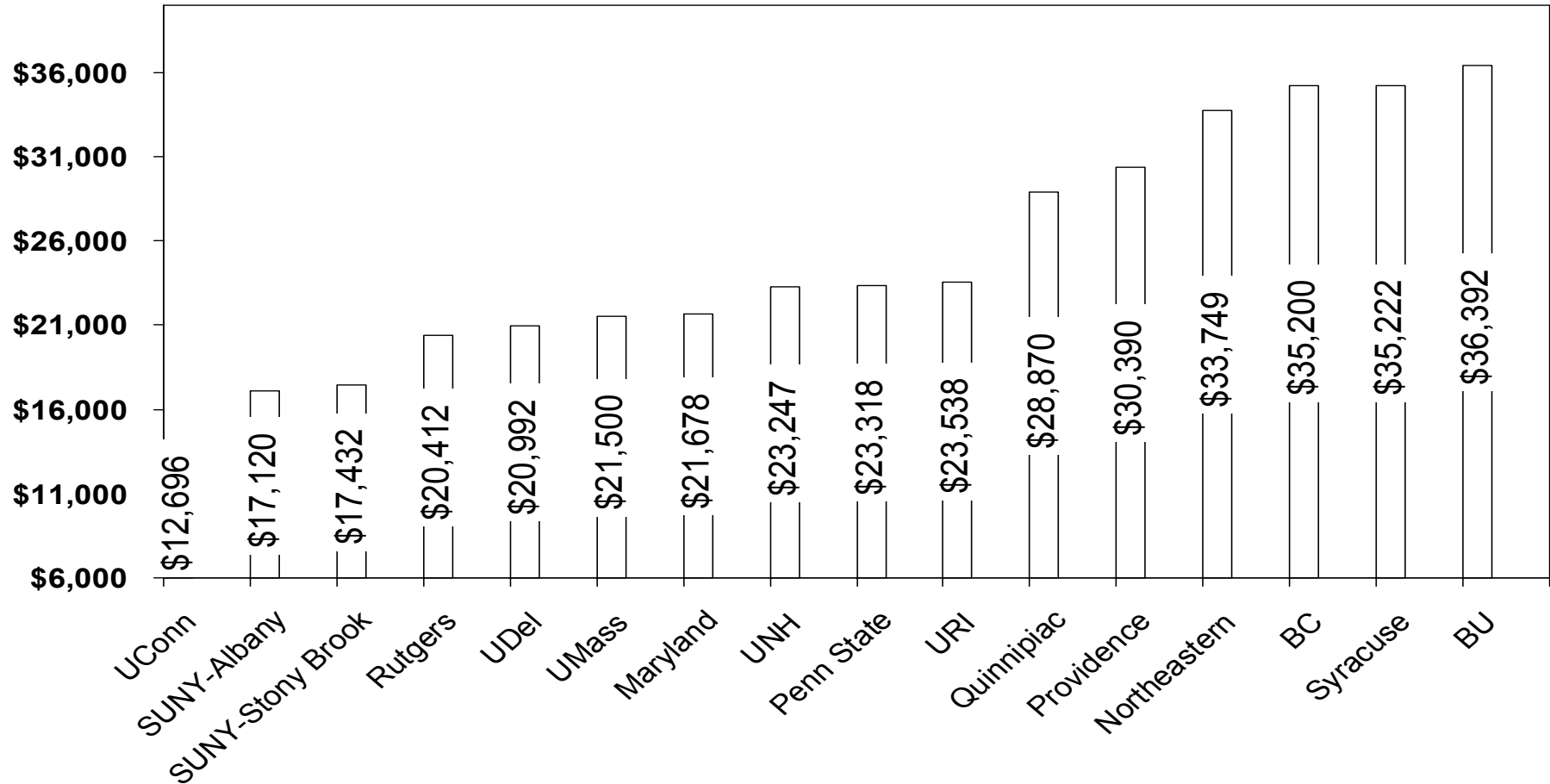
Approved Tuition, Fees, Room & Board Storrs & Regionals



| | <u>FY 2003</u> | <u>FY 2004</u> | <u>FY 2005</u> |
|---------------------|-----------------------|-----------------------|-----------------------|
| In-State | | | |
| Undergraduate | \$12,696 | \$13,700 | \$14,638 |
| Graduate | \$14,019 | \$15,138 | \$16,176 |
| Out-of-State | | | |
| Undergraduate | \$22,391 | \$24,484 | \$26,366 |
| Graduate | \$23,324 | \$25,490 | \$27,434 |

