

UMW Mission Statement *(No change to UMW's 2017 Six-Year Plan submission.)*

(Adopted on November 20, 2010 by the Rector and Visitors of the University of Mary Washington - Approved by SCHEV on January 15, 2014. Currently, there are no plans to change UMW's mission statement.)

The University of Mary Washington is one of Virginia's outstanding public liberal arts universities, providing a superior education that inspires and enables our students to make positive changes in the world.

The University is a place where faculty, students, and staff share in the creation and exploration of knowledge through freedom of inquiry, personal responsibility, and service. UMW regards the provision of high-quality instruction as its most important function. The University offers a wide range of undergraduate and graduate programs focusing on both disciplinary and interdisciplinary studies. These academic programs afford students opportunities to integrate and apply their knowledge within broad educational experiences, to develop their professional interests, and to practice the habits of mind necessary for life-long learning. Through a professionally engaged faculty, the University supports ongoing research appropriate to the development of student abilities and faculty interests. It especially encourages the participation of undergraduates in research.

UMW's size, dedicated faculty, and historical commitment to fine teaching create an institutional culture where both undergraduate and graduate students benefit from strong connections with their faculty and multiple opportunities for active learning.

Located in Fredericksburg, between our nation's capital and the capital of the Commonwealth of Virginia, the University of Mary Washington is a nexus for engagement among diverse communities and is dedicated to supporting professional advancement and economic development and to improving the regional quality of life.

We fulfill our mission by fostering students' intellectual and creative independence, facilitating their immersion in local, regional, national, and international communities, and by inculcating the values of honor and integrity. UMW graduates are models of adaptive learning, personal achievement, responsible leadership, service to others, and engaged citizenship in a global and diverse society.

Elaboration of 2018 Six-Year Plan Strategies (*Reflects updates to the 2017 six-year plan.*)

1. Enhance the Career and Professional Development Center

The Center for Career and Professional Development, is located just off the “living room” of the new University Center. It is a place where UMW’s institutional capacities converge to support and inform student transitions from college to career and the world of work. Its central placement symbolizes the University’s core belief that a liberal arts and sciences education prepares students for meaningful post-graduation opportunities in the constantly changing job market. The Center is evolving as a place where students, alumni, employers, and academic programs converge in a variety of programs, opportunities, and services related to career and professional development. The Center works with students to develop educational and occupational plans and skills that will prepare them for productive lives after college. In order for the Center to maximize effectiveness on these objectives, a new full-time director, support staff, and a significant operating budget are required. These investments will help foster essential connections with employers that will provide productive pathways for UMW students into internship and career opportunities.

The university’s 2018-19 operating budget includes funding to support a new position that will serve as Director for the Center for Career and Professional Development. This position is currently under recruitment.

Additional general fund support has been appropriated for 2019-20, which will be used to hire career coaches, train and support career advisors and provide operating support for the Center to develop a network and pipeline to potential employers.

2. Increase Academic Support for Adult and Continuing Education Students

In order to provide increased service and support to “non-traditional” students and address professional development needs in the regional workforce, UMW will enhance its efforts to serve this population of students and career professionals. Using new general fund support provided in 2017-18, UMW created and filled the position of Executive Director of Continuing and Professional Studies in July 2017. As a first step, and following results of market research, UMW will target new resources to programs that are shown to have the greatest potential for meeting the academic needs of the large adult education population in the region, including veterans and other non-traditional students. Additional advising support, especially “walk in” advice and assistance, will be made available. Options for developing the course schedule flexibility and convenience suited to working adults (e.g., evening, weekend, on-line, hybrid, low-residency, 8-week semesters) will be carefully examined and implemented.

The Executive Director recently negotiated a master service agreement between the university and Mary Washington Healthcare for the purpose of providing a variety of leadership development programming and speakers for the hospital and its employees; an additional staff position has been filled to support program development and

implementation; and, a market study is underway to determine regional professional development needs.

3. Selectively Expand Graduate Programs

The university will increase efforts to identify, recruit and enroll additional graduate students. These efforts will include the identification of emerging markets and demographic shifts in order to meet the graduate education needs of the region. *One program UMW had sought to develop, in collaboration with Mary Washington Healthcare, was a Master of Nursing degree. After receiving word that SCHEV staff had elected not to recommend approval of this program to the State Council, UMW and our collaborators at Mary Washington Healthcare agreed to withdraw this proposal. Building on existing strong five-year models, UMW will explore in the coming years those fifth-year programs in fields in demand that lead from our undergraduate majors into graduate degrees.*

4. Expand and Enhance the Use of Technology

Funding estimates for this item will support technology enhancements in four broad areas, with clear priority given to those that directly support students.

A. The first area for technology enhancement is focused on student success and includes the following components:

- (1) Implement SSC Campus: SSC Campus (Student Success Collaborative) is a web-based student performance monitoring system that provides automated student services and communication between faculty, academic support services and students. *Implemented at \$35,000 annually.*
- (2) Implement Guide: Guide is a mobile application that helps students navigate roadblocks to graduation and provides a communication platform to reach students with direct, timely, and individually tailored messages. *Implemented at \$74,000 annually.*
- (3) Procure a Degree Planning Tool: UMW previously used Banner CAPP (Curriculum, Advising and Program Planning) for degree planning and audit. While CAPP provided some value to the degree planning process, it became increasingly obsolete and needed to be replaced with a more full-featured, user-friendly product. Many competitors in the Commonwealth have transitioned to Degree Works (including William and Mary, George Mason, VCU, and ODU).

UMW transitioned to Degree Works in summer 2018 at a one-time cost of \$175,000 and ongoing maintenance costs of \$10,000. Students will benefit from Degree Works through real-time advice and counsel and a clear road map to graduation. Advisors will have access to real-time delivery of academic advice, consistent degree plans, reduced paperwork, and uniformity.

- (4) Procure Data Analytics Platform: UMW has no coherent, comprehensive, or compelling system for using extant student information resources to make informed decisions. Much like the imperative to build a CRM for managing relationships with prospective students in admissions, we need to use data insights to support institutional performance and maximize student success. A student data analytics platform would provide critical tools to make data-informed decisions for both individual students and larger subgroups. Specifically, it would: (1) enhance administrative decision making by providing executive-level tools for reporting and judging effectiveness at the university, college, or program level; (2) support institutional efforts with respect to student success (retention and graduation), help us improve the quality of the student experience for individual students, and support timely interventions; (3) provide all academic advisors with an advising dashboard containing a host of easily accessible information resources to help students make good decisions about their academic plan; and (4) assist in making resource allocations decisions to target the highest ROI students. (\$150,000 one-time start-up and \$60,000 annually). *Funding for this component has been delayed until 2019-20.*
- (5) Implement an integrated curriculum management and catalog production software application suite that supports a unified workflow from the curriculum approval process through production and maintenance of the academic catalogs. Implementation of this technology would replace UMW current homegrown solutions, which operate in separate phases and are highly labor intensive. Instead of a separate University Curriculum Committee web site for curriculum approvals, and separate online and print catalogs, one package would seamlessly bring all phases of the process together. An initial investment of \$150,000 plus an on-going annual cost of \$35,000 would be required. *Funding for this component has been delayed until 2019-20.*
- B. The second broad area of technology enhancements is \$400,000 to support a four-year PC replacement cycle for faculty and staff. Funding for PC replacement was one of the first programs eliminated during funding cuts. Updated and fully functional PCs are a critical component for instruction, support and business operations. The replacement pool will be funded over several years. *The university's 2018-19 operating budget includes an allocation of \$200,000 for this effort with a plan to continue phase-in until full funding is achieved.*
- C. The third component of this item is \$500,000 for ongoing Banner enhancements focused in the areas of Admissions, Financial Aid, Student Records, Academic Support and Finance. The Banner enterprise system affects nearly every aspect of university operations and it is critical to effective and efficient operations that the various modules are up-to-date and fully utilized. *Funding for this component has been delayed until the 2020-22 biennium.*

D. The fourth component of this item is \$475,000 to support the first phase of cloud migration of UMW's applications, data storage and email. The first phase will address cloud migration of Banner, which is UMW's finance, student, and human resources enterprise system. Future migration efforts will expand to other operating applications and include disaster recovery and data back up and mitigation of hardware replacement needs. *The university's 2018-19 operating budget includes an allocation of \$185,000 for costs related to cloud migration with a plan to continue phase-in until full funding is achieved.*

5. Expand Student Support Staff to Optimize Student Success

Achieving the goals of expanded outreach to traditionally underserved populations, and increasing the number of Virginians enrolling in and completing higher education, requires institutions to put in place supports necessary to ensure their success. This involves investing in both personnel and the tools necessary to helping them realize and complete their degrees in a timely fashion. This strategy will enhance all aspects of the University's recruitment and student success efforts with particular emphasis on students with disabilities.

(1) *Hire: Funding was set aside in the university's 2018-19 operating budget to hire an Assistive Technology Specialist, which is a new position in Office of Disability Resources that was filled in July 2018. Technology needs of students with disabilities have increased dramatically since 2012-13 with a 61.76% increase in technology related needs seen by the ODR (an increase from 102 students in fall 2012 to 547 students in spring 2018). In conjunction with advances in assistive technology for students with disabilities and other technological advances that support student learning, there is a need for specialized staffing and expertise within the ODR office relating to technology. This need is all the more critical as we seek to advance several digital-based initiatives. The Disability Coordinator/Assistive Technology Specialist will investigate, and implement new assistive technology and resources for students, assist students with disabilities with their assistive technology needs, disseminate knowledge of assistive technology throughout the university, and help provide resources to support infrastructure interaction with the use of assistive technology. This position will also assist in managing UMW's large and growing caseload of students requiring various disability accommodations (over 10% of UMW's student population is registered for services through the Disability Resources Office). The addition of the ODR Disability Coordinator/Technology Specialist is critical, not only to student success, but also to ensure the University's continued compliance with state and federal disability laws.*

(2) *Hire: Student Success Coordinator (new position in Academic Services). The need for greater institutional support to ensure the success of underrepresented and at-risk students was outlined in the 2015 Federal TRIO grant submission and has been further affirmed by the Secretary of Education. This need is further highlighted by the strategic plan, which calls for increased recruitment and support services for*

underrepresented students. Currently, over 30% of each incoming class is comprised of underrepresented students, based on either race/ethnicity, income level, or first-generation in college status. While the full program envisioned in the TRIO grant proposal is not fiscally possible at this time, it should be possible to make modest progress in this area by vesting coaching responsibilities in a student success coordinator in the office of Academic Services whose portfolio would involve working exclusively with this subpopulation. *Funding for this component has been delayed until 2019-20.*

6. Increase the diversity of our student population, faculty, and staff and promote initiatives that enhance the inclusiveness of the University environment.

