

INSTRUCTIONS FOR SUBMITTING 2021 INSTITUTIONAL SIX-

Due Date: July 1, 2021

PLEASE READ INSTRUCTIONS CAREFULLY

Six-year Plan Requirement

The Higher Education Opportunity Act of 2011 (HJOA) requires Virginia's public institutions of higher education to prepare and submit six-year plans. (See below for complete code reference.) During the 2015 General Assembly session, joint resolutions approved by the House (HJR 555) and Senate (SJ 228) also require that the mission, vision, goals, and strategies expressed in the Virginia Plan, the statewide strategic plan, guide the development of the strategic plan and six-year plan at each public institution of higher education, as well as the agency plan for SCHEV, and that SCHEV report annually on the Commonwealth's progress toward achieving these goals and targets to the Governor. General

2021 Six-year Plan Format

The 2021 Six-Year Plan consists of a workbook and an accompanying narrative. The workbook has an Instructions page, Institution ID page and five parts/worksheets: In-state undergraduate Tuition and Fee Increase Rate, Tuition and Other Nongeneral Fund Revenue, Academic-Financial, General Fund (GF) Request, and Financial Aid. **Note: Shaded cells contain formulas.** Instructions for the narrative are provided in a separate attachment. The Enrollment/Degree Projections are being developed in a separate process, but will be incorporated into the six-year plan review. The 2021 Six-Year Plans are due July 1, 2021. The review group (referred to as Up Six) as outlined in § 23.1-306 - see Legislative Reference section below - will meet with each institution during the months of July and August to review the institution's plan and provide comments. If changes to the plans are recommended, revised institutional submissions are due no later than October 1 or immediately following an institution's Board of Visitors' meeting, if it is later than October 1.

INSTRUCTIONS FOR SECTIONS

1. In-state Undergraduate Tuition and Fee Increase Rate Plan

Provide annual planned increases in in-state undergraduate tuition and mandatory E&G fees and mandatory non-E&G fees in 2022-24 biennium. The tuition and fee charges for in-state undergraduate students should reflect the institution's estimate of reasonable and necessary charges to students based on the mission, market capacity and other factors with the assumption of no new state general fund support.

2. Tuition and Other Nongeneral Fund Revenue

Based on assumptions of no new general fund, enrollment changes and other institution-specific conditions, **provide total collected or projected to collect revenues (after discounts and waivers)** by student level and domicile (including tuition revenue used for financial aid), and other NGF revenue for educational and general (E&G) programs; and mandatory non-E&G fee revenues from in-state undergraduates and other students as well as the total auxiliary revenue. DO NOT INCLUDE

3. Academic-Financial Plan

The Academic Plan, (3A), of this worksheet should contain academic, finance, and support service strategies the institution intends to employ in meeting state needs/goals as found in the Virginia Plan. Information related to the Virginia Plan and more specific state priorities is provided below. Provide a short title for each strategy. Indicate the total amount for the strategy, any internal reallocation to support the strategy and the amount of tuition revenue that will be used to support the strategy. Provide a short description of the strategy, including a specific reference as to where more detailed information about the strategy can be found in the Narrative document, in column J. Provide any pertinent information for consideration in 2024 through 2028 in column K. **All salary information must be provided in 3B. No salary information should be included in 3A. Strategies for student financial aid, other than those that are provided through tuition revenue, should not be included on this table; they should be included in Part 4 of the plan, General Fund Request.** Funding amounts in the first year should be incremental. However, if the costs continue into the second year, they should

Pathways to Opportunity: The Virginia Plan for Higher Education. In the column labeled "VP Goal," identify the goal of the The Virginia Plan (VP) that applies to each institutional strategy using the appropriate number (i.e., 1, 2, or 3). The three VP goals are listed below. In the Narrative document

The Virginia Plan has three major goals (please refer to the Plan at <https://www.schev.edu/index/statewide-strategic-plan/virginia-plan-overview> for more information about the strategies under each goal):

GOAL 1 EQUITABLE: CLOSE ACCESS AND COMPLETION GAPS.

GOAL 2 AFFORDABLE: LOWER COSTS TO STUDENTS.

GOAL 3 TRANSFORMATIVE: EXPAND PROSPERITY.