University's Top Competitors

Cost of Attendance for a Connecticut Student FY 2003





FY 2003 Tuition, Fees, Room & Board University's Top Competitors

| <u>Private Schools</u> | <u>In & Out Of State</u> | <u>Public Schools</u> | <u>In State</u> | <u>Out of State</u> |
|------------------------|----------------------------------|-----------------------------|---------------------|-------------------------|
| Boston Univ. | \$36,392 | Rutgers | \$14,436 | \$20,412 |
| Syracuse Univ. | \$35,222 | Univ. Rhode Island | \$14,068 | \$23,538 |
| Boston College | \$35,200 | Penn State | \$14,054 | \$23,318 |
| Northeastern Univ. | \$33,749 | Univ. New Hampshire | \$13,547 | \$23,247 |
| Providence College | \$30,390 | Maryland | \$12,914 | \$21,678 |
| Quinnipiac College | \$28,870 | <i>Univ. of Connecticut</i> | <i>\$12,696</i> | <i>\$22,391</i> |
| | | SUNY – Stony Brook | \$12,532 | \$17,432 |
| | | Univ. Massachusetts | \$12,500 | \$21,500 |
| | | SUNY – Albany | \$11,872 | \$17,120 |
| | | Univ. Delaware | \$11,462 | \$20,992 |