As identified in UMW's Strategic Enrollment Plan, the university will increase efforts to identify, recruit and enroll students from underrepresented populations. These efforts will include new initiatives targeted to Hispanic students, increasing the number of students in the Rappahannock Scholars Program, creating new pipelines for first generation students, students whose families are economically disadvantaged, Pell eligible students, and students from underserved areas including the Northern Neck.

The university's 2018-19 operating budget includes funding for a new Vice President for Equity and Access. This position, which has already been filled, will develop and implement a plan for assessing the current university climate of inclusion and identify programs and initiatives that will enhance and sustain an inclusive environment for students, faculty, and staff. Recruiting and retaining diverse faculty is particularly competitive and require the allocation of additional resources targeted toward this effort.

7. Integrate Digital Environment and Academic Programs

The digital environment is an integral part of the global work, educational, creative, social, and communications environment. UMW will expand and enhance teaching and learning within a digital environment across all disciplines and appropriate programs. Included in this initiative are efforts to ensure that all digital course content is fully accessible. This initiative also includes full implementation of the Domain of One's Own project, which aims to help students think about and work in a technological world in an increasingly self-aware, deliberative, and thoughtful way. Also included in this initiative is the funding required to support growth of online programs and courses that will expand access to the University's programs, particularly for non-traditional students. Cost estimates for these initiatives, and resources needed to make digital course materials fully accessible for persons with visual and/or auditory learning impairments, total \$600,000 over six years. *The university's 2018-19 operating budget includes support for a new Lead Instructional Designer position. This position, which has already been filled, will assist faculty in developing fully on-line courses targeted to the university's adult degree completion program. Additional funding to support this effort beyond the addition of the Lead Instructional Designer position will be delayed until 2019-20.*

8. Establish and Promote Academic Areas of Distinction

UMW has outstanding opportunities that with further development, support, and promotion will provide expanded opportunities for students to apply their knowledge and develop professionally through enriched field experiences that make specific use of the University's location and our other regional resources, as well as bring greater visibility and recognition to the University. This strategy will *enhance a number of ongoing programs of distinction* that could achieve even greater results with increased support. These programs produce demonstrably positive results in increased student engagement, student academic and professional success, and increased alumni giving from students who participated in these initiatives. Additional funds will be allocated to continue UMW's distinctive programming for: (1) undergraduate research activities, (2) increased service learning activities, and (3) fine arts programming.

The estimated funding requirement to support this initiative is \$250,000 allocated over two years. *Although some preliminary planning efforts have been undertaken within existing resources, new funding support has been delayed until 2019-20.*

*The university will be seeking state general fund support for a new **performing arts center and renovation of its fine arts complex**. This project will be the university's top capital priority moving forward and will support a key component of the university's liberal arts mission. In addition to the project funding, additional support will be required for facility maintenance and operating costs.*

9. Continue Development of First-Year Experience Program

UMW's ambitious curricular plan for first-year students reflects a more clearly defined set of integrated learning outcomes in the areas of information literacy, writing, and oral communication that will shape the development of this program. All of the online learning modules that support instruction in the student learning areas are now being used and UMW has expanded and enhanced its living-learning experiences and opportunities. Current assessment data shows increased retention, academic success, and reports of student satisfaction with their UMW experience in the first year student population. *As a first step, UMW has deployed a student-facing mobile technology to enhance the first year experience from on-boarding through orientation and throughout the first year, as well as a degree planning tool to support student academic planning, progress to the degree, and enrollment management.* (See 4.A.2 and 3 above.) As a result of the continued development of the first-year experience program, students will have a stronger foundation upon which to develop the skills necessary to be valued contributors to the 21st century job market. *Additional funding for this initiative beyond implementation of the student-facing mobile technology has been delayed until 2019-20.*

10. Increase T&R Faculty Salaries

UMW, working with a private research firm, conducted a study on teaching and administrative faculty salaries. For teaching faculty, the study compared UMW salaries by

academic discipline with salaries at member institutions in the Council of Public Liberal Arts Council (COPLAC), regional peers and selected aspirational peer institutions. The initial study results indicated that UMW would need to invest a total of \$1.2 million in teaching faculty salaries to close the identified salary gaps. In 2016-17, UMW reallocated \$195,000 in funds to begin to address identified salary gaps and salary compression. The allocation of salary increases was strategically targeted to close the most severe gaps and compressions, and therefore some faculty received a higher increase, some a lower increase, and some faculty no increase at all.

In 2017-18, UMW allocated new funding of \$121,000 to provide either promotion or market adjustments among 114 faculty (out of 251 full-time faculty), for an average increase (among those receiving an increase) of about 1.3%.

In the 2018-19 budget, approximately \$200,000 has been allocated for salary adjustments among 140 full-time faculty, for an average increase (among those receiving an increase) of about 1.7%.

For planning purposes, an additional funding allocation of \$200,000 has been included in the six-year plan as a placeholder for 2019-20.

11. Increase Classified Staff Salaries

State supported salary increases over the last ten years have been minimal and this has affected our generally lower paid classified employees the hardest. Many of our employees in housekeeping, grounds, and entry-level office support staff, barely earn a living wage; particularly in the Fredericksburg area, which shares a higher cost of living similar to the rest of northern Virginia. Low salaries affect employee morale and increase turnover costs. Given the planned increases for faculty, the university has an obligation to treat all of its employees in a fair and equitable manner. In this regard, UMW engaged a private research firm for a salary study focused on classified staff. *Based on the results of that study, the university has set aside funds in its 2018-19 budget to make targeted salary adjustments. Of the 321 classified positions at UMW, 108 employees will receive an average increase of 5% in 2018-19. For planning purposes, the same increase has been included in the six-year plan as a placeholder for 2019-20.*

12. Increase Administrative Faculty Salaries

As indicated in item #10, the UMW faculty salary study included both teaching and administrative faculty positions. Administrative faculty salaries at UMW were compared to similar positions using national and peer benchmarks. The study findings indicate that while many UMW administrative faculty were competitive (primarily at the higher-level positions), many were significantly below the benchmarks. As such, UMW's salary plan for administrative faculty calls for targeted salary adjustments consistent with the study's findings. *Of the 146 administrative faculty positions at UMW, 21 will receive an average*

increase of 5% in 2018-19. For planning purposes, the same increase has been included in the six-year plan as a placeholder for 2019-20.

13. Increase Number of Full-Time T&R Faculty

Using new general funds provided in 2019-20 to support efforts to increase degree production in Data Science and Technology, Science and Engineering, Healthcare and Education programs, UMW will add three full-time teaching faculty positions. Cost of this initiative is \$96,000 per position (salary and benefits), totaling \$288,000 in 2019-20.

14. Increase Quality of and Support for Part-Time Faculty

Pay for adjunct faculty at UMW needs to increase in order to hire the most highly qualified part-time faculty that can bring real-world expertise into the classroom for our students. In many programs (such as business, education, mathematics, psychology, and political science), the curriculum is enriched by bringing in practicing professionals who have an interest in teaching. These part-time faculty will teach selected topics in areas for which they have expertise and will offer students a classroom-to-real world connection. The part-time faculty can also provide valuable networking contacts for our students as they look for internships and jobs. UMW competes for adjunct faculty in the Washington, DC and Richmond area against a number of private universities that pay more than UMW is currently able to pay (our adjunct scale has been increased just twice in the last 10 years (including a projected increase in FY 2018 in which UMW will reallocate \$67,500 (in salaries and benefits) to increase the adjust pay scale by roughly 4.5%. In a number of programs (such as nursing, graduate programs, and technical fields such as computer science), adjunct pay needs to be much higher than it currently is in order to attract the most highly-qualified part-time faculty). An additional \$130,000 over a six-year period is needed to maximize the strategic benefit highly qualified part-time faculty may bring to our curriculum. Finally, the strategic use of part-time faculty will enable the university to more effectively and efficiently address high student demand for particular courses where there is a current shortage of course seats but not sufficient sustained enrollment to justify the hiring of a full-time faculty member. *Additional funding to support this initiative has been delayed until 2019-20.*

15. Enhance Space Utilization Across All UMW Facilities and Campuses

An automated scheduling system is needed to ensure that the university's space on its Fredericksburg, Stafford and Dahlgren campuses is being efficiently scheduled and utilized and will support space needs for classroom instruction, labs, meetings, and events. *The university set aside \$96,000 in one-time funds in its 2018-19 budget to purchase and implement CollegeNet in support of this effort. Annual maintenance costs of \$19,000 will be allocated in subsequent budgets. Also, CollegeNet25Live, an enterprise scheduling system, was purchased in May 2018 and is currently being implemented.*

16. Utility Cost Increase

The cost estimate for this item is in anticipation of annual rate increases for utilities of 5% applied against actual costs.

17. Increase Hourly Rate for Wage Employees

Wage employees are an important component of UMW's overall workforce, many of whom are long-time employees. Similar to other employee groups, UMW has included wage employees in its market studies. Using market gap data for comparable positions, a total of 56 wage employees out of a total of 121 will receive average increases of 5% in 2018-19. A similar amount has been set aside as a placeholder for 2019-20.

Financial Aid (*Updated*)

UMW will continue to provide financial aid help to mitigate the impact of tuition and fee increases on low-income and middle-income student and their families in three specific ways; continuing a “First Dollar” model to aid awarding, continuing to require highest need in our FSEOG formula, and maintaining current EFC cutoffs in our aid strategy.

“First dollar” Awarding Strategy

To mitigate the impact of tuition and fee increases, UMW will continue to use the “first dollar” approach when awarding aid; students will continue to be offered loans last. The order/awarding criteria in which funds are counted toward meeting costs are important. Our awarding parameters call for grants (Federal and State) and outside scholarships to be used as ‘first dollar’ allocations and not “last dollar”.

Our Rappahannock Scholars program is an example of how UMW Foundation dollars and institutional dollars are awarded “first” before loans are offered. The Rappahannock Scholars Program is a partnership between the University of Mary Washington and six high schools in the Northern Neck region of Virginia. Rappahannock Scholars include students from Essex, King and Queen Central, Lancaster, Northumberland, Rappahannock, and Washington and Lee High Schools. Preference for admission to the program is given to under-represented students who would add to the cultural diversity of the UMW student body; students from economically disadvantaged backgrounds as defined by eligibility for the Federal free or reduced lunch program; and, student whose parents have not attained a college or university education.

- ***In 2018-2019 UMW’s Rappahannock Scholars received \$24,592.***

Our Jepson Scholars program is another example of how UMW is leveraging funds to mitigate costs.