The Financial Plan, 3B, of this worksheet pertains to the 2022-24 biennium. Complete the lines appropriate to your institution. **As completely as possible, the items in the academic plan and financial plan should represent a complete picture of the institution's anticipated use of projected tuition revenues. For every strategy in 3A and every item in 3B of the plan, the total amount and the sum of the reallocation and tuition revenue should equal one another.** Two additional rows, "Anticipated Nongeneral Fund Carryover" and "Nongeneral Fund for Current Operations" are available for an institution's use, if an institution cannot allocate all of its tuition revenue to specific strategies in the plan. Given the long standing practice that agencies should not assume general fund support for operation and maintenance (O&M) of new facilities, O&M strategies should not

4. General Fund (GF) Request

Indicate items for which you anticipate making a request for state general fund support in the 2022-24 biennium. The item can be a supplement to a strategy or item from the academic and financial plan or it can be a free-standing request for which no tuition revenue would be used. If it is a supplement to a strategy or item from the academic and financial plan, use the same title used in Part 3 and place it in bold print to draw attention to it's connection to Part 3. Also, describe in the Notes column how

5. Financial Aid

Provide a breakdown of the projected source and distribution of tuition and fee revenue redirected to financial aid. To ensure compliance with the state prohibition that in-state students not subsidize out-of-state students and to provide the review group with a scope of the strategy, projections must be made for each of the indicated categories. Please be aware that this data will be compared with similar data provided by other institutional offices in order to ensure overall consistency. (Please do not alter shaded cells that contain formulas.) **"Other Discounts and Waiver"** means the totals of any unfunded full or partial tuition waiver reducing the students' charges, including Virginia Military Survivors and Dependent Education Program and the Senior Citizens Tuition Waiver. Do not include the tuition differential for the

Special Notes:

Enrollment/Degree Projections: Detailed six-year enrollment/degree projections are being collected through a separate process. These projections will be incorporated in the Six-Year Plan as part of the July and August institutional meetings with the Op Six.

BOV Approval: Final board approval of the Six-Year Plan should be done at the earliest possible fall meeting. HB 897 (2018) specified that initial plans do not get posted on the General Assembly's website and that final plans should be submitted to DLAS no later than December 1. However, we are requesting that institutions submit final plans with their responses to Op Six Comments on October 1 (or as soon after fall board meetings as possible) as has been done in the past. We post the responses

Accessibility: All files need to be checked for accessibility prior to submitting them. Information on accessibility is provided at this link on SCHEV's website: <http://schev.edu/index/accessibility/creating-accessible-content>. The first link, "How to Make Your MS Office Documents Accessible" can be used to learn how to check documents. Only errors, not warnings, must be addressed.

Contacts for Questions:

General Questions - Jean Huskey (jeanhuskey@schev.edu)

Academic - Beverly Rebar (beverlyrebar@schev.edu)

Finance - Yan Zheng (yanzheng@schev.edu)

Financial Aid - Lee Andes (leeandes@schev.edu)

Enrollment/Degree Projections - Tod Massa (todmassa@schev.edu)

Legislative Reference:

§ 23.1 - 306. Institutional Six-Year Plans.

A. The governing board of each public institution of higher education shall (i) develop and adopt biennially and amend or affirm annually a six-year plan for the institution;
(ii) submit such plan to the Council, the General Assembly, the Governor, and the Chairmen of the House Committee on Appropriations, the House Committee on Education, the Senate Committee on Education and Health, and the Senate Committee on Finance no later than July 1 of each odd-numbered year; and (iii) submit amendments to or an affirmation of that plan no later than July 1 of each even-numbered year or at any other time permitted by the Governor or General Assembly to the Council, the General Assembly, the Governor, and the Chairmen of the House Committee on Appropriations, the House Committee on Education, the Senate Committee on Education and Health, and the Senate Committee on Finance. 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
B. The Secretary of Finance, Secretary of Education, Director of the Department of Planning and Budget, Executive Director of the Council, Staff Director of the House Committee on Appropriations, and Staff Director of the Senate Committee on Finance, or their designees, shall review each institution's plan or amendments and provide comments to the institution on that plan by September 1 of the relevant year. Each institution shall respond to any such comments by October 1 of that year
C. Each plan shall be structured in accordance with, and be consistent with, the objective and purposes of this chapter set forth in § 23.1-301 and the criteria developed pursuant to § 23.1-309 and shall be in a form and manner prescribed by the Council, in consultation with the Secretary of Finance, the Secretary of Education, the Director of the Department of Planning and Budget, the Director of the Council, the Staff Director of the House Committee on Appropriations, and the Staff Director of the Senate Committee on Finance.
D. Each six-year plan shall (i) address the institution's academic, financial, and enrollment plans, including the number of Virginia and non-Virginia students, for the six-year period; (ii) indicate the planned use of any projected increase in general fund, tuition, or other nongeneral fund revenues; (iii) be based upon any assumptions provided by the Council, following consultation with the Department of Planning and Budget and the staffs of the House Committee on Appropriations and the Senate Committee on Finance, for funding relating to state general fund support pursuant to §§ 23.1-303, 23.1-304, and 23.1-305 and subdivision 9: (iv) be aligned with the institution's six-year enrollment

1. Financial planning reflecting the institution's anticipated level of general fund, tuition, and other nongeneral fund support for each year of the next biennium;
 2. The institution's anticipated annual tuition and educational and general fee charges required by (i) degree level and (ii) domiciliary status, as provided in § 23.1-307;
 3. Plans for providing financial aid to help mitigate the impact of tuition and fee increases on low-income and middle-income students and their families as described in subdivision 9, including the projected mix of grants and loans;
 4. Degree conferral targets for undergraduate Virginia students;
 5. Plans for optimal year-round use of the institution's facilities and instructional resources;
 6. Plans for the development of an instructional resource-sharing program with other public institutions of higher education and private institutions of higher education;
 7. Plans with regard to any other incentives set forth in § 23.1-305 or any other matters the institution deems appropriate;
 8. The identification of (i) new programs or initiatives including quality improvements and (ii) institution-specific funding based on particular state policies or institution-specific programs, or both, as provided in subsection C of § 23.1-307; and
9. All institutional student financial aid commitment that, in conjunction with general funds appropriated for that purpose, provides assistance to students from both low-income and middle-income families and takes into account the information and recommendations resulting from the review of federal and state financial aid programs and institutional practices conducted pursuant to subdivisions B 2 and C 1 of § 23.1-300. In developing such plans, each public institution of higher education shall consider potential future impacts of tuition increases on the Virginia College Savings Plan and ABLE Savings Trust Accounts (§ 23.1-700 et seq.) and shall discuss such potential impacts with the Virginia College Savings Plan. The chief executive officer of the Virginia College Savings Plan shall provide to each institution the Plan's assumptions underlying the contract pricing of the program.
- F. 1. In conjunction with the plans included in the six-year plan as set forth in subsection D, each public institution of higher education, Richard Bland College, and the Virginia Community College System may submit one innovative proposal with clearly defined performance measures, including any request for necessary authority or support from the Commonwealth, for a performance pilot. If the General Assembly approves the proposed performance pilot, it shall include approval language in the general appropriation act. A performance pilot shall advance the objectives of this chapter by addressing innovative requests related to college access, affordability, cost predictability, enrollment management subject to specified commitments regarding undergraduate in-state student enrollment, alternative tuition and fee structures and affordable pathways to degree attainment, internships and work study.
2. A performance pilot may include or constitute an institutional partnership performance agreement, which shall be set forth in a memorandum of understanding that includes mutually dependent commitments by the institution, the Commonwealth, and identified partners, if any, related to one or more of the priorities set forth in subdivision 1 or set forth in a general appropriation act. No such institutional partnership performance agreement shall create a legally enforceable obligation of the
 3. No more than six performance pilots shall be approved in a single session of the General Assembly.
 4. Development and approval of any performance pilot proposal shall proceed in tandem with consideration of the institution's six-year plan, as follows:
 - a. An institution that intends to propose a performance pilot shall communicate that intention as early as practicable, but not later than April 1 of the year in which the performance pilot will be proposed, to the reviewers listed in subsection B, the co-chairmen of the Joint Subcommittee on the Future Competitiveness of Virginia Higher Education, and the Governor. In developing a proposed performance pilot, the institution shall consider the Commonwealth's educational and economic policies and priorities, including those reflected in the Virginia Plan for Higher Education issued by the Council, and the economic development policy developed pursuant to § 23.2-205, the strategic plan developed
 - b. An institution that submits a performance pilot shall include the one innovative proposal with clearly defined performance measures, and any corresponding authority and support requested from the Commonwealth, with its submission of the preliminary version of its six-year plan pursuant to clause (ii) of subsection A or with its preliminary amendment or affirmation submission pursuant to clause (iii) of

c. The reviewers listed in subsection B, or their designees, shall review and comment on any proposed performance pilot in accordance with the six-year plan review and comment process established in subsection B and may expedite such review and comment process to facilitate the executive and legislative budget process or for other reasons. No later than October 15 of the relevant year, the reviewers shall communicate to the Governor and the Chairmen of the House Committee on Appropriations and the Senate Committee on Finance their recommendations regarding