



South Carolina House of Representatives Higher Education and Technical Colleges Subcommittee Briefing

Winthrop University Budget Request 2020-21

January 15, 2020





FY2019-20 State Funding Recap

Recurring Funds (\$1,958,372)

- Support faculty salaries and reduce portion of salaries supported by student tuition
- Support technology & infrastructure investments

Non-Recurring - Capital Reserve Fund (\$7,500,000)

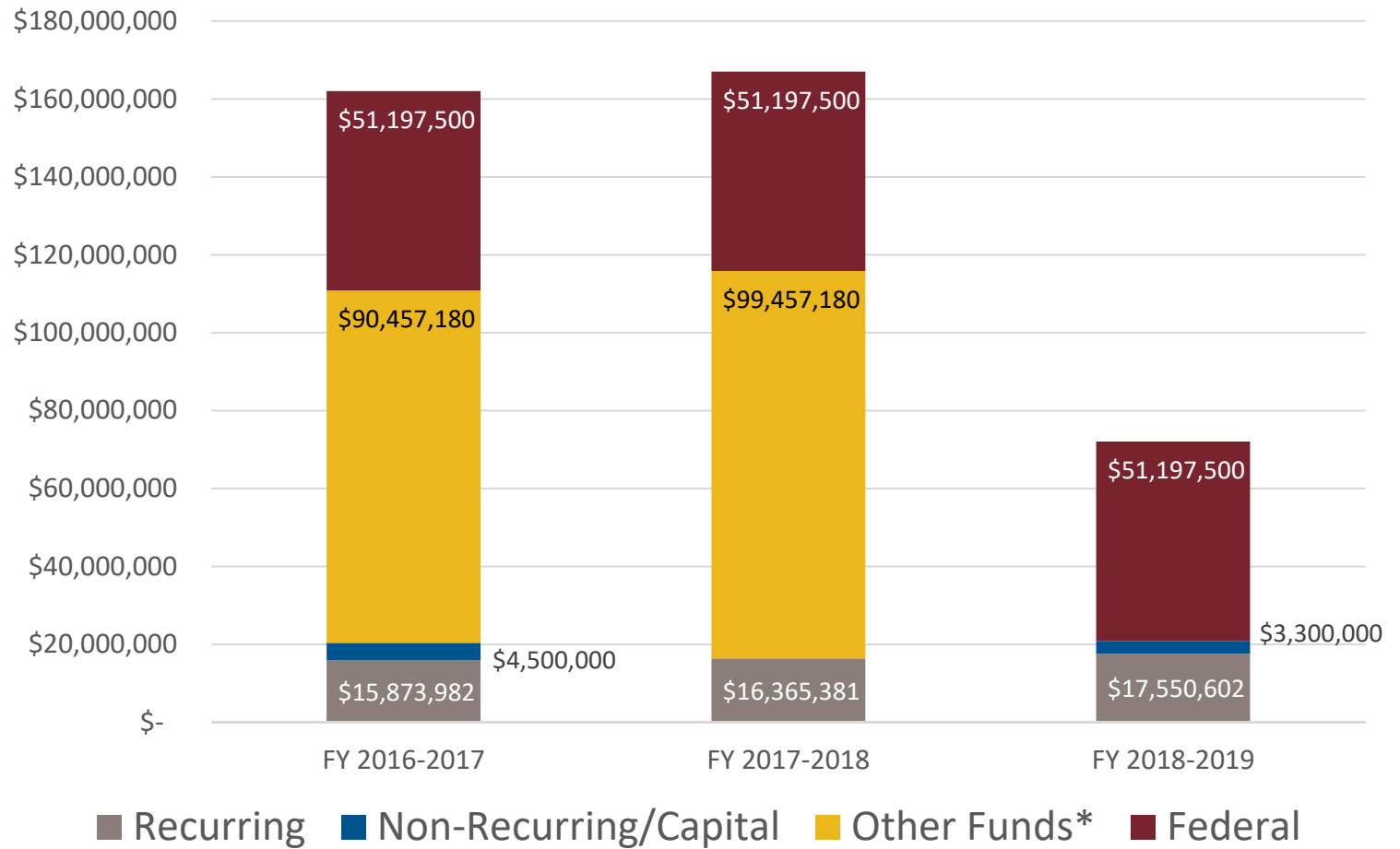
- Underground Steam & Condensate Pipes (\$2M)
- Roofs, Windows, & General Infrastructure (\$4.2M)
- Fire Alarm Replacement / Upgrade (\$1.3M)

Lottery Funds (\$362,400)

- Replacement servers for Banner databases
- Laptops for academic lab hardware refresh
- Workstations for classrooms, faculty, and staff