Ten Jepson Scholars will enroll this fall as part of the NSF grant program that will provide two paid summer science research experiences and significant scholarships over the next four years of undergraduate enrollment. The staff in the Office of Admissions created a marketing campaign and communication plan to promote to students, parents, and STEM high schools throughout the state and region. In addition, staff coordinated half day visit programs to meet students, introduce them to facilities (including Jepson renovation plans), and interview with faculty.

In summary, 36 students applied for the Jepson Scholars program. Twenty-one candidates met academic criteria, had financial need, and were invited to interview with the selection committee. A total of fourteen were offered a scholarship ranging from \$4,000-10,000 depending on need.

Federal Supplemental Educational Opportunity Grant (FSEOG) Program Awarding

Under FSEOG awarding rules, awarding priority must be given to students who receive Federal Pell Grants, and awards must be made first to students who have the lowest expected family

contributions (EFC). The minimum award is \$100 and the maximum award is \$4,000. Outside of these parameters, institutions have awarding discretion.

- UMW awards all FSEOG funds to student with the highest need (only).
- Our maximum FSEOG award is \$800.

UMW awarded the FSEOG to 187 students in 2017-2018, a 28% increase from 2016-2017.

Family Income

UMW encourages all families to complete the FAFSA, which assists the Office of Financial Aid with identifying possible funding sources across need-based and non-need based programs. Middle and high-income families need solutions for their children's higher education costs, as well as for students with financial need. Our focus is to provide options that limit borrowing and recognize academic achievement.

Our need-based plan has specific EFC ceilings which provide assistance on a high to low need spectrum in the form of increased gift aid award percentages to low and middle-income families. This approach ensures that more aid is directed to these family groups.

Enhanced Technology

During the 2017-18 year, UMW's Office of Financial Aid implemented a new paperless system, Dynamic Forms, in which many of our paper forms were transitioned to online forms. This aligned with the office's goal to transition to a paperless office. We find that many first-time students and families are overwhelmed with the financial aid process. This implementation is a part of an ongoing larger effort to ensure that the student financial aid experience is as easy and seamless as possible.

Expanded Outreach in 2017-2018

UMW's Office of Financial Aid has expanded its outreach efforts by visiting more high schools throughout Virginia. This includes hosting Financial Aid nights and FAFSA workshops in Norfolk, the Northern Neck, and in Spotsylvania, Stafford, and Fredericksburg. These efforts will be further expanded in the 2018-19 year.

Changes to Perkins:

In 2017- 2018, UMW's Office of Financial Aid prepared for announced changes to the Perkins Loan Program. The 2018-19 academic year will be the first year where no Perkins loans can be offered to either new or continuing student borrowers. Previous borrowers were notified late last year so they would have adequate time to find alternative funding sources for 2018-2019. Our population of Perkins students is relatively small (around 40 students) and no student has indicated that this will be a hindrance in their ability to continue. This is no guarantee that Perkins won't be renewed at some point in the future, so we will continue to monitor any news from the Federal government on the program.

Success of Our Approach

UMW's approach to keeping costs low for students is best reflected in its low student loan default rate. Our cohort default rate is 2.9% compared to the national average of 11.5%

Retrieved from <https://www2.ed.gov/offices/OSFAP/defaultmanagement/cdr.html>

UMW continues to be committed to increasing graduation rates for our high need students, inspiring students to forego excess borrowing through financial literacy workshops and providing accessibility to post-secondary education for all income levels. As a state public institution, UMW strives to offer competitive institutional scholarships that help open doors to low and middle-income students and their families. Identifying resources for institutional aid has been a priority at UMW in recent years with funding increasing from \$5.5 million in 2016-17 to an initial budget in 2018-19 of \$7.5 million. *An additional allocation of \$500,000, is tentatively planned for 2019-20.*

References:

NASFAA Taskforce report—Assessing Tuition and Debt Free Higher Education. Published January 2017

*NASFAA Taskforce report— Examining “One grant, One Loan”
Published August 2016*

Evaluation of Previous Six-Year Plan (*No change from UMW's 2017 Six-Year Plan submission.*)

Increase T&R Faculty Salaries

The 2016 General Assembly adopted a 3% salary increase for T & R faculty contingent upon the state achieving specific revenue benchmarks. State funding for the salary increase was subsequently withdrawn due to a shortfall in state revenues. UMW, using matching funds set aside for the state increase and reallocated funds, provided a 2.5% increase to all full-time T & R faculty in December 2016. Additionally, UMW increased T & R faculty salaries in two other ways. First, the increments for promotion to the rank of associate professor and professor, which had not been increased since the mid-1990s, were increased. Secondly, funds were reallocated to begin making progress in bringing UMW salaries up to the market mid-points as determined by a faculty salary study the University commissioned. Close to half the faculty received either a promotion increase or a market adjustment.

In FY 17, UMW reallocated \$195,000 in budget to begin to address identified salary gaps and salary compression. The allocation of salary increases was strategically targeted to close the most severe gaps and compressions, and therefore some faculty received a higher increase, some a lower increase, and some faculty no increase at all. After the planned salary actions in 2017-18, the funding gap to benchmark is estimated to be \$432,000, compared to the initial study finding of a salary to benchmark funding gap of \$1.2 million. At July 1, 2017, 122 full-time teaching faculty out of a total of 234 will have reached their salary benchmark.

Increase Classified Staff Salaries

The 2016 General Assembly adopted a 3% salary increase for classified staff contingent upon the state achieving specific revenue benchmarks. State funding for the salary increase was subsequently withdrawn due to a shortfall in state revenues. UMW, using matching funds set aside for the state increase and other one-time funds, provided a \$1,000 bonus to all full-time classified staff in December 2016 as a stop-gap measure.

For 2017-18, full-time classified staff will receive a 3% permanent increase effective July 10, 2017, as adopted by the 2017 General Assembly. Further, UMW has engaged a private research firm to undertake a compensation study of classified staff positions that will be used as the basis for potential additional salary actions in the 2018-20 biennium.

Increase Administrative Faculty Salaries

The 2016 General Assembly adopted a 3% salary increase for administrative faculty contingent upon the state achieving specific revenue benchmarks. State funding for the salary increase was subsequently withdrawn due to a shortfall in state revenues. UMW, using matching funds set aside for the state increase and other one-time funds, provided a \$1,000 bonus to all full-time administrative faculty in December 2016 as a stop-gap measure.

For 2017-18, the 2017 General Assembly adopted a 2% increase for administrative faculty at UMW. In its 2017-18 operating budget, UMW allocated funds to support an additional 1% increase in 2017-18 in order to be consistent with compensation actions taken for classified staff.

Establish Sexual Assault Prevention and Education Program

A full-time Title IX investigator and a full-time Title IX Coordinator were hired in 2017. Among the programs already implemented are: (1) mandatory training for all faculty and staff on sexual assault/ interpersonal violence, support and resources available, and reporting obligations; (2) required training for new students at orientation, including bystander training to prevent sexual violence/interpersonal violence; (3) the creation of a sexual assault and prevention peer mentor program; and (4) development of educational materials to promote prevention, education, reporting and provide on and off campus resources and support. Additionally, UMW applied for, and received, a \$299,926 grant from the Office on Violence Against Women to help victims of sexual assault, domestic violence and stalking. UMW was among just 45 institutions of higher education nationwide — one of only two in Virginia – to receive such a grant. The funding enables UMW to create a coordinated community response team made up of UMW staff, student groups, and local community partners such as the Fredericksburg Police Department and Empowerhouse – formerly the Rappahannock Council Against Sexual Assault. The grant also enables an expansion of victim services and prevention strategies and an enhancement of training efforts.

Establish and Promote Academic Areas of Distinction

UMW has implemented several strategies to capitalize on its proximity to the Richmond, VA and Washington, DC areas and the study and career opportunities for provided by its geographic location. In 2015/16, UMW concluded an agreement with The George Washington University medical school for conditional acceptance to the medical school during the student's second year at UMW. Although this is a relatively new agreement, one UMW student has already been accepted into GWU's medical school. This early acceptance program provides UMW students with an opportunity to gain a leg up on the competitive medical school application process. In 2017, UMW completed an agreement with the George Mason University Antonin Scalia Law School for an accelerated dual degree arrangement allowing students to earn a baccalaureate degree through UMW and the Juris Doctor from George Mason University in six years rather than the usual seven. Students admitted would receive the baccalaureate degree from UMW immediately upon successful completion of the first year of the law school program, and would receive the Juris Doctor (JD) from Mason's Scalia Law School immediately upon completion of those requirements. Also, early planning is underway to assess the feasibility of developing a "domestic study away program" comprised of a group of courses that might be offered in DC (rather than on campus), thereby enabling students to hear guest presentations from a variety of DC professionals in addition to subject matter taught by the assigned UMW faculty member. Finally, and because many of the unpaid internships available to UMW students occur in the Richmond and Washington, DC regions, the College of Arts and Sciences has begun a program to provide funding support for eligible students participating in a significant *unpaid* internship experience in the summer. Internship grants are competitively awarded through a selection process administered by the office of the Dean of Arts and Sciences. These awards, at \$2,000 each, are supported by donations from the College of Arts and Sciences Advisory Board.

Technology Enhancements

In its 2017-18 budget, UMW will make initial investments in establishing a PC replacement pool and to begin a more focused effort to support IT cloud migration. The relatively small allocations in the 2017-18 budget are seen as the first step in a multi-year funding process that will extend through the 2018-20 biennium.

O&M for New Facilities

In December 2015, UMW completed renovations and new additions to Woodard and Mercer Halls, the new homes of the College of Business and Department of Psychology, respectively. Additional costs for operation and maintenance were addressed through reallocations and cost savings.

Increase Number of Full-Time T&R Faculty

Because of the higher priority placed on increasing T & R faculty salaries, UMW did not create any additional T & R faculty positions.

Increase Number of Part-Time Faculty

Rather than hiring additional part-time faculty, UMW placed a priority on addressing the adequacy of part-time faculty salaries. The adjunct pay scale UMW follows, which had not been increased since 2012, was increased. Additionally, Deans are now authorized to make part-time salary offers in certain highly-competitive fields (such as Nursing) at rates higher than the top end of the established adjunct pay scale. Any such offers require approval of the Provost. This flexibility enhances recruitment of the highest quality part-time faculty.