National Tuition and Mandatory Fee Comparisons

Fiscal Year 2002 vs Fiscal Year 2003¹

| Public Institutions | FY02 In-State Tuition & Fees | FY03 In-State Tuition & Fees | % Change | FY02 Out-of- State Tuition & Fees | FY03 Out-of- State Tuition & Fees | % Change |
|---|------------------------------------|------------------------------------|----------|---|---|----------|
| Purdue University-West Lafayette | \$4,164 | \$5,580 | 34.01% | \$13,872 | \$16,260 | 17.21% |
| U. of Missouri at Columbia | \$3,985 | \$5,282 | 32.55% | \$10,407 | \$14,435 | 38.70% |
| Texas A & M University-College Station | \$3,722 | \$4,748 | 27.57% | \$10,052 | \$11,288 | 12.30% |
| U. of Washington | \$3,983 | \$5,016 | 25.94% | \$13,257 | \$15,717 | 18.56% |
| U. of Massachusetts at Amherst | \$5,212 | \$6,432 | 23.41% | \$13,354 | \$14,655 | 9.74% |
| U. of Cincinnati | \$5,706 | \$6,986 | 22.43% | \$14,478 | \$17,369 | 19.97% |
| U. of North Carolina - Chapel Hill | \$3,183 | \$3,856 | 21.14% | \$12,349 | \$15,140 | 22.60% |
| U. of Kansas | \$2,884 | \$3,484 | 20.80% | \$9,811 | \$10,687 | 8.93% |
| North Carolina State University | \$3,208 | \$3,827 | 19.30% | \$13,348 | \$15,111 | 13.21% |
| U. of Iowa | \$3,522 | \$4,191 | 18.99% | \$11,960 | \$13,833 | 15.66% |
| Iowa State University | \$3,478 | \$4,110 | 18.17% | \$10,812 | \$12,802 | 18.41% |
| U. of California at Berkeley | \$3,633 | \$4,200 | 15.61% | \$14,337 | \$15,702 | 9.52% |
| Alabama State University | \$2,520 | \$2,904 | 15.24% | \$5,040 | \$5,808 | 15.24% |
| Cleveland State University | \$4,110 | \$4,728 | 15.04% | \$8,076 | \$9,318 | 15.38% |
| U. of Arkansas, Fayetteville | \$3,880 | \$4,456 | 14.85% | \$9,438 | \$10,828 | 14.73% |
| Clemson University | \$5,090 | \$5,834 | 14.62% | \$11,284 | \$12,932 | 14.60% |
| U. of Pittsburgh | \$7,482 | \$8,528 | 13.98% | \$15,740 | \$17,336 | 10.14% |
| U. of Michigan at Ann Arbor | \$6,862 | \$7,806 | 13.76% | \$20,973 | \$23,738 | 13.18% |
| Michigan State University | \$5,686 | \$6,436 | 13.19% | \$13,614 | \$15,406 | 13.16% |
| U. of Texas at Austin | \$3,766 | \$4,250 | 12.85% | \$10,096 | \$10,790 | 6.87% |
| U. of California at Davis | \$4,087 | \$4,595 | 12.43% | \$14,791 | \$15,669 | 5.94% |
| Pennsylvania State Univ - University Park | \$6,582 | \$7,396 | 12.37% | \$14,394 | \$15,522 | 7.84% |
| Indiana U. at Bloomington | \$4,735 | \$5,315 | 12.25% | \$14,469 | \$15,926 | 10.07% |
| Oregon State University | \$3,654 | \$4,098 | 12.15% | \$13,104 | \$14,316 | 9.25% |
| U. of Houston | \$2,986 | \$3,348 | 12.12% | \$8,808 | \$9,888 | 12.26% |
| U. of Idaho | \$2,720 | \$3,044 | 11.91% | \$8,720 | \$9,764 | 11.97% |
| U. of North Texas | \$3,050 | \$3,400 | 11.48% | \$9,170 | \$9,680 | 5.56% |
| North Dakota State University | \$3,272 | \$3,618 | 10.57% | \$7,359 | \$8,551 | 16.20% |
| Rutgers State U. of New Brunswick,NJ | \$6,654 | \$7,308 | 9.83% | \$12,092 | \$13,284 | 9.86% |
| Utah State University | \$2,591 | \$2,834 | 9.38% | \$7,897 | \$8,199 | 3.82% |
| U. of Utah | \$3,042 | \$3,324 | 9.27% | \$9,299 | \$10,181 | 9.48% |
| U. of North Dakota | \$3,265 | \$3,562 | 9.10% | \$7,865 | \$8,496 | 8.02% |
| U. of Nebraska at Lincoln | \$3,830 | \$4,166 | 8.77% | \$9,432 | \$10,760 | 14.08% |

National Tuition and Fee Comparisons

Fiscal Year 2002 vs Fiscal Year 2003¹

| Public Institutions | FY02 In-State Tuition & Fees | FY03 In-State Tuition & Fees | % Change | FY02 Out-of- State Tuition & Fees | FY03 Out-of- State Tuition & Fees | % Change |
|-------------------------------------|------------------------------------|------------------------------------|----------|---|---|----------|
| U. of Virginia | \$4,236 | \$4,595 | 8.47% | \$18,268 | \$19,805 | 8.41% |
| Ohio State University | \$4,788 | \$5,190 | 8.40% | \$13,554 | \$14,571 | 7.50% |
| U. of Illinois-Urbana-Champaign | \$5,294 | \$5,736 | 8.35% | \$13,114 | \$14,340 | 9.35% |
| West Virginia University | \$2,998 | \$3,240 | 8.07% | \$8,802 | \$9,710 | 10.32% |
| Virginia Tech | \$3,664 | \$3,936 | 7.42% | \$12,488 | \$13,552 | 8.52% |
| U. of Maine | \$5,070 | \$5,440 | 7.30% | \$12,840 | \$13,510 | 5.22% |
| New Mexico State University | \$3,006 | \$3,216 | 6.99% | \$10,014 | \$10,788 | 7.73% |
| U. of Rhode Island | \$5,386 | \$5,759 | 6.93% | \$14,164 | \$15,003 | 5.92% |
| Florida State University | \$2,513 | \$2,684 | 6.80% | \$10,402 | \$12,228 | 17.55% |
| U. of Wyoming | \$2,807 | \$2,997 | 6.77% | \$8,279 | \$8,661 | 4.61% |
| Virginia Commonwealth U. | \$3,675 | \$3,918 | 6.61% | \$13,855 | \$14,888 | 7.46% |
| U. of Kentucky | \$3,735 | \$3,975 | 6.43% | \$10,275 | \$10,527 | 2.45% |
| U. of Colorado at Boulder | \$3,357 | \$3,566 | 6.23% | \$17,367 | \$18,910 | 8.88% |
| U. of Maryland at College Park | \$5,341 | \$5,670 | 6.16% | \$13,413 | \$14,434 | 7.61% |
| U. of Florida | \$2,433 | \$2,581 | 6.08% | \$9,771 | \$11,595 | 18.67% |
| U. of Arizona at Tucson | \$2,348 | \$2,490 | 6.05% | \$9,804 | \$10,356 | 5.63% |
| U. of New Hampshire | \$7,693 | \$8,130 | 5.68% | \$17,113 | \$17,830 | 4.19% |
| U. of Connecticut | \$5,824 | \$6,154 | 5.67% | \$14,942 | \$15,849 | 6.07% |
| Northern Illinois University | \$4,583 | \$4,811 | 4.97% | \$7,733 | \$8,391 | 8.51% |
| U. of Georgia | \$3,418 | \$3,580 | 4.74% | \$11,314 | \$12,792 | 13.06% |
| Georgia Institute of Technology | \$3,454 | \$3,616 | 4.69% | \$12,350 | \$13,986 | 13.25% |
| U. of Vermont | \$8,665 | \$8,994 | 3.80% | \$20,725 | \$21,484 | 3.66% |
| Temple University | \$7,324 | \$7,602 | 3.80% | \$13,062 | \$13,856 | 6.08% |
| Louisiana State U. - Baton Rouge | \$3,419 | \$3,536 | 3.42% | \$8,719 | \$8,836 | 1.34% |
| U. of Hawaii at Manoa | \$3,253 | \$3,349 | 2.95% | \$9,733 | \$9,829 | 0.99% |
| U. of California at San Diego | \$3,863 | \$3,950 | 2.25% | \$14,567 | \$14,654 | 0.60% |
| U. of California at Irvine | \$4,556 | \$4,606 | 1.10% | \$15,260 | \$15,738 | 3.13% |
| U. of California at Los Angeles | \$4,193 | \$4,225 | 0.76% | \$15,267 | \$15,727 | 3.01% |
| State U. of New York at Stony Brook | \$4,268 | \$4,298 | 0.70% | \$9,168 | \$9,198 | 0.33% |
| Arizona State University at Tempe | \$2,486 | \$2,490 | 0.16% | \$10,352 | \$10,356 | 0.04% |
| State U. of New York at Buffalo | \$4,790 | \$4,790 | 0.00% | \$9,690 | \$9,690 | 0.00% |
| U. of Alabama at Birmingham | \$3,700 | \$3,700 | 0.00% | \$6,670 | \$6,670 | 0.00% |

Source: US News & World Report

¹ List sorted by In-State Tuition & Fee percentage change in descending order.



Strategic Priorities Storrs & Regionals

- Undergraduate Experience
- Upper Division & Graduate Programs
- Centers of Excellence
- Diversity
- Environment & Safety



Undergraduate Experience

Goal: To provide high quality programs that ensure students will stay in school and complete their degrees successfully

- Course Availability
- Academic Support Services
- Affordability



Course Availability

- Ensure adequate offerings in high-demand courses via careful monitoring of enrollment and funding of “hot spots”
- Adding 10 “in residence” assistant professors and related teaching assistantships per year for FY03, FY04 & FY05: \$850k per year



Improving Academic Support Services w/Technology

- **Web Access Improvements**
 - Search & register for classes
 - View grades
 - Threaded discussion lists
 - On-line placement testing
- **Improved Processes**
 - Enforcement of prerequisites
 - Extended hours of access
 - Web-based grade entry by faculty
- **Future Enhancements**
 - Student access to financial aid information
 - Student access to billing information



Academic Advising

- 7 Academic Advisors to be added in FY03 to improve student:advisor ratio
- Peer Mentoring program increased to provide every student with opportunity to have a mentor
- First Year Experience provides personal learning experience for almost 80% of the entering class.



Schedule of Total Financial Aid

| <u>Total Financial Aid (in millions)</u> | <u>FY 2003</u> | <u>FY 2004</u> | <u>FY 2005</u> |
|---|-----------------------|-----------------------|-----------------------|
| Need Based-Grants | \$34.0 | \$36.9 | \$39.2 |
| Need Based - Student Labor | \$10.6 | \$10.6 | \$10.6 |
| University Scholarships | \$17.9 | \$19.0 | \$20.1 |
| Non-University Scholarships | \$5.5 | \$5.5 | \$5.5 |
| Loans | \$57.2 | \$58.3 | \$59.5 |
| Tuition Waivers | <u>\$25.0</u> | <u>\$28.7</u> | <u>\$31.9</u> |
| Total Financial Aid | \$150.2 | \$159.0 | \$166.8 |
| <u>Tuition Funded Financial Aid</u> | | | |
| Need Based Grants/Labor | \$19.9 | \$22.7 | \$25.1 |
| Scholarships | \$7.0 | \$7.7 | \$8.4 |
| Tuition Waivers | <u>\$25.0</u> | <u>\$28.7</u> | <u>\$31.9</u> |
| Total Tuition Funded Financial Aid | \$51.9 | \$59.1 | \$65.4 |
| Total as a % of Gross Tuition Revenue | 37.6% | 37.8% | 37.8% |
| Tuition Funded Need Based % | 17.6% | 17.8% | 17.8% |



Financial Aid

- Additional \$4.5M for FY03, \$3.9M for FY04 and \$3.6M for FY05
- All tuition, fee and room and board increases have been matched by increased financial aid to ensure that no student's education would be denied or hampered based on financial need
- 75% of all UConn students (undergraduates and graduates) receive financial aid



Accessibility: Financial Aid

- Reduced the average indebtedness of graduates from \$16,800 to \$14,400 in the past 2 years
- Eliminated the unmet need gap for the neediest in-state students
- DHE policy requires a need-based financial aid set aside of 15%, UConn sets aside 17.6%
- Total tuition funded aid for FY03 is \$51.9M, FY04 is \$59.1M and FY 05 is \$65.4M



Upper Division & Graduate Programs

- School of Law-\$647k increase to address instructional and support needs of unexpectedly large first year class
- School of Business-\$280k increase
- Neag School of Education-\$220k increase



Centers of Excellence

- **Center for Regenerative Biology**

- \$150k in FY03 - 5 New Faculty Hired
- \$318k in FY04
- \$1.3M Grant Expenditures in FY02
- \$4M Grant Expenditures Expected by FY05

- **Fuel Cell Research Center**

- \$150k each in FY03 & FY04
- \$11.8M in External Support for FY00-FY03

- **Tech Transfer & Incubator (split w/Health Center)**

- \$600k in FY03
- \$200k in FY04



Diversity

- \$400k in FY03, \$565k in FY04, \$750k in FY05
 - Joint Academic Appointments
 - Minority Recruitment (Student & Faculty)
 - Support Services
- From FY99 to FY03, the expenditures for the Office of Multicultural Affairs & the Centers has nearly doubled from \$2.9M to \$3.9M



Environment & Safety

- Environmental Protection: \$800k
 - US EPA Voluntary Audit Program
 - Hiring Environmental Affairs Manager
 - Addressing Landfill Remediation Needs
- Public Safety
 - \$450k in FY03
 - \$500k in FY04



Strategic Priorities

UConn Health Center

- Develop five (5) regionally pre-eminent **Signature Programs** in Cancer, Musculoskeletal Medicine, Connecticut Health, Brain and Human Behavior and Cardiology
- Be recognized as a Center for Distinguished Basic Science **Research**
- Offer outstanding Medical, Dental and Graduate Biomedical **Education** through a highly innovative curriculum supported by excellence in research and clinical care
- Strengthen our **Healthcare Partnership** with the State of Connecticut