Appropriations History

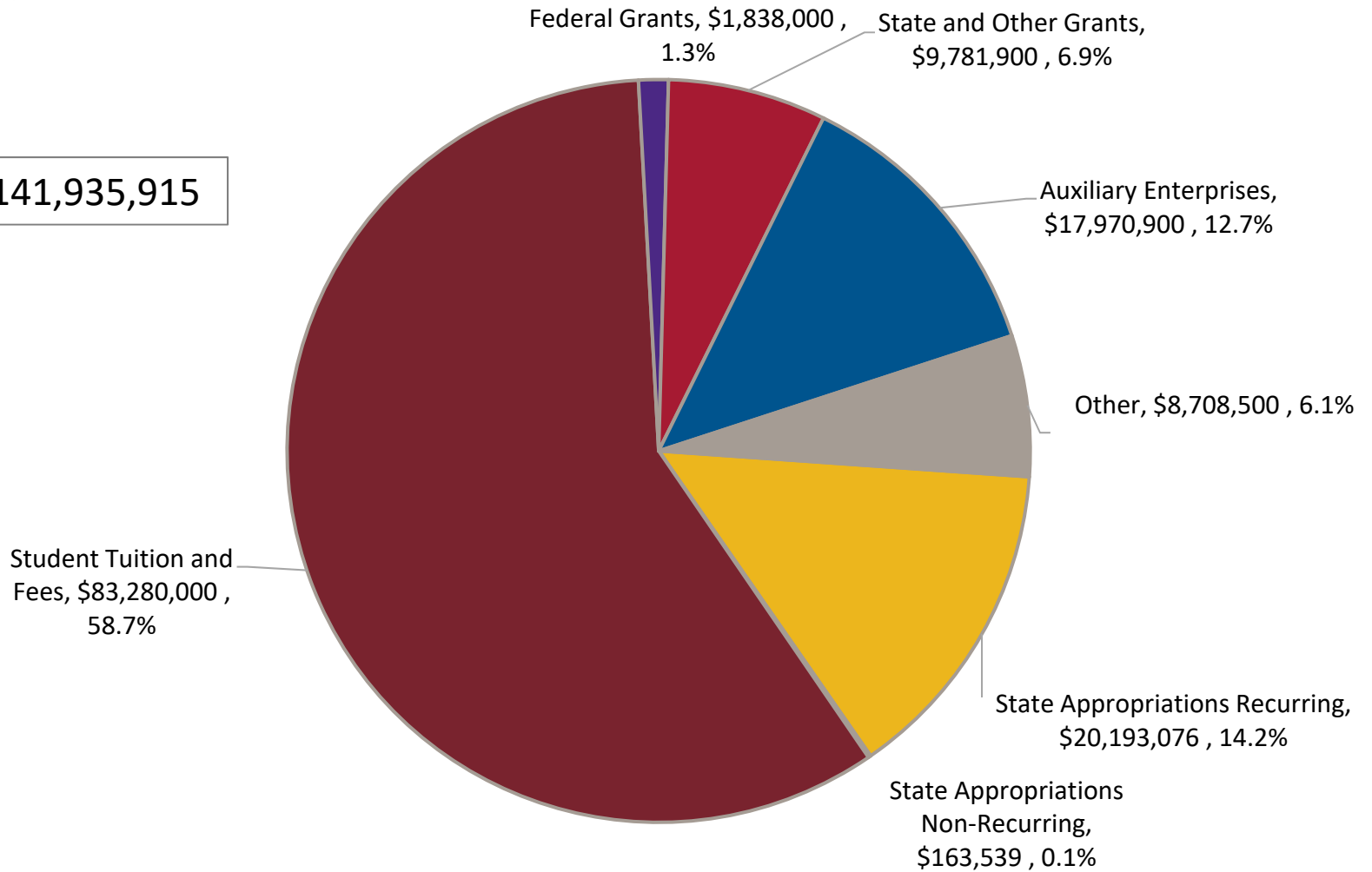


* The "Other Funds" for Higher Education were removed from the state budget bill in FY2018-19.



FY20 Projected Current Revenue

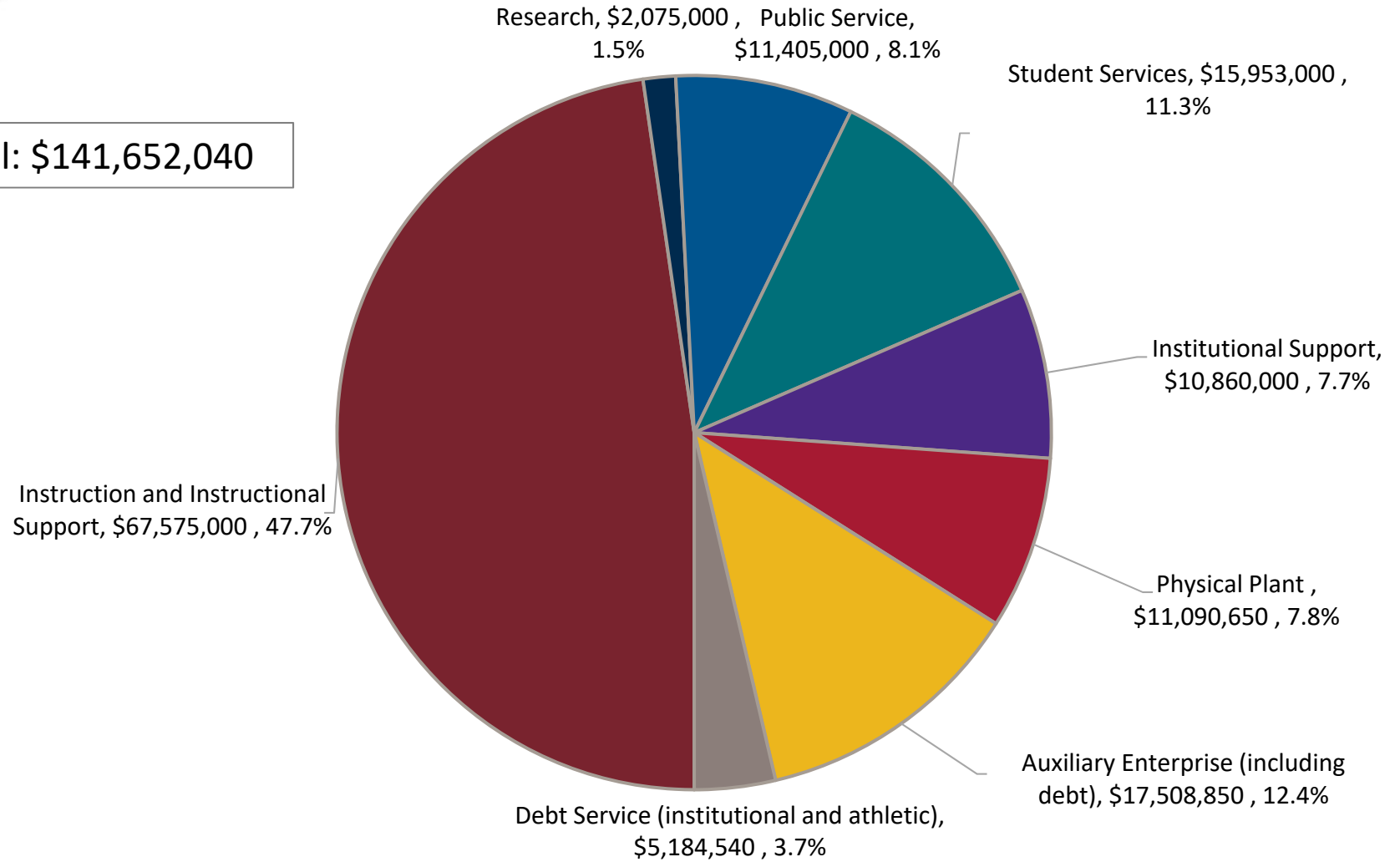
Total: \$141,935,915





FY20 Projected Current Expenses

Total: \$141,652,040





Recurring Requests

Request	Amount Requested	Description of Request
Four (4) FTEs to support programming in three areas that address student support, pre-college programs, and transfer pathways	\$280,000	<ul style="list-style-type: none">• Dual enrollment/bridge program coordinator (1)• Professional advisors to promote success initiatives and provide specialized support to military, adult, and undeclared students (2)• Professional transfer advisor (1)
Operational Support for STEAM Disciplines	\$2,000,000	<ul style="list-style-type: none">• In support of Winthrop's commitment to promote access and degree attainment and to enhance the learning experience for our students, funding is requested to support students in the STEAM fields by continuing to provide up-to-date software, digital security, and new digital equipment/technology



Non-Recurring Requests

Request	Amount Requested	Description of Request
Instructional Scientific Equipment Replacement	\$2,230,000	<ul style="list-style-type: none">Replace equipment and associated software in biology, chemistry, human nutrition, and exercise science



Non-Recurring Capital Requests

Request	Amount Requested	Description of Request
Maintaining Campus Infrastructure	\$11,600,000	<ul style="list-style-type: none"> • Building roofs & envelope, mechanical & plumbing, and electrical in 7+ buildings on campus (\$10.3M) • Improve Wi-Fi coverage in classroom facilities (\$1.3M)
Arts & Technologies Facility Additions/Renovations	\$9,000,000	<ul style="list-style-type: none"> • Upgrade our existing infrastructure and build an interdisciplinary technology facility (approximately 21,500 s.f.) to support student experiential learning for career preparation in the expanding music, performance, and software industries
Winthrop University Science Complex Renovation	\$9,000,000	<ul style="list-style-type: none"> • Renovate and expand the Science Complex facilities (Dalton Hall and Sims Hall) by adding teaching labs, classrooms, faculty offices, and research lab space and by refurbishing four teaching labs



Non-Recurring Capital Requests (con't)

Request	Amount Requested	Description of Request
Dacus Library Renovation	\$7,000,000	<ul style="list-style-type: none">Respond to increased use and expanded services by improving the building's infrastructure and technology offerings
Winthrop University Science Complex Addition	\$23,000,000	<ul style="list-style-type: none">Add to the Dalton Hall Life Science facility to create additional teaching labs, classrooms, faculty offices, and research labs



Other Funds & Federal Funds Request

Funding Source	Amount Requested	Description of Request
Other	\$37,000,000	<ul style="list-style-type: none">• Authorization Transfer of Federal to Other Authorization for Direct Lending• Transfer request to appropriately align Student Direct Loan Program funding from the University's Federal Authorization to the Other Funded Authorization• The student loans drawn on behalf of students are not considered Federal revenues to the University
Federal	(\$37,000,000)	



FTE Request

Winthrop University requests four (4) FTEs to support programming in three areas that address student support, pre-college programs, and transfer pathways:

- Dual enrollment/bridge program coordinator (1)
- Professional advisors to promote success initiatives and provide specialized support to military, adult, and undeclared students (2)
- Professional transfer advisor (1)

Funding: Winthrop is requesting the State provide additional recurring dollars in FY2020-21 to support these FTE's.



Winthrop has submitted no proviso requests.

General Provisos

Winthrop Requests to “Keep”

117.7 Fee Increases
117.8 State Institutions – Revenues & Income
117.11 Fixed Student Fees
117.14 FTE Management
117.15 Allowance for Residences & Compensation Restrictions
117.16 Universities & Colleges – Allowance for Presidents
117.20 Travel – Subsistence Expenses & Mileage
117.29 Base Budget Analysis
117.44 Parking Fees
117.46 Insurance Claims
117.58 Purchase Card Incentive Rebates
117.70 Reduction in Force/Agency Head Furlough
117.71 Printed Report Requirements
117.82 Bank Account Transparency & Accountability
117.110 Information Technology & Information Security Plans
117.117 Statewide Strategic Information Technology Plan Implementation



Appendix



Student Enrollment

Total Enrollment

- 5,865 Headcount (5,813 in Fall 2018)
- 4,982* Full-time Equivalent Enrollment (5,103 in Fall 2018)

Undergraduate

- 4,764 headcount (4,887 in Fall 2018)
- 41% Pell Grant Recipients
- 44% Minority/International

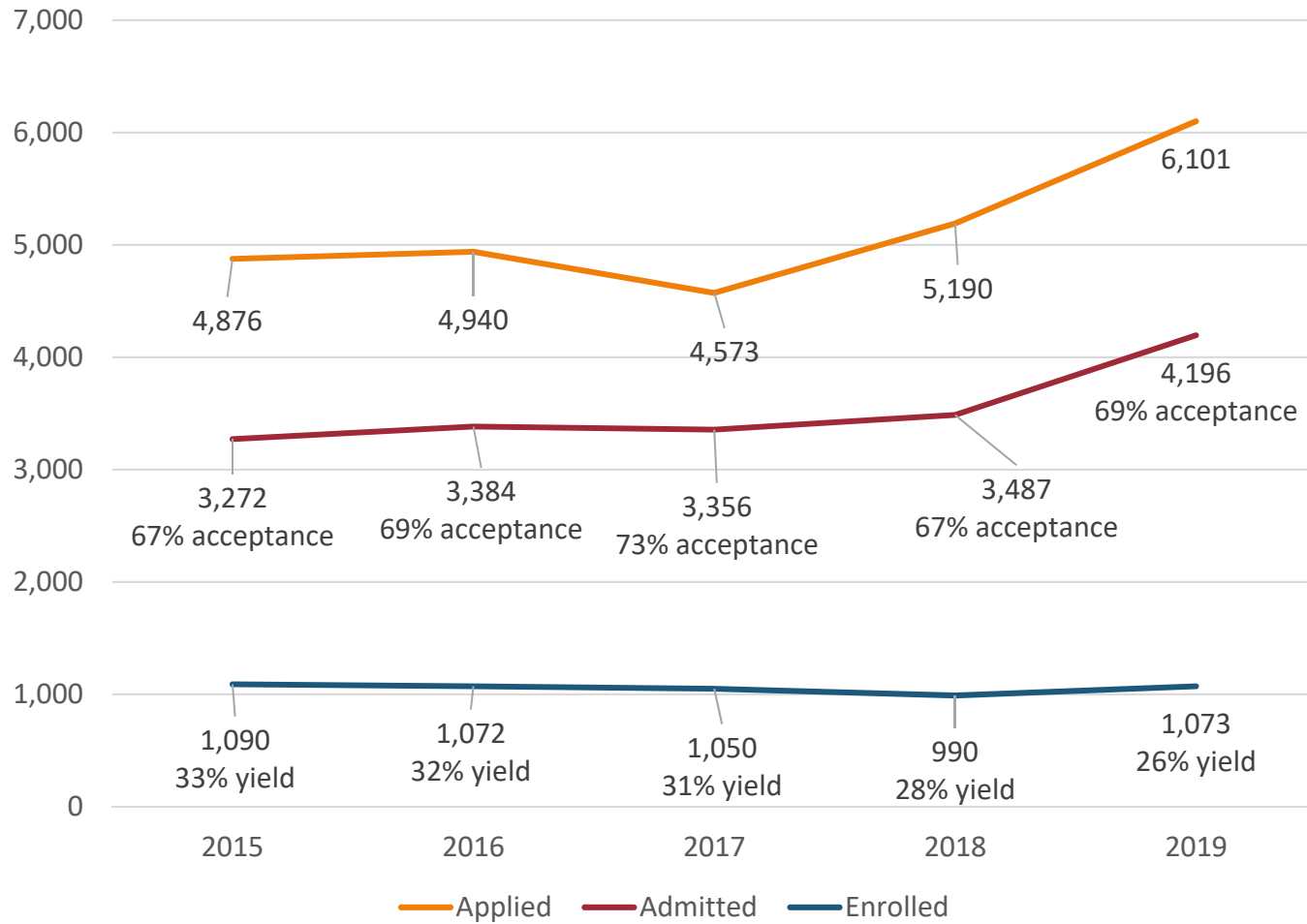
New Freshmen

- 1,073 (991 in Fall 2018)
- 48% Pell Grant Recipients
- 51% Minority/International

*Estimated. Official FTE enrollment has not yet been published by CHE.



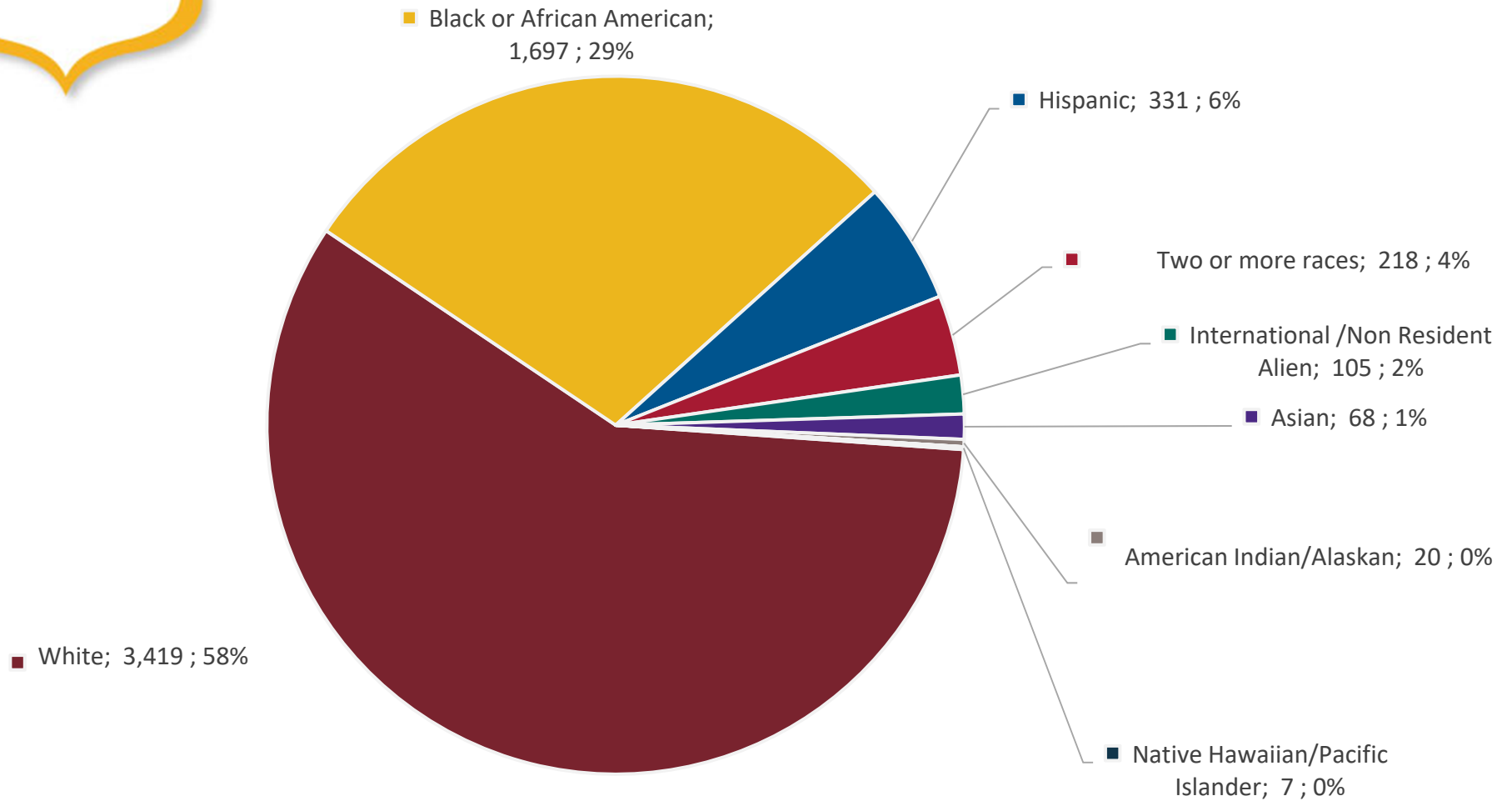
Applied, Admitted, Enrolled



Source: Admissions Standards for First-Time Entering Freshmen reported to CHE annually.

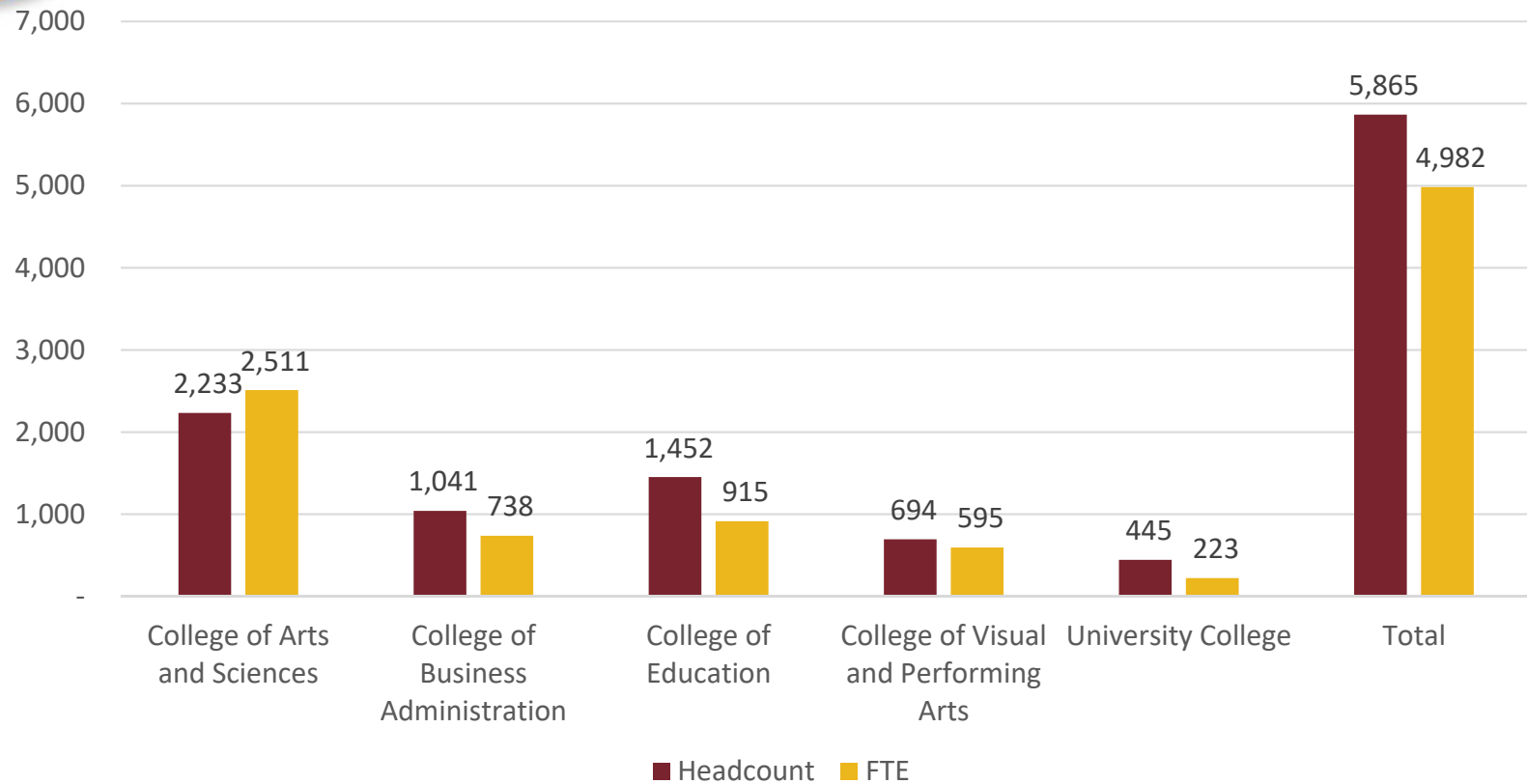


Minority Enrollment Fall 2019





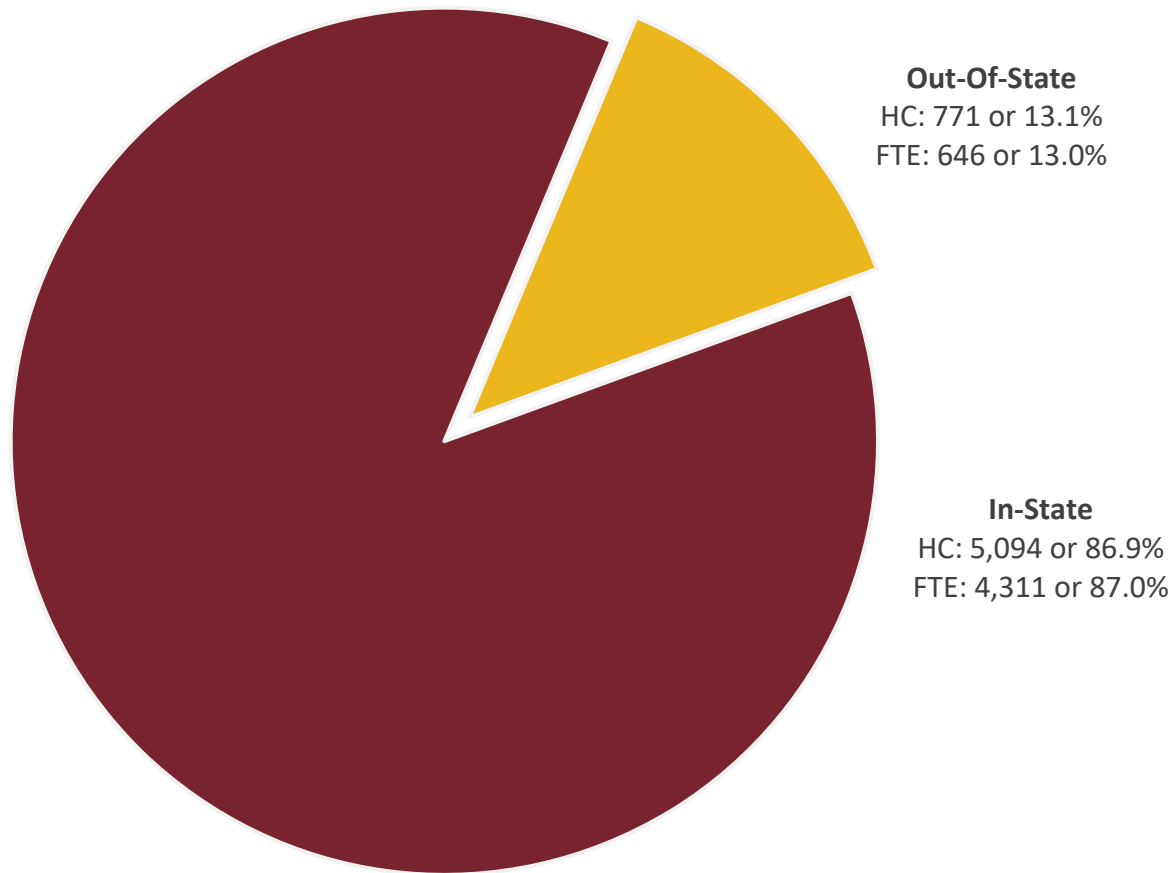
Enrollment by College Fall 2019



*Source: Headcount enrollment based on fall data submitted to Commission on Higher Education. Headcount data reflect enrollment based on student major/college. FTE enrollment calculated by dividing total credit hours produced in a discipline/college by 15 for undergraduate and 12 for graduate students. FTE is estimated. Official FTE enrollment has not yet been published by CHE.



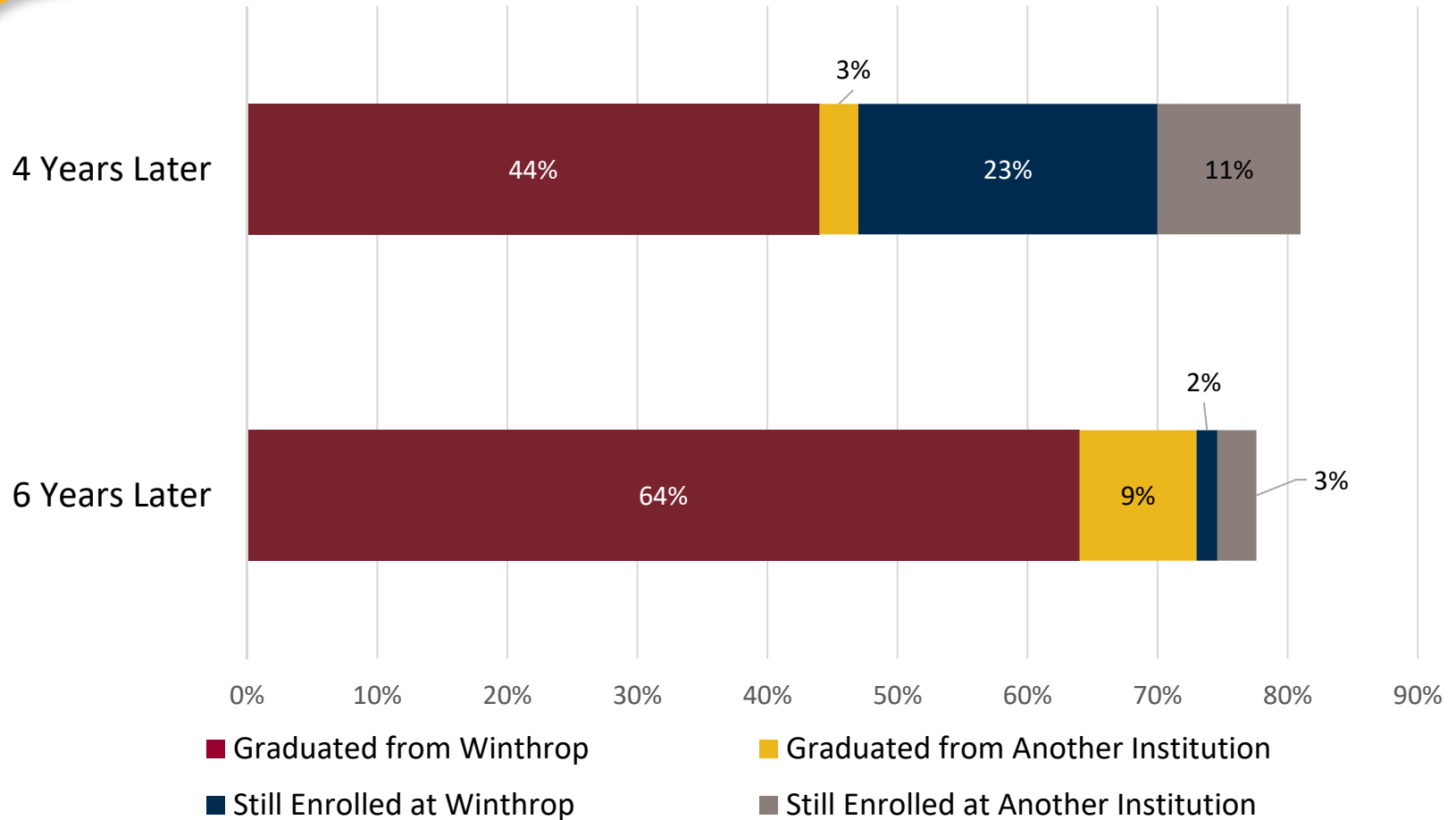
In-State vs. Out-of- State Fall 2019 Enrollment



Note: The method for calculating FTE is the method used by the Common Data Set (and others) -- full-time plus one-third of part-time headcount.



Graduation Data for 2013 Cohort

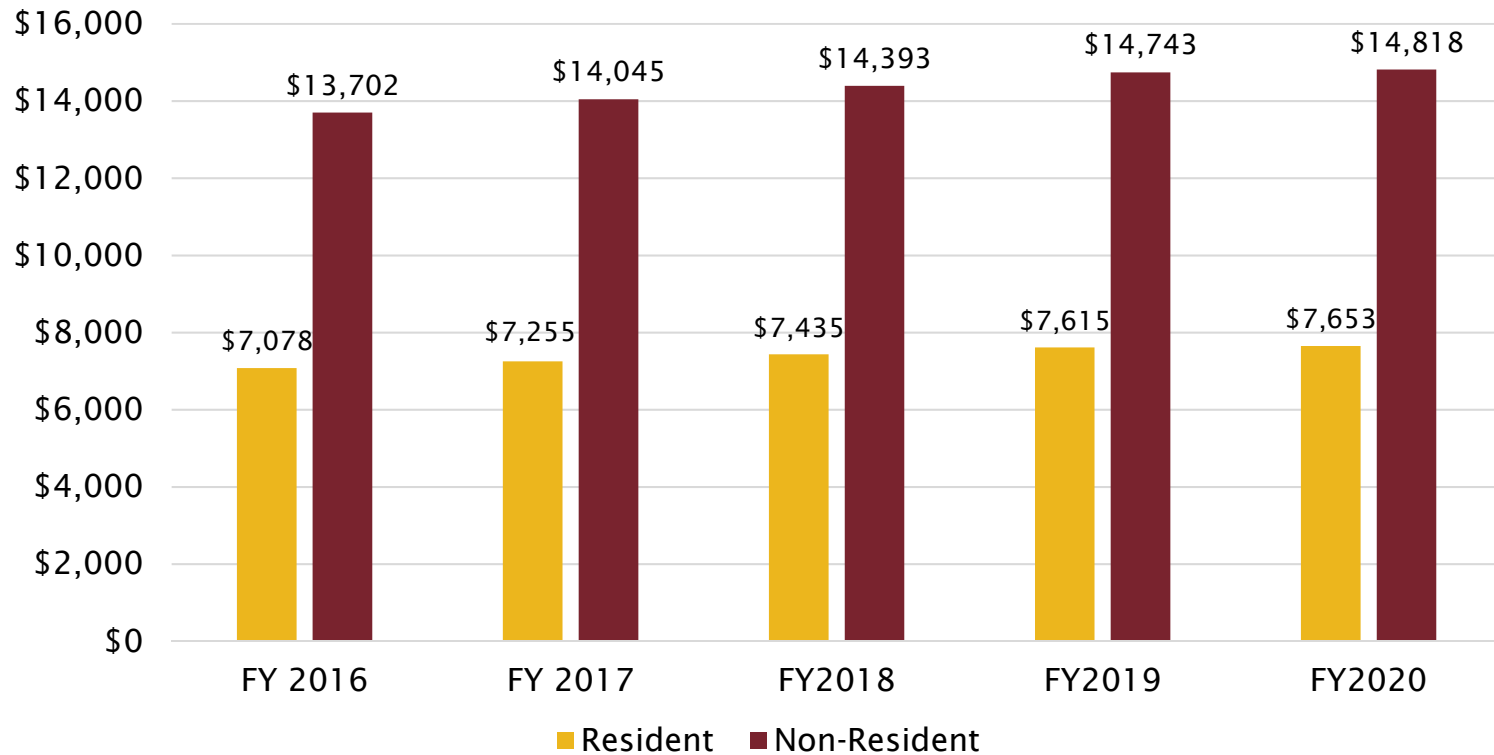


Per Alumni Office more than 38,000 alumni live in South Carolina.



Tuition and Fees per Semester Undergraduate

FY15 - FY16 Increase 2.49%	FY16 - FY17 Increase 2.5%	FY17 - FY18 Increase 2.48%	FY18 – FY19 Increase 2.4%	FY19 – FY20 Increase 0.5% *
----------------------------------	---------------------------------	----------------------------------	---------------------------------	-----------------------------------





2019-20 Tuition & Fee Schedule

Full-time Undergraduate Fees per Semester *	Resident	Non-Resident
E & G Operating	\$6,165	12,744
Information Technology	\$155	\$155
Student Activity	\$790	\$790
Debt Service Institutional Bonds (tuition)	\$521	\$1,107
Debt Service Revenue Bonds (athletic)	\$22	\$22
Total	\$7,653	\$14,818
% Increase from Previous Year	0.5%	0.5%

*Based on 12 or more credit hours



2019-20 Tuition & Fee Schedule

Full-time Graduate Fees per Semester*	Resident	Non-Resident
E & G Operating	\$6,171	\$12,679
Information Technology	\$155	\$155
Student Activity	\$790	\$790
Debt Service Institutional Bonds (tuition)	\$521	\$1,107
Debt Service Revenue Bonds (athletic)	\$22	\$22
Total	\$7,659	\$14,753
% Increase from Previous Year	1.0%	1.0%

*Based on 12 or more credit hours



Scholarships and Grants

	2018-19	
	Students	Dollars
FEDERAL		
PELL Grant	2,080	\$9,449,465
SEOG Grant	461	\$223,126
TEACH	76	\$247,999
Total	2,617	\$9,920,590
STATE		
LIFE Scholarship	1,871	\$8,880,383
Life Scholarship Enhancement	173	\$417,393
Palmetto Fellows Scholarship	305	\$2,208,831
Palmetto Fellows Enhancement Scholarship	65	\$153,467
HOPE Scholarship	330	\$841,400
SC Need Based Grant	979	\$1,837,247
SC Need Based Grant - CTP Students	8	\$52,500
National Guard Grant	13	\$45,000
Teaching Fellows (loan forgive w/ work in-state)	117	\$633,731
SC Foster Care Youth Program	1	\$2,000
Total	3,862	\$15,071,952
INSTITUTIONAL SCHOLARSHIPS & GRANTS		
Merit	2,115	\$8,093,642
Athletic & Talent	400	\$2,956,574
Named Restricted	744	\$1,472,773
Public Service	126	\$1,908,871
Total	3,385	\$14,431,860



Outstanding Debt

	Original Principal Issue Amount	Principal Balance Remaining 06/30/19	FY2020 Annual Debt Service	FY2021 Annual Debt Service	FY2022 Annual Debt Service	FY2023 Annual Debt Service	FY2024-2030 Annual Debt Service
STATE INSTITUTION BONDS							
Repayment Source - Student Debt Service Fees							
Series 2009A State Institution Bond (To construct the DiGiorgio Campus Center)	13,850,000	0	0	0	0	0	0
Series 2012D State Institution Bond (To refund \$14.7M of State Institution Bonds Series 2001B5, 2003C, 2004A1 and 2005B)	13,140,000	5,435,000	2,066,750	2,087,000	1,821,750	0	0
Series 2012E State Institution Bond (To renovate, repurpose, and perform other deferred maintenance projects on campus)	2,245,000	1,090,000	244,025	239,025	243,775	242,775	240,875
Series 2013A State Institution Bond (To renovate, repurpose, and perform other deferred maintenance projects on campus)	3,045,000	1,960,000	323,750	323,750	322,025	323,400	964,300
Series 2016B State Institution Bond (a) (To refund \$23.7M of State Institution Bonds Series 2005B, 2006A, 2008B and 2009A)	20,290,000	19,480,000	2,419,000	2,421,750	2,420,750	3,541,000	13,857,500
Subtotal State Institution Bonds	\$ 52,570,000	27,965,000	5,053,525	5,071,525	4,808,300	4,107,175	15,062,675
(a) This debt was issued to refund outstanding General Obligation Bonds Series 2005B, 2006A, 2008B and 2009A. The University completed the refunding to reduce total debt service payments over the next 13 years by \$3,425,502.							
ATHLETIC FACILITY BONDS							
Repayment Source - Student Debt Service Fees							
Series 2001A5 Athletic Fac Rev Bonds (To renovate athletic facilities, including the Baseball Park, Coliseum, Softball Complex and Soccer Fields)	\$ 2,400,000	240,000	131,016	125,508	0	0	0
Subtotal Athletic Facilities Revenue Bonds	2,400,000	240,000	131,016	125,508	0	0	0



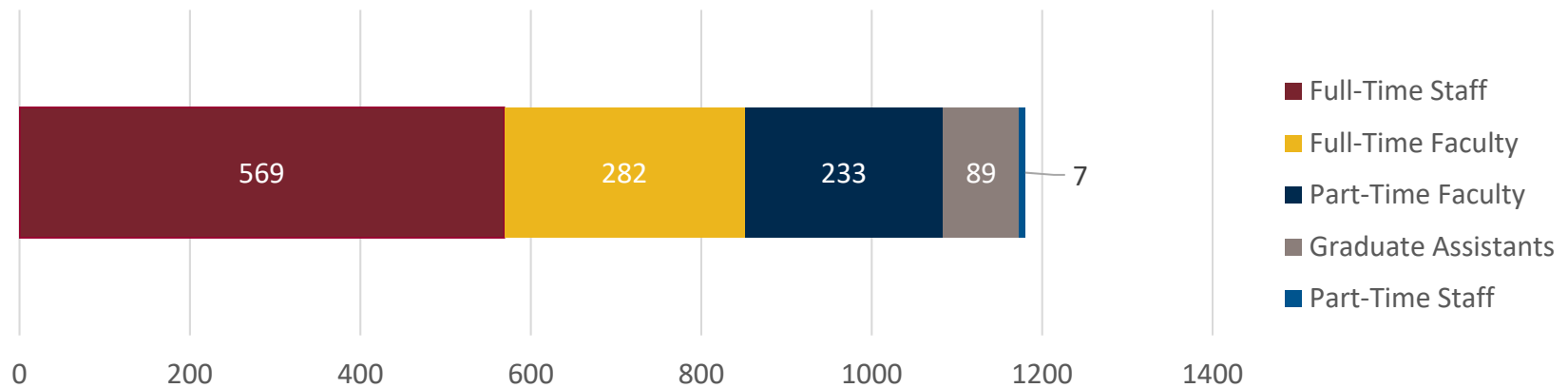
Outstanding Debt

	Original Principal Issue Amount	Principal Balance Remaining 06/30/19	FY2020 Annual Debt Service	FY2021 Annual Debt Service	FY2022 Annual Debt Service	FY2023 Annual Debt Service	FY2024-2030 Annual Debt Service
HIGHER EDUCATION FACILITIES							
Repayment Source - Auxiliary Revenues							
Series 2016A Higher Ed Fac Rev Bonds (b) (To refund \$7,275,000 of Higher Ed Rev Bonds Series 2009A and 2011)	7,735,000	4,850,000	1,193,101	1,181,985	1,180,677	1,168,986	377,103
Series 2016B Taxable Higher Ed Fac Rev Bonds (c) (To refund \$1,335,000 of Taxable Higher Ed Rev Bonds Series 2009B)	1,365,000	890,000	195,988	191,024	191,060	195,950	195,548
Subtotal Higher Education Facilities Revenue Bonds	\$ 9,100,000	5,740,000	1,389,089	1,373,009	1,371,737	1,364,936	572,651
(b) This debt was issued to refund outstanding Higher Ed Facility Revenue Bonds Series 2009A and 2011. The University completed the refunding to reduce total debt service payments over the next 8 years by \$476,192.							
(c) This debt was issued to refund outstanding Taxable Higher Ed Facility Revenue Bonds Series 2009B. The University completed the refunding to reduce total debt service payments over the next 8 years by \$200,309.							
NOTES PAYABLE							
Note Payable to SC Office of Regulatory Staff (ORS) (To upgrade 4-court lighting in West Center to LED and allow for auto dimming/off) Repayment Source - General Operating Funds	\$ 61,505	61,505	8,216	8,216	8,216	8,216	32,864
Subtotal Notes Payable	61,505	61,505	8,216	8,216	8,216	8,216	32,864
STATE MASTER LEASE PROGRAM							
Repayment Source - Student Debt Service Fees							
\$2M FY12 Scientific Equip M Lease (To purchase certain biology and chemistry scientific equipment)	2,000,000	0	0	0	0	0	0
\$2M FY13 Instructional Equip M Lease (To purchase instructional equipment and software)	2,000,000	304,013	311,096	0	0	0	0
\$2M FY18 Instructional Equip M Lease (WFargo - To purchase University instructional equipment for: Exercise Sci, West Ctr Gym, CVPA, Arts & Sci, Lowenstein)	2,000,000	1,740,036	322,623	322,623	322,623	322,623	645,245
Subtotal Master Leases Payable	6,000,000	2,044,049	633,719	322,623	322,623	322,623	645,245
TOTAL DEBT SERVICE PAYMENTS	\$ 70,131,505	36,050,554	7,215,565	6,900,881	6,510,876	5,802,950	16,313,435



Employees

Winthrop has 1,180 employees and a total annual payroll of \$57M

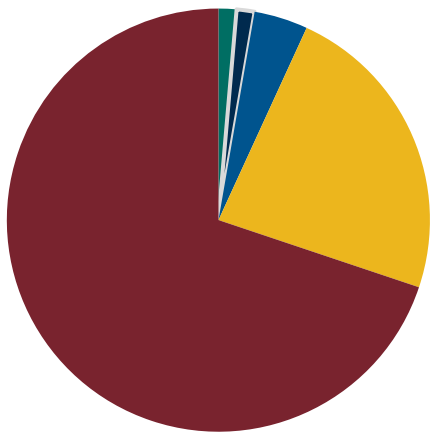


	Authorized	Vacant
State FTEs	442.96	37.44
Other FTEs	358.02	29.31
Federal FTEs	6.8	-
Total FTEs	807.78	66.75



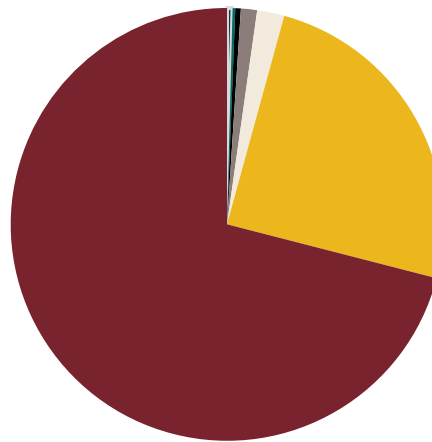
Minority Representation

Administration
Headcount by
Race/Ethnicity



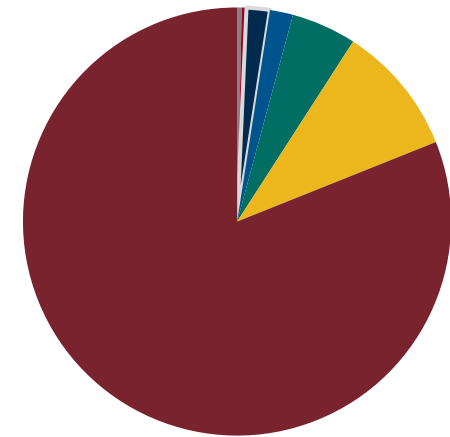
- Asian, 1
- Two or more races, 1
- Hispanic, 3
- Black or African American, 17
- White, 51

Staff Headcount
by Race/Ethnicity



- International, 2
- Asian, 1
- International/ Non-Resident, 2
- Two or More, 6
- Hispanic, 10
- Black or African American, 122
- White, 350

Faculty Headcount
by Race/Ethnicity



- American Indian/Alaskan, 1
- Native Hawaiian/Pacific Islander, 1
- International, 5
- Hispanic, 5
- Asian, 14
- Black or African American, 28
- White, 231



4% Tuition Waivers

	2016-17			2017-18			2018-19		
4% Tuition Waivers	HC	R	NR	HC	R	NR	HC	R	NR
Freshman	48	32	16	46	33	12	43	33	10
Sophomore	47	32	15	46	34	12	44	34	10
Junior	51	34	17	51	37	14	53	41	12
Senior	57	38	19	58	43	16	56	44	12
Total	203	136	67	201	147	54	196	152	44

	2016-17			2017-18			2018-19		
Full Abatements	HC	R	NR	HC	R	NR	HC	R	NR
Freshman	114	0	114	111	0	111	88	0	88
Sophomore	73	0	73	98	0	98	98	0	98
Junior	79	0	79	91	0	91	115	0	115
Senior	60	0	60	71	0	71	85	0	85
Total	326	0	326	371	0	371	386	0	386
Partial Abatements	HC	R	NR	HC	R	NR	HC	R	NR
Freshman	3	0	3	0	0	0	5	0	5
Sophomore	2	0	2	3	0	3	0	0	0
Junior	8	0	8	1	0	1	1	0	1
Senior	24	0	24	11	0	11	0	0	0
Total	37	0	37	15	0	15	6	0	6



Merit Award Abatements

Policies pursuant to 59-112-70 (A)

- In accordance with Section 59-112-70, the Board of Trustees of Winthrop University has authorized the abatement of any part or all of the out-of-state differential rates for out-of-state students who are recipients of scholarship aid.
- 196 undergraduates received abatements for Academic Year 2018-19.

Policies pursuant to 59-112-70 (C)

- Winthrop University's Board of Trustees has no formally approved agreements with international institutions pursuant to Section C of 59-112-70.



Capital Projects

Winthrop currently has three active PIP projects:

- Music Conservatory / Byrnes Auditorium, project number 9579 funded by non-recurring. Current balance is \$3,515,169 (**On-Hold**).
- Byrnes Fire Restoration, project number 9580 funded by insurance. Current budget is estimated at \$3.8M.
- General Building Infrastructure/ Building Envelope Upgrade, project number 9581. Current balance is \$4,350,000.



Maintenance

Winthrop addresses maintenance needs by the following methods:

- Campus constituents fill out a project request form which includes project details such as roof repairs and replacement, fire alarm replacements, painting, electrical and small facility changes to accommodate programs.
- These projects are given budget estimates and prioritized by senior leadership to complete as time and funding permits.
- Facilities maintains a rolling project list which includes facility maintenance and repair needs.

In FY 2018-19, Winthrop spent \$5,607,644 on maintenance needs. Winthrop has ongoing projects for an additional \$20.7M funded from State Appropriations, Federal Awards, Gifts, and Insurance proceeds.



Thank you