Expand Efforts to Optimize Student Success

In fall 2015, UMW moved to a tripartite first-year advising model in which first-year students are advised by their first-year seminar instructor who is supported by a professional advisor in the Office of Academic Services and a peer mentor who are assigned to each seminar. Also, UMW procured and implemented a student-facing mobile application for fall 2017 that will enhance the University's capacity to communicate directly with students while guiding them through critical pathways necessary for completion and connecting them with essential resources necessary for success. We also procured and implemented an advising and early alert system for fall 2017 that will enhance the University's ability to identify, respond to, and manage cases involving students who appear to be having difficulty. In addition, these tools will permit university staff to conduct advising campaigns targeted at specific populations of students who are in need of a specific intervention or action. The summer bridge program, which is focused on working with an at-risk student population in the summer before they begin their freshman year at UMW, has doubled in size and has incorporated new strategies designed to promote academic success skills for these students. Evidence indicates that students completing this pre-matriculation program have increased retention and program completion results. Beginning in spring 2017, UMW introduced a mandatory workshop for all students on probation that is driven by the latest research on student success which demonstrates that mindset and non-cognitive factors have an out-sized impact on student success. Finally, over the last two years, UMW has significantly enhanced its capacity to support transfer students through regular orientation programs, professional advisement, a transition semester experience, published two-year

completion plans, committed to enhanced transfer counseling at local community college campuses, *created a Director of Transfer Advising position, and established Transfer Pathway agreements with Northern Virginia Community College.*

Enhance the Career and Professional Development Center

The Center for Career and Professional Development was established in the new University Center at the heart of the UMW campus in fall 2015 in order to emphasize the college-to-career imperative. In the last two years, the Center has undertaken several initiatives and programs in support of post-graduation success. A number of digital tools for personal, major and career exploration tools have been made available to all students. A career coaching program, designed to support first-year students in developing a four-year career plan, was inaugurated. A new online job and internship database also was implemented. Finally, UMW radically overhauled the approach it had been using to survey graduates about their career progression by developing a comprehensive “graduate exit survey” and “first destination survey” six months after graduation. These approaches will result in better information about the career plans and results of our students, which will help us to shape career and professional development activities to better meet the needs of our students.

Increase Support for the BSN Degree Completion Program

The Commission on Collegiate Nursing Education (CCNE) accredited UMW’s Bachelor of Science in Nursing program and has retroactively extended that accreditation to cover the program from its inception (fall 2014). Additional budget support was provided by the Office of the Provost to assist in meeting the necessary accreditation costs.

Continue Development of the First-Year Experience Program (UMW’s QEP)

UMW’s ambitious curricular plan for first-year students has implemented a more clearly defined set of integrated learning outcomes in the areas of information literacy, writing, and oral communication that will shape the development of this program. All of the online learning modules that will support instruction in the student learning areas have been developed. Additional faculty development initiatives are being planned to explain to faculty how they might employ the modules successfully in their courses. The rigorous assessment methodologies have been developed and are now being deployed to evaluate the extent to which student learning outcomes are being achieved and to gather data on the effectiveness of various programmatic elements. Beginning in fall 2015, UMW committed to providing a first-year seminar opportunity for all first-year students during their fall semester based upon data which showed that first year seminars taken in the first semester produce a GPA and retention benefit for students. Additional support is needed to diversify the academic disciplines that are contributing to the program by offering first-year seminar courses. As a result of the continued development of the first-year experience program, students will have a stronger foundation upon which to develop the skills necessary to be valued contributors to the 21st century job market.

Increase Academic Support for Adult and Continuing Education Students

In order to provide increased service and support to “non-traditional” students, UMW has refocused its efforts to better serve the region’s adult and continuing education students. A new Executive Director of Continuing and Professional Studies, with over twenty years of experience

in the field, was hired in spring 2017. She will be responsible for expanding the University's credit and non-credit programs for adults, including the creation new certificate programs and other professional development opportunities in demand by the region's adult and continuing education students. UMW continues to review options for developing the course schedule flexibility and convenience that will be appealing to working adult students (such as evening, weekend, on-line, hybrid, low-residency, 8-week semester delivery formats). These efforts were substantially enhanced by a \$250,000 appropriation awarded by the 2017 General Assembly to UMW as part of the 2017-18 budget.

Expand Summer Session Offerings

The 2016 summer session reversed a five-year trend that had seen UMW summer session enrollments decline by roughly 10% per year. Beginning in summer 2015, UMW embarked on a small but vigorous program to increase the number of online summer courses. From summer 2015 to 2017, the number of online courses offered as a part of the summer session increased from 21% of the summer session offerings to 31%. Summer enrollment in 2016 increased by 3.4% over the prior year. UMW also received a no-cost extension from the National Science Foundation (NSF) to continue a grant program that promotes STEM Talent Expansion through Research, Engagement, Preparation, and Scholarships. One facet of the plan brings high school students to campus in the summer to work on science research projects with UMW faculty and student mentors. Finally, UMW was awarded a new NSF that will expand the number of academically talented low income students who enter into STEM fields. Selected students will receive scholarships and will spend five weeks on campus prior to their first fall semester at UMW working on research projects in STEM fields. They will be mentored by faculty and upper-class STEM majors. This innovative project incorporates an early matriculation, intensive summer research experience, combined with peer-assisted study sessions, to increase the new student's self-efficacy and self-identity as a scientist, which will increase persistence through first-year gateway science courses.

Expand Graduate Programs in the College of Arts and Sciences

A new full-time faculty member with expertise in geospatial analysis joined the faculty in fall 2016 and is contributing to the teaching of the Master of Science in Geospatial Analysis degree program. The MSGA program is working to offer an expanded national advertising campaign to promote the program. Because almost 15% of the geospatial skills jobs advertised nationally are in the northern Virginia area, expanding the national presence of this program has the potential to attract more out of state students who will earn a degree and then relocate to Virginia in the growing geospatial employment sector.

Also, work is under way to develop a proposal for a Master of Science in Data Science degree. The anticipated start date is fall 2019. This is a collaborative program between the Departments of Computer Science and Mathematics, and the College of Business. This degree proposal targets a sector where Virginia and the United States are in need of well-educated graduates with the skills and knowledge needed to work with and analyze "big data." A recent 2016 report foresees a shortage of 250,000 data scientists in the near future, even taking into account a projected 7% annual increase in graduates from new Data Science academic programs.

UNIVERSITY OF MARY WASHINGTON
2018 Six-Year Plan

UMW also developed a proposal for a Master of Science in Nursing (MSN) degree program, which would provide the region with well-educated Family Nurse Practitioners (FNP). Mary Washington Healthcare (MWHC, the local hospital not affiliated with UMW) approached the University in 2016 and sought collaboration in building the program. After receiving word that SCHEV staff had elected not to recommend approval of this program to the State Council, UMW agreed to withdraw the program proposal.

Building on existing strong five-year models, going forward, UMW will explore those fifth-year programs in fields in demand that lead from our undergraduate majors into graduate degrees.

Tuition Rate Increases *(Updated)*

Note: *UMW's 2018-19 tuition and E&G fees increased by 4.5%, which is the same rate increase reflected in the 2017 six-year plan. Further, UMW's rate increase for its non-E&G fee was 4.0%, which is less than the 5.5% reflected in the 2017 six-year plan.*

The University of Mary Washington is frequently cited as a “best buy” by national publications such as the *Fiske Guide to Colleges, 2017*, and is lower in cost than one-half of the Virginia public universities. Further, UMW recently ranked #1 in Virginia by Student Loan Report in the first National Student Loan Repayment Success survey. This survey looked at average student loan debt per borrower and early career pay. Nationally, UMW ranked 44th.

For purposes of the 2018 six-year plan, UMW is estimating a tuition rate increase of 4.5% in 2019-20. This increase is required to make progress in the strategic academic initiatives identified in the six-year plan. These initiatives include efforts to enhance career opportunities for our students, increase academic success of both traditional and adult students, expand diversity and inclusiveness of students, faculty and staff, and address critical compensation needs of the university's faculty and staff.

UMW expects to remain a “best buy” and be lower in cost than one-half of the public universities in Virginia through the 2018-20 biennium.

Contributions to Economic Development

UMW's Center for Economic Development offers eight high-impact programs designed to meet the needs of local families, community partners, and businesses. These include the EagleWorks Business Incubation Center, the UMW StartUp Accelerator Program, StartUpUMW, the Small Business Development Center, the Government Contracting Assistance Center, Regional Initiatives, the Innovation Roundtable, and the Veterans Business Advisory Council.

- EagleWorks Business Incubation Center: Provides business development services to local startup and early-stage companies looking to grow their enterprises. Incubation programming supports entrepreneurs through access to professional networks, office facilities, consulting services, peer engagement opportunities, and other business resources. It is an immersion program that helps improve business productivity by working in a professional full-service office ecosystem. Clients can share ideas with other business owners in the incubator, meet with clients in the conference room and take advantage of the professional networks associated with the UMW Center for Economic Development. They receive professional advice from business consultants, entrepreneur mentors, and attend training courses, workshops, peer to peer roundtables. EagleWorks meets the unique start-up or growth needs of each business through flexible client plans. In FY2018 the EagleWorks BIC had 9 residential clients and 11 virtual clients. There were 3 graduations at the end of the year including a company acquisition valued at \$3.2 million and another firm that received an award to manage real estate transactions for the Virginia 529 College Savings and Investment Plan.
- The UMW StartUp Accelerator program is on track for launch in fall 2018. The UMW StartUP Accelerator is an action-oriented and results-driven entrepreneurial experience for participants. Participants will learn material from diverse subject matter experts who practice entrepreneurship in their everyday commercial pursuits. The target audience will be comprised of targeted clients with potential for commercializing a service or product or who want to learn the process. The Accelerator is comprised of (4) sessions of (4) hour intense sessions that will support entrepreneurs define: (1) Ideation, (2) Customer Identification and Customer Experience (3) Product/Service Value Development (4) Business Model Development; (5) Forecasting and Capital Planning; and (6) Brand Messaging. Each session will include weekly progress assessments, value-added advising, and preparation assignments. The Center for Economic Development facilitated 66 new startup companies in Virginia in FY18. The accelerator is designed to enhance the development of companies and increase the potential in the ecosystem.
- StartUpUMW: The UMW Center for Economic Development offers an interdisciplinary student entrepreneur education program, StartUpUMW, which teaches essential skills and effective strategies for starting and running a business. Through this semester-long program designed to engage and inspire, students will learn by doing from successful business owners and local professionals. Students gain valuable skills and knowledge customized to fit career goals through:

- opportunities to learn from experienced, successful entrepreneurs and professionals;
- greater understanding of what it means to be entrepreneurial;
- access to research databases, business consultants and office space to ideate and commercialize;
- tools to write a business plan which can be used to seek funding for a business venture;
- feedback and guidance from the UMW Center for Economic Development's team of advisors;
- opportunities to earn academic scholarship money; and,
- fulfillment of the Experiential Learning credit or Internship Experience or Independent Study.

In FY18 there were 22 UMW students in the program. Eight (8) students commercialized their business concept within the year.

StartUpUMW also serves secondary schools in the Northern Neck and Middle Peninsula Planning District Regions. In FY18 there were 5 cohorts serving Washington and Lee High School, Rappahannock High School, Northumberland High School and Essex High School. 101 students were taught entrepreneurial approaches to problem solving, customer experience, market identification, business modeling, and business creation and operation.

StartUpUMW will collaborate with Rappahannock Community College for a cohort to serve their students in the fall of 2018. The collaboration will include 8 sessions across 4 weeks in the Business 101 course. It is expected that another version will become a stand-alone 12 week course on entrepreneurship.

- UMW Small Business Development Centers: The University of Mary Washington Small Business Development Center (UMWSBDC) is a resource center that provides assistance to the small business community via management training, industrial and demographic research, and confidential one-on-one consulting with a focus on capital access and management planning. A partnership with the US Small Business Administration and the Virginia Small Business Centers Network, the University of Mary Washington operates an urban office in Fredericksburg that serves Planning District 16 and the greater region and a rural office in Warsaw that serves the Northern Neck and Middle Peninsula. The joint UMW Small Business Development Center offices assisted 362 regional companies, influenced the creation of 131 new jobs and facilitated \$3,529,398 in new capital investment. UMW SBDC operations provided 89 business training classes and educated 803 attendees.
- The UMWSBDC is now partnering with Virginia ICAP. This partnership will combine efforts by the University of Mary Washington and George Mason University to grow a stronger ecosystem for technology development and commercialization. VICAP is an

Innovation and Commercialization Assistance Program at the Virginia Small Business Development Center Network provides a program based on the National Science Foundation's I-Corps™ program for Lean Startups. ICAP helps inventors and innovation entrepreneurs take the right first steps in bringing new technologies and innovations to market. The program includes training and counseling services offered through ICAP instructors and local SBDC advisors. ICAP helps startups identify potential customers and develop successful business models based on that knowledge. The UMW-SBDC will launch the first cohort in October 2018. This program will enhance the capacity for commercializing tech-transfer in the Fredericksburg region. In conjunction with the UMW StartUp Accelerator and the Innovation Roundtable, regional entrepreneurs will be better positioned for business sustainability and growth.

- UMW Government Contracting Assistance Center: The GCAC is a program of the Small Business Development Center and collaborates with the US Small Business Administration, the Procurement Technical Assistance Program, and the Virginia Department of Small Business and Supplier Diversity. It facilitates one-on-one personalized government contracting assistance consultations with advisors who can coach across a number of topics in both the Federal and Virginia contracting disciplines. The GCAC also provides a FastTRAC program that prioritizes assistance for the preparation and attainment of valuable certifications that support contract fulfillment. These include registrations for Small-Woman-Minority Owned Business (SWaM) and the Federal System for Awards Management (SAM). Others include Historically Underutilized Business Zone certification, the 8(a) program, Small, Woman-Owned, Veteran-Owned, Service Disabled Veteran, Small Disadvantaged, and other certifications. FY results include:
 - 39 State Contracting consultations
 - 36 Federal Contracting consultations
 - 15 System for Award Management registrations
 - 37 SWaM certifications
 - 35 eVA registrations
 - 4 Woman Owned Small Business self-certifications
 - 4 Service Disabled Veteran Owned Small Business verifications
 - 7 8(a) certifications
 - 8 Fast Track applications

- Regional Initiatives: The UMW Center for Economic Development supports collaborative convening, experiential learning, and information transfer through this capability. Projects in FY18 include the following.
 - Corporate restructuring of the Virginia Business Incubation Association (VBIA). VBIA is an education and networking association for professionals who support entrepreneurship, small business development, and the advancement of the business incubation process as an economic growth catalyst throughout the Commonwealth.

- A collaboration with the UMW MBA students, the Center for Economic Development and the Stafford Regional Airport Authority that yielded a new 5-year Strategic Discovery and Plan.
 - A collaboration involving businesses, organizations and State Agencies to engage UMW MBA students with project management plan opportunities. In FY18 there were 10 project plans generated by 60 students.
 - 2018 Edition of the UMW Business Resource Guide was completed. It is a continuous and “living” compilation of business support information that organizations share on the web. It systematizes internet resources in a hierarchical taxonomy for quick access.
 - Fredericksburg Main Street Inc. Peak Sales study is in progress. The Peak Sales resource is industry segment and market specific. The results of the study will help business owners in the FMSI district better understand cyclical effects on their sales. The Peak Sales results will yield data-supported financial forecasting and strategic and tactical decision making.
 - Fredericksburg Main Street Inc. Mystery Shopper program is in progress. The Mystery Shopper program will provide a comprehensive assessment of each businesses customer experience. The assessment will yield improvements in workforce management and customer attributes that produce higher value and potential sales.
 - The 2018 edition of the UMW Directory of Virginia Non-Traditional Business Investment, Funding, and Financing Resources is in progress. It shares information ranging across micro-lenders, Community Development Financial Institutions, Angel Networks, Venture Funds, Crowd Funding, and other resources to assist business owners with determining their funding opportunities.
 - The Virginia Business Incubation Association mapping tool is a continuously updating feature managed by the UMW Center for Economic Development and available at www.VBIA.org. It is an interactive map that assists business owners, advising professionals and economic development practitioners with a point and click approach to finding the right business incubation resource in Virginia for their needs.
- Innovation Roundtable: The UMW Center for Economic Development hosts an Innovation Roundtable which provides a peer to peer learning exchange in a confidential and moderated environment. This program allows entrepreneurs to share problems and solutions with the goal of validating design and markets, identifying capital opportunities, potential teaming, and ultimately the more rapid commercialization of innovation. Six companies benefitted from the first cohort in FY18.
 - Veterans Business Advisory Council: The Veterans Business Advisory Council is an extension of the University of Mary Washington Center for Economic Development which advocates, collaborates in outreach, and partners on identifying new initiatives that advance and support veteran entrepreneurship, business success, and veterans missions that align with the University of Mary Washington. This council supports on-going

Veteran Business peer to peer roundtables (1 cohort for 6 months), the Veterans Endowment to support scholarship, the Regional Drug Treatment Court (2 council companies participating), and advocating for Veteran-Owned Business (2 council companies provided marketing and innovation mentorship to 4 SBDC clients). The council and CED staff selected the Veteran Owned Business Entrepreneur of the Year recipient (Sean Ricks, Rick's Roasters, a 2017 UMW-CED recipient and a 2018 VSBDC State Finalist). In addition, the Council supports student opportunities in Veteran enterprises (1 council member serves as a site representative for StartUP UMW students; 20 students benefited and 1 council member presented to 2 sessions of the MKTG422 class benefitting 30 students.)

Business management/consulting assistance

The University of Mary Washington Center for Economic Development collaborates with business, government, education, and private parties to promote personal, professional and economic growth by advancing knowledge through entrepreneurship, small business development, innovation and competitiveness, research and analysis, and outreach and engagement. It exists to provide the following:

- Small companies with free consulting, affordable access to management education and affordable access to business research;
- Access to capital through preparation and networking with finance professionals.
- UMW students with an interdisciplinary approach to entrepreneurial opportunity;
- Industry, government, and community based organizations with research and analysis and information transfer;
- Start-up and early stage businesses with a managed incubation growth-focused ecosystem;
- Virginia business incubation professionals with professional development and peer convening;
- Veterans with peer convening, management education, and advocacy initiatives.

Capital Outlay Priorities with a Significant Impact on the Operating Budget *(Updated)*

The University of Mary Washington has four capital projects in its six-year capital outlay plan that could potentially have a significant impact on the operating budget.

The first project is the **Jepson Science Center addition**. The project calls for renovation of the existing building and a new addition estimated at 40,000 GSF and is currently under construction. New E&G operating costs are estimated at \$250,000 annually. These costs include utilities, housekeeping services and a new full-time lab assistant. Student tuition and fees will need to increase to cover that portion of costs not supported by state general funds.

The second project planned for 2018-20 is the renovation of **Seacobeck Hall**. Seacobeck Hall formerly housed the main dining facilities for the university. With the completion of the University Center in July 2015, dining and the related operating budget moved from Seacobeck Hall to the University Center. Seacobeck Hall will be renovated for academic use and the space will be shifted from auxiliary to Education and General Programs. As such, a new operating budget will need to be established for Seacobeck Hall, which is approximately 43,000 square feet in size. The annual operating budget is estimated at \$175,000 and includes utilities, housekeeping, and security services. To the extent that general funds are not provided for operation and maintenance, student tuition and fees will need to be increased to cover these costs.

The university has undertaken a multi-year approach in the renovation of **residence halls** campus-wide. One residence hall (Willard), is currently under major renovation and will reopen for fall 2019. A second residence hall (Alvey) will be closed for renovation in 2018-19 and will reopen for fall 2020. Planning and design for the renovation of a third residence hall (Virginia) will begin in 2018-19 and potentially undergo renovation during the 2020-21 academic year. Planning and assessment of other residence hall will be addressed over a multi-biennium time frame and will include debt planning, student charges, and enrollment.

The fourth project for which the university will be seeking state general fund support is a new **performing arts center and renovation of its fine arts complex**. This project will be the university's top capital priority moving forward and will support a key component of the university's liberal arts mission. In addition to the project funding, additional support will be required for facility maintenance and operating costs.

Restructuring *(No change from UMW's 2017 six-year plan.)*

The University of Mary Washington was approved for Level II operational authority in the functional areas of Information Technology and Procurement on October 29, 2013, which was renewed on November 1, 2016.

At this time, the University does not have any plans to seek additional operational authority either through legislation or renegotiated management agreements. However, UMW is open to continuing discussions on this matter as additional enhancements to higher education restructuring are considered by the Commonwealth.

Six-Year Plans - Part I (2018): 2018-20 through 2022-24

Due: July 12, 2018

Institution:

Institution UNITID:

Individual responsible for plan

Name:

Email address:

Telephone number:

Six-Year Plans - Part I (2018): 2018-20 through 2022-24
University of Mary Washington

ACADEMIC AND FINANCIAL PLAN

Instructions: In the column entitled "Academic and Support Service Strategies for Six-Year Period (2018-2024)," please provide titles to identify strategies (for the three biennia of this six-year period) associated with goals in the Virginia Plan. *Please use this title to identify a more detailed description of the strategy in the separate Word document (Part II - Narrative).*

Priority Ranking	ACADEMIC AND SUPPORT SERVICE STRATEGIES FOR SIX-YEAR PERIOD (2018-2024)											Narrative	Narrative	
	Biennium 2018-2020 (7/1/18-6/30/20)										Information for 2018-19 and/or for Biennium 2020-2022 (7/1/20-6/30/22)			Information for 2019-20 and/or for Biennium 2022-2024 (7/1/22-6/30/24)
	Strategies (Short Title)	VP Goal	Cost: Incremental, Savings, Reallocation											
			2018-2019		2019-2020		2018-2019 (revised)		2019-2020 (revised)					
Total Amount			Amount From Tuition Revenue	Total Amount	Amount From Tuition Revenue	Total Amount	Amount From Tuition Revenue	Total Amount	Amount From Tuition Revenue					
1	Enhance the Career and Professional Development Center	2	Incremental:	\$357,000	\$357,000	\$357,000	\$357,000	\$150,000	\$150,000	\$525,000	\$150,000	Program fully-funded in 2019-20 and includes support for a Director of the Center for Career and Professional Development, two Career Coaches and operating support.	Evaluate program effectiveness and modify as appropriate.	
			Savings:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			
			Reallocation:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			
2	Increase Academic Support for Adult and Continuing Education Studies	1, 2, 3, 4	Incremental:	\$329,000	\$329,000	\$329,000	\$329,000	\$369,984	\$0	\$369,984	\$0	Program fully-funded in 2018-19. Funding will be used to provide service and support to non-traditional students and professional development needs of the regional workforce.	Evaluate program effectiveness and modify as appropriate.	
			Savings:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			
			Reallocation:	\$0	\$0	\$0	\$0	\$119,984	\$0	\$119,984	\$0			
3	Selectively Expand Graduate Programs	1, 2, 4	Incremental:	\$50,000	\$50,000	\$50,000	\$50,000	\$0	\$0	\$50,000	\$0	Existing resources sufficient to identify potential fifth-year graduate programs in fields in demand that lead from UMW's undergraduate majors.	Allocate new resources to develop fifth-year graduate programs that lead from existing undergraduate majors at UMW.	
			Savings:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			
			Reallocation:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			
4	Expand and Enhance the Use of Technology	2, 3, 4	Incremental:	\$579,000	\$299,100	\$1,724,000	\$1,355,100	\$319,000	\$200,000	\$859,000	\$510,000	In 2018-19, funding will be used for one-time costs and to begin a multi-year effort toward full-funding in order to minimize the impact on tuition in a given year.	Full funding of this initiative is anticipated during the 2020-22 biennium. Moving forward, additional technological opportunities will be evaluated as appropriate.	
			Savings:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			
			Reallocation:	\$279,900	\$0	\$368,900	\$0	\$119,000	\$0	\$119,000	\$0			
5	Expand Student Support Staff to Optimize Student Success	1, 2, 3, 4	Incremental:	\$80,000	\$0	\$153,000	\$73,000	\$150,000	\$150,000	\$230,000	\$230,000	Funding in 2018-19 was used to hire an Assistive Technology Specialist in the Office of Disability Resources.	In 2019-20, funding is planned to support a new Student Success Coordinator to ensure the success of underrepresented and at-risk students.	
			Savings:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			
			Reallocation:	\$80,000	\$0	\$80,000	\$0	\$0	\$0	\$0	\$0			
6	Increase the Diversity and Inclusiveness of UMW's Student Population, Faculty and Staff	1, 2, 4	Incremental:	\$205,000	\$0	\$205,000	\$0	\$215,000	\$180,000	\$315,000	\$280,000	Funding in 2018-19 includes aid for disadvantaged and underrepresented students and the establishment of an Office for Equity and Access.	In 2019-20, additional funds are targeted to recruit and enroll disadvantaged and underrepresented students.	
			Savings:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			
			Reallocation:	\$205,000	\$0	\$205,000	\$0	\$35,000	\$0	\$35,000	\$0			
7	Integrate Digital Environment and Academic Programs	1, 2, 3, 4	Incremental:	\$50,000	\$50,000	\$200,000	\$200,000	\$0	\$117,000	\$200,000	\$83,000	Begin multi-year effort to integrate the digital environment across all disciplines and appropriate programs.	Additional funding provided in 2019-20 through the 2022-24 biennium. Full-funding is estimated at \$600,000.	
			Savings:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			
			Reallocation:	\$0	\$0	\$0	\$0	\$117,000	\$0	\$117,000	\$0			
8	Establish and Promote Academic Areas of Distinction	2, 4	Incremental:	\$100,000	\$100,000	\$250,000	\$250,000	\$0	\$0	\$100,000	\$100,000	For 2018-19, UMW will continue to identify and plan areas of distinction for enhanced promotion and funding.	In 2019-20, additional funding will be allocated to UMW's distinctive programming in undergraduate research, service learning and fine arts programming.	
			Savings:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			
			Reallocation:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			
9	Continue Development of First-Year Experience Program	2, 3, 4	Incremental:	\$50,000	\$0	\$50,000	\$0	\$0	\$0	\$50,000	\$50,000	Funding in 2019-20 will support deployment of student mobile technology beginning with orientation and throughout the first year.	Evaluate program effectiveness and modify as appropriate.	
			Savings:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			
			Reallocation:	\$50,000	\$0	\$50,000	\$0	\$0	\$0	\$0	\$0			
15	Enhance Space Utilization Across All UMW Facilities and Campuses	3	Incremental:	\$100,000	\$0	\$200,000	\$100,000	\$96,500	\$0	\$19,000	\$19,000	For 2018-19, funding has been identified to purchase and implement an automated scheduling system.	For 2019-20, permanent funding will be allocated to support ongoing licensing and maintenance costs for the scheduling system.	
			Savings:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			
			Reallocation:	\$100,000	\$0	\$100,000	\$0	\$96,500	\$0	\$0	\$0			
Total 2018-2020 Costs														
Incremental (included in Financial Plan line 61)				\$1,900,000	\$1,185,100	\$3,518,000	\$2,714,100	\$1,300,484	\$797,000	\$2,717,984	\$1,422,000			
Savings				\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			
Reallocation				\$714,900	\$0	\$803,900	\$0	\$487,484	\$0	\$390,984	\$0			

Six-Year Plans - Part I (2018): 2018-20 through 2022-24
University of Mary Washington

ACADEMIC AND FINANCIAL PLAN

Six-Year Financial Plan for Educational and General Programs, Incremental Operating Budget Need
 2018-2020 Biennium
 (Assuming No Additional General Fund)

Items	2018-2019		2019-2020		2018-2019 (revised)		2019-2020 (revised)	
	Total Amount	Amount From Tuition Revenue	Total Amount	Amount From Tuition Revenue	Total Amount	Amount From Tuition Revenue	Total Amount	Amount From Tuition Revenue
Total Incremental Cost from Academic Plan¹	\$1,900,000	\$1,185,100	\$3,518,000	\$2,714,100	\$1,300,484	\$797,000	\$2,717,984	\$1,422,000
10 Increase T&R Faculty Salary Amount (state authorized salary increase), put NGF share amount in the tuition column and NGF share+state funding in the total column							\$432,000	\$225,000
Increase T&R Faculty Salary Amount (additional NGF salary increase), put NGF amount in both tuition and total columns	\$190,000	\$190,000	\$382,000	\$382,000	\$200,000	\$200,000	\$400,000	\$400,000
T&R Faculty Salary Increase Rate (put state authorized salary increases in the total column, leave tuition column blank)							2.00%	
Additional NGF T&R Faculty Salary Increase Rate (put additional NGF salary increase rate in both tuition and total columns)	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%
12 Increase Admin. Faculty Salary Amount (state authorized salary increase), put NGF share amount in the tuition column and NGF share+state funding in the total column					\$0	\$0	\$216,000	\$112,000
Increase Admin. Faculty Salary Amount (additional NGF salary increase), put NGF amount in both tuition and total columns	\$105,000	\$105,000	\$212,000	\$212,000	\$32,000	\$32,000	\$64,000	\$64,000
Admin Faculty Salary Increase Rate (put state authorized salary increases in the total column, leave tuition column blank)							2.00%	
Additional NGF Admin. Faculty Salary Increase Rate (put additional NGF salary increase rate in both tuition and total columns)	1.00%	1.00%	1.00%	1.00%	0.30%	0.30%	0.30%	0.30%
Increase Classified Salary Amount (state authorized salary increase), put NGF share amount in the tuition column and NGF share+state funding in the total column							\$528,000	\$275,000
Increase Classified Salary Amount (additional NGF salary increase), put NGF amount in both tuition and total columns	\$125,000	\$125,000	\$252,000	\$252,000	\$165,000	\$165,000	\$330,000	\$330,000
11 Classified Salary Increase Rate (put state authorized salary increases in the total column, leave tuition column blank)							4.00%	
Additional NGF Classified Salary Increase Rate (put additional NGF salary increase rate in both tuition and total columns)	1.00%	1.00%	1.00%	1.00%	1.25%	1.25%	1.25%	1.25%
Increase University Staff Salary Amount (state authorized salary increase), put NGF share amount in the tuition column and NGF share+state funding in the total column	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Increase University Staff Salary Amount (additional NGF salary increase), put NGF amount in both tuition and total columns								
University Staff Salary Increase Rate (put state authorized salary increases in the total column, leave tuition column blank)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Additional NGF University Staff Salary Increase Rate (put additional NGF salary increase rate in both tuition and total columns)								
A 17 Increase Hourly Rate for Wage Employees	\$0	\$0	\$0	\$0	\$26,000	\$26,000	\$71,000	\$71,000
Wage Employee Increase Rate *	0.00%	0.00%	0.00%	0.00%	5.00%	5.00%	10.00%	10.00%
14 Increase Adjunct Faculty Pay Scale	\$25,000	\$25,000	\$50,000	\$50,000	\$0	\$0	\$25,000	\$25,000
13 Increase Number of Full-Time T&R Faculty ⁴ (\$)	\$270,000	\$270,000	\$270,000	\$270,000	\$0	\$0	\$288,550	\$0
Increase Number of Full-Time T&R Faculty ⁴ (FTE)	3	3	3	3	0	0	3	0
Increase Number of Full-Time Admin. Faculty ⁴ (\$)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Increase Number of Full-Time Admin. Faculty ⁴ (FTE)	0	0	0	0	0	0	0	0

Six-Year Plans - Part I (2018): 2018-20 through 2022-24
University of Mary Washington

ACADEMIC AND FINANCIAL PLAN

	Increase Number of Part-Time Faculty ⁴ (\$)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Increase Number of Part-Time Faculty ⁴ (FTE)	0	0	0	0	0	0	0	0
	Increase Number of Classified Staff ⁴ (\$)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Increase Number of Classified Staff ⁴ (FTE)	0	0	0	0	0	0	0	0
	Increase Number of University Staff ⁴ (\$)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Increase Number of University Staff ⁴ (FTE)	0	0	0	0	0	0	0	0
	Library Enhancement ⁴ (\$)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Library Enhancement ⁴ (FTE)	0	0	0	0	0	0	0	0
	Technology Enhancement ⁴ (\$)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Technology Enhancement ⁴ (FTE)	0	0	0	0	0	0	0	0
	O&M for New Facilities ⁴ (\$)	\$0	\$0	\$0	\$0	\$0	\$0	\$100,000	\$50,000
	O&M for New Facilities ⁴ (FTE)	0	0	0	0	0	0	0	0
16	Utility Cost Increase	\$175,000	\$175,000	\$360,000	\$360,000	\$100,000	\$100,000	\$205,000	\$205,000
	NGF share of state authorized salary increase/bonus	\$0	\$0	\$0	\$0	\$0	\$0	\$605,000	\$605,000
	Fringe/health insurance benefits increase	\$0	\$0	\$0	\$0	\$450,000	\$187,000	\$450,000	\$187,000
	VRS increase	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Additional In-State Student Financial Aid From Tuition Revenue	\$0	\$0	\$0	\$0	\$69,000	\$69,000	\$69,000	\$69,000
	Others (Specify, insert lines below)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Safety and Security Enhancement	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Total Additional Funding Need	\$2,790,000	\$2,075,100	\$5,044,000	\$4,240,100	\$2,342,484	\$1,576,000	\$6,501,534	\$4,040,000

Notes:

- (1) Please ensure that these items are not double counted if they are already included in the incremental cost of the academic plan.
- (2) If planned, enter the cost of any institution-wide increase.
- (3) Enter planned annual faculty salary increase rate. Any salary increase entered here will be counted when calculating the gap to reach the 60th percentile in the future.
- (4) Enter number of FTE change over the FY2018 level in appropriate columns.

* UMW has undertaken a multi-year effort to close market-based salary gaps identified in compensation studies for teaching faculty, administrative faculty, and classified staff. In a given year, only a portion of employees in each group (teaching faculty, administrative faculty, classified) will receive an adjustment. The amount of the increase will vary from employee to employee and many employees will receive no increase. In the chart above, the amount shown by the position type for the rate increase has been calculated based on only those employees receiving an increase. As such, the average increase for all employees, including those not receiving an increase, is considerably smaller than what is presented above.

Six-Year Plans - Part I (2018): 2018-20 through 2022-24

University of Mary Washington

Six-Year Financial Plan for Tuition and Fee Increases and Nongeneral Fund Revenue Estimates

Items	Revised																		
	2016-2017 (Estimated)			2017-2018 (Estimated)			2018-2019 (Planned)			2019-2020 (Planned)			2017-18 (Est.)	2018-2019 (Estimated)			2019-2020 (Planned)		
	Student Charge	Total Revenue	Student Charge	Rate Increase	Total Revenue	Student Charge	Rate Increase	Total Revenue	Student Charge	Rate Increase	Total Revenue	Total Revenue	Student Charge	Rate Increase	Total Revenue	Student Charge	Rate Increase	Total Revenue	
E&G Programs																			
Undergraduate, In-State	\$7,948	\$30,500,000	\$8,306	4.5%	\$31,785,000	\$8,680	4.5%	\$33,220,000	\$9,070	4.5%	\$34,700,000	\$31,933,000	\$8,678	4.5%	\$33,358,000	\$9,070	4.5%	\$34,847,000	
Undergraduate, Out-of-State	\$22,538	\$10,100,000	\$23,552	4.5%	\$10,475,000	\$24,612	4.5%	\$10,950,000	\$25,720	4.5%	\$11,450,000	\$10,500,000	\$24,612	4.5%	\$10,982,000	\$25,720	4.5%	\$11,474,000	
Graduate, In-State	\$7,650	\$2,550,000	\$7,974	4.2%	\$2,665,000	\$8,332	4.5%	\$2,780,000	\$8,708	4.5%	\$2,900,000	\$2,648,000	\$8,334	4.5%	\$2,766,000	\$8,710	4.5%	\$2,889,000	
Graduate, Out-of-State	\$16,524	\$310,000	\$17,262	4.5%	\$325,000	\$18,038	4.5%	\$335,000	\$18,850	4.5%	\$350,000	\$303,000	\$18,036	4.5%	\$317,000	\$18,848	4.5%	\$331,000	
Law, In-State	\$0	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0		
Law, Out-of-State	\$0	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0		
Medicine, In-State	\$0	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0		
Medicine, Out-of-State	\$0	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0		
Dentistry, In-State	\$0	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0		
Dentistry, Out-of-State	\$0	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0		
PharmD, In-State	\$0	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0		
PharmD, Out-of-State	\$0	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0		
Veterinary Medicine, In-State	\$0	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0		
Veterinary Medicine, Out-of-State	\$0	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0	\$0	%	\$0		
Other NGF		\$1,750,000			\$1,800,000			\$1,850,000			\$1,900,000	\$1,888,000			\$1,925,000			\$1,975,000	
Total E&G Revenue - Gross		\$45,210,000			\$47,050,000			\$49,135,000			\$51,300,000	\$47,272,000			\$49,348,000			\$51,516,000	
Total E&G Revenue - Net of Financial Aid		\$39,610,000			\$39,950,000			\$42,035,000			\$44,200,000	\$39,872,000			\$41,848,000			\$44,016,000	
E&G Revenue Used for Faculty Salary Increases		\$305,000			\$336,000			\$0			\$1,000	\$290,000			\$200,000			\$200,000	
Average T&R Faculty Salary Increase Rate		2.50%			3.00%			1.00%			1.00%	3.50%			1.70%			1.50%	
Auxiliary Program																			
Mandatory Non-E&G Fees																			
Undergraduate	\$3,622		\$3,822	5.5%		\$4,032	5.5%		\$4,254	5.5%			\$3,976	4.0%		\$4,134	4.0%		
Graduate	\$1,908		\$2,016	5.7%		\$2,126	5.5%		\$2,242	5.5%			\$2,088	3.6%		\$2,172	4.0%		
Law	\$0		\$0	%		\$0	%		\$0	%			\$0	%		\$0	%		
Medicine	\$0		\$0	%		\$0	%		\$0	%			\$0	%		\$0	%		
Dentistry	\$0		\$0	%		\$0	%		\$0	%			\$0	%		\$0	%		
PharmD	\$0		\$0	%		\$0	%		\$0	%			\$0	%		\$0	%		
Veterinary Medicine	\$0		\$0	%		\$0	%		\$0	%			\$0	%		\$0	%		
Total Auxiliary Revenue (ALL including room and board)		\$39,675,000			\$41,125,000			\$42,600,000			\$44,150,000	\$42,180,000			\$43,700,000			\$45,800,000	
Total Tuition and Fees																			
Undergraduate, In-State	\$11,570		\$12,128	4.8%		\$12,712	4.8%		\$13,324	4.8%		\$12,654	4.3%		\$13,204	4.3%			
Undergraduate, Out-of-State	\$26,160		\$27,374	4.6%		\$28,644	4.6%		\$29,974	4.6%		\$28,588	4.4%		\$29,854	4.4%			
Graduate, In-State	\$9,558		\$9,990	4.5%		\$10,458	4.7%		\$10,950	4.7%		\$10,422	4.3%		\$10,882	4.4%			
Graduate, Out-of-State	\$18,432		\$19,278	4.6%		\$20,164	4.6%		\$21,092	4.6%		\$20,124	4.4%		\$21,020	4.5%			
Law, In-State	\$0		\$0	%		\$0	%		\$0	%		\$0	%		\$0	%			
Law, Out-of-State	\$0		\$0	%		\$0	%		\$0	%		\$0	%		\$0	%			
Medicine, In-State	\$0		\$0	%		\$0	%		\$0	%		\$0	%		\$0	%			
Medicine, Out-of-State	\$0		\$0	%		\$0	%		\$0	%		\$0	%		\$0	%			
Dentistry, In-State	\$0		\$0	%		\$0	%		\$0	%		\$0	%		\$0	%			
Dentistry, Out-of-State	\$0		\$0	%		\$0	%		\$0	%		\$0	%		\$0	%			
PharmD, In-State	\$0		\$0	%		\$0	%		\$0	%		\$0	%		\$0	%			
PharmD, Out-of-State	\$0		\$0	%		\$0	%		\$0	%		\$0	%		\$0	%			
Veterinary Medicine, In-State	\$0		\$0	%		\$0	%		\$0	%		\$0	%		\$0	%			
Veterinary Medicine, Out-of-State	\$0		\$0	%		\$0	%		\$0	%		\$0	%		\$0	%			
Student Financial Aid (Program 108)		\$5,600,000			\$7,100,000			\$7,100,000			\$7,100,000	\$7,400,000			\$7,500,000			\$7,500,000	
Sponsored Programs (Program 110)		\$750,000			\$800,000			\$850,000			\$900,000	\$700,000			\$750,000			\$800,000	
Unique Military Activities		\$0			\$0			\$0			\$0	\$0			\$0			\$0	
Workforce Development		\$0			\$0			\$0			\$0	\$0			\$0			\$0	
Other (Specify)		\$0			\$0			\$0			\$0	\$0			\$0			\$0	

Six-Year Plans - Part I (2018): 2018-20 through 2022-24
University of Mary Washington

FINANCIAL AID PLAN

Note: If you do not have actual amounts for Tuition Revenue for Financial Aid by student category, please provide an estimate. If values are not distributed for Tuition Revenue for Financial Aid, a distribution may be calculated for your institution.

Allocation of Tuition Revenue Used for Student Financial Aid

***2016-17 (Actual) Please see footnote below**

T&F Used for Financial Aid	Gross Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid
Undergraduate, In-State	\$30,500,000	\$3,727,001	12.2%	\$3,727,001
Undergraduate, Out-of-State	\$10,100,000	\$1,725,786	17.1%	\$1,725,786
Graduate, In-State	\$2,550,000	\$75,154	2.9%	\$75,154
Graduate, Out-of-State	\$310,000	\$21,037	6.8%	\$21,037
First Professional, In-State	\$0	\$0	%	\$0
First Professional, Out-of-State	\$0	\$0	%	\$0
Total	\$43,460,000	\$5,548,978	12.8%	\$5,548,978
Total from Finance-T&F worksheet	\$45,210,000	\$5,600,000	12.4%	
In-State Sub-Total	\$33,050,000	\$3,802,155	11.5%	\$3,802,155

2017-18 (Planned)

T&F Used for Financial Aid	Gross Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid
Undergraduate, In-State	\$31,785,000	\$4,625,000	14.6%	\$4,625,000
Undergraduate, Out-of-State	\$10,475,000	\$2,415,000	23.1%	\$2,415,000
Graduate, In-State	\$2,665,000	\$58,200	2.2%	\$58,200
Graduate, Out-of-State	\$325,000	\$1,800	0.6%	\$1,800
First Professional, In-State	\$0	\$0	%	\$0
First Professional, Out-of-State	\$0	\$0	%	\$0
Total	\$45,250,000	\$7,100,000	15.7%	\$7,100,000
Total from Finance-T&F worksheet	\$47,050,000	\$7,100,000	15.1%	
In-State Sub-Total	\$34,450,000	\$4,683,200	13.6%	\$4,683,200
Additional In-State	\$1,400,000	\$881,045	62.9%	\$881,045

2018-19 (Planned)

T&F Used for Financial Aid	Gross Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid
Undergraduate, In-State	\$33,220,000	\$4,625,000	13.9%	\$4,625,000
Undergraduate, Out-of-State	\$10,950,000	\$2,415,000	22.1%	\$2,415,000
Graduate, In-State	\$2,780,000	\$58,200	2.1%	\$58,200
Graduate, Out-of-State	\$335,000	\$1,800	0.5%	\$1,800
First Professional, In-State	\$0	\$0	%	\$0
First Professional, Out-of-State	\$0	\$0	%	\$0
Total	\$47,285,000	\$7,100,000	15.0%	\$7,100,000
Total from Finance-T&F worksheet	\$49,135,000	\$7,100,000	14.4%	
In-State Sub-Total	\$36,000,000	\$4,683,200	13.0%	\$4,683,200
Additional In-State	\$1,550,000	\$0	%	\$0
Additional In-State from Financial Plan		\$0	%	

2019-20 (Planned)

T&F Used for Financial Aid	Gross Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid
Undergraduate, In-State	\$34,700,000	\$4,625,000	13.3%	\$4,625,000
Undergraduate, Out-of-State	\$11,450,000	\$2,415,000	21.1%	\$2,415,000
Graduate, In-State	\$2,900,000	\$58,200	2.0%	\$58,200
Graduate, Out-of-State	\$350,000	\$1,800	0.5%	\$1,800
First Professional, In-State	\$0	\$0	%	\$0
First Professional, Out-of-State	\$0	\$0	%	\$0
Total	\$49,400,000	\$7,100,000	14.4%	\$7,100,000
Total from Finance-T&F worksheet	\$51,300,000	\$7,100,000	13.8%	
In-State Sub-Total	\$37,600,000	\$4,683,200	12.5%	\$4,683,200
Additional In-State	\$1,600,000	\$0	%	\$0
Additional In-State from Financial Plan		\$0	%	

** Please note that the totals reported here will be compared with those reported by the financial aid office on the institution's annual S1/S2 report. Since the six-year plan is estimated and the S1/S2 is "actual," the numbers do not have to match perfectly but these totals should reconcile to within a reasonable tolerance level. Please be sure that all institutional offices reporting tuition/fee revenue used for aid have the same understanding of what is to be reported for this category of aid.*

Six-Year Plans - Part I (2018): FY2017-2018
University of Mary Washington
ECONOMIC DEVELOPMENT: CONTRIBUTIONS (HB515)

Requirement: As per § 23.1-306 (A) of the Code of Virginia each such plan and amendment to or affirmation of such plan shall include a report of the institution's active contributions to efforts to stimulate the economic development of the Commonwealth, the area in which the institution is located, and, for those institutions subject to a management agreement set forth in Article 4 (§ 23.1-1004 et seq.) of Chapter 10, the areas that lag behind the Commonwealth in terms of income, employment, and other factors.

Special Notes: The reporting period is FY18. The metrics serve as a menu of items that institutions should respond to as applicable and when information is available to them. Leave fields blank, if information is unavailable. Please note the narrative question at the bottom of the page. The response should be provided in a separate WORD or PDF document, as an attachment, if the Part II (Narrative) is not being updated.

Section A: Provide information for research and development (R&D) expenditures by source of fund with a breakdown by Science and Engineering (S&E) specific and non-S&E.

VA PLAN Strategy Reference	Section A: Research and Development (R&D) Expenditures by Source of Fund				
	Source of Funds	*S&E	Non S&E	Total	
4.3	Federal Government	\$38,438	\$353,423	\$391,861	
	State and Local Government		\$83,794	\$83,794	
	Institution Funds			\$0	
	Business		\$20,265	\$20,265	
	Nonprofit Organizations	\$115,667	\$59,864	\$175,531	
	All Other Sources			\$0	
	Total		\$154,105	\$517,346	\$671,451
	* S&E - Science and Engineering				

Section B: Provide number and dollar value of grants, contracts and sub-agreements by discipline. If your institution prefers to report by industry, please contact Jean Mottley (jeanmottley@schev.edu) to assist with changes.

VA PLAN Strategy Reference	Section B: Grants, Contracts and Sub-Agreements by Discipline						
4.3	Discipline	Category				Sub-agreements	
		Grants		Contracts		No.	\$ Value
		No.	\$ Value	No.	\$ Value		
	Engineering						
	Physical Science			1	\$2,429	1	\$12,824
	Environmental Science	1	\$4,917	1	\$5,070		
	Computer Science					1	\$6,787
	Life Sciences	3	\$107,133				
	Psych/Social	2	\$11,500	2	\$30,584	2	\$9,340
	Other Science						
	Non-Science and Engineering (non-S&E)	7	\$270,890	3	\$55,084	3	\$154,896
	Total	13	\$394,440	7	\$93,167	7	\$183,847

Section C: For the following items, provide responses in appropriate fields. Insert an X for yes/no responses. Use Number/Amount field for other information. A Comments field has been provided for any special information your institution may want to provide.

VA PLAN Strategy Reference	Section C: General Questions	Yes	No	Number/Amount	Comments
4.1	1. Does your institution offer an innovation/ entrepreneurship/career-themed student living-learning community?	x			
4.1	2. Does your institution offer startup incubation/accelerator programs? If yes, please comment if people/companies external to the institution can access them and, if so, how.	x			
4.2	3. Does your institution offer maker-space? If yes, please comment if people/companies external to the institution can access it and, if so, how.	x			
4.2	4. Does your institution have an entrepreneurship center? If yes, please comment if people/companies external to the institution can access it and, if so, how.	x			

4.2	5. Does your institution have Entrepreneur Executive(s)-in-Residence?	x			
4.1	6. Number of students paid through externally funded research grants or contracts.			22	
4.1	7. Number of entrepreneurship degrees/ courses/programs (credit and noncredit) offered?			43 courses	
4.1	8. Number of academic units that have courses/programs requiring a capstone project, experiential learning activities, or internships.			11	
4.1	9. Does your institution's tenure policy support commercialization? If yes, please provide brief explanation in comments section.	x			Commercialization activities would count as professional activity in a tenure review.
4.2	10. Does your institution offer a seed fund that awards money to start-ups? If yes, please comment on whether it awards funding only to university-based start-ups or to the general public as well?	x			University-based.
4.2	11. Does your institution offer translational research and/or proof of concept funding? If yes, please provide dollar amount available in FY18 in the number/amount field.	x			\$5,250
4.1	12. Does your institution offer continuing education programs to industry? If yes, please provide dollar value or headcount for such programs in the number/amount field.	x			

Section D: Provide information for research and commercialization grants by type, number, and dollar value with a breakdown by college and department. If additional rows are needed, please contact Jean Mottley (jeanmottley@schev.edu) to assist with changes.

VA PLAN Strategy Reference	Section D: Research and Commercialization Grants	No.	\$ Value	College	Department
4.3	SBIR - Small Business Innovation Research				
	STTR - Small Technology Transfer Research				
	CRCF - Commonwealth Research Commercialization Fund				
	*VBHRC - The Catalyst				
	Commonwealth Health Research Board				
	VRIF - Virginia Research Investment Fund				

**University must pay to be a member and collaborate with at least one other member university*

Section E. The Intellectual Property (IP) section captures information on disclosure, patent, and licensing activities. It is divided into two tables. Table 1 captures information regardless of source of funds or nature of entity to whom IP is transferred. Table 2 is required by § 23.1-102 subdivision 2 of the Code of Virginia. It details assignment of IP interests to persons or nongovernmental entities and the value of externally sponsored research funds received during the year from a person or nongovernmental entity by the institution, any foundation supporting the IP research performed by the institution, or any entity affiliated with the institution. Information is sought on research that yields IP regardless of the project's intent. Information is sought about IP transferred as a result of either basic or applied research. The table captures separate aggregate data on entities that have a principal place of business in Virginia and those with a principal place of business outside of Virginia.

VA PLAN Strategy Reference	Section E: Part 1 - All Patent Activity for FY 2017-18	No.
4.2	1. Number of Intellectual Property disclosures received	
	2. Number of Provisional Patent Applications filed during the year	
	3. Number of Patent Applications filed during the year (by type)	
	Design	
	Plant	
	Utility	
	Total	0
	4. Total number of Patent Applications pending (by type)	
	Design	
	Plant	
	Utility	
	Total	0
	5. Number of Patents awarded during the year (by type)	
	Design	
Plant		
Utility		
Total	0	

VA PLAN Strategy Reference	Section E: Part 2 - Other Information	Principal Place of Business in VA	Principal Place of Business outside VA
4.2	1. Value of funds from persons or nongovernmental entities to support intellectual property research	\$0	\$0
	2. Number of patents awarded during the year (by type) developed in whole or part from external projects funded by persons or nongovernmental entities:		
	a. Design Patent	0	0
	b. Plant Patent	0	0
	c. Utility Patent	0	0
	d. Total	0	0
	3. Number of assignments of intellectual property interests to persons or nongovernmental entities	0	0
	4. Total number of intellectual property licenses executed in FY 17-18	0	0
5. Number of start-ups created through IP licensing in FY17-18	0	0	
6. Amount of licensing revenue in FY17-18 resulting from all intellectual property licenses	\$0	\$0	
7. Number of jobs created as a result of university start-ups.	0	0	

Section F: These items are VCCS specific. Please provide responses in appropriate fields. A Comments field has been provided for any special information the VCCS may want to provide.

VA PLAN Strategy Reference	Section F: General Questions - VCCS Specific	Number	Value	Comments
4.1	1. Number and value of federal, state or private grant resources to support development of, or access to, training programs leading to workforce credentials, certifications and licensures.			
	2. Number of training programs leading to workforce certifications and licensures.			
	3. Number of students who earned industry recognized credentials stemming from training programs.			
	4. Number of industry-recognized credentials obtained, including certifications and licenses.			
	5. Number of Career/Technical Education certificates, diplomas and degrees awarded that meets regional workforce needs.			

NARRATIVE REQUIREMENT:

Contributions to Economic Development – Describe the institution's contributions to stimulate the economic development of the Commonwealth and/or area in which the institution is located. *If applicable*, the information should include:

- a. University-led or public-private partnerships in real estate and/or community redevelopment.
- b. State industries to which the institution's research efforts have direct relevance.
- c. High-impact programs designed to meet the needs of local families, community partners, and businesses.
- d. Business management/consulting assistance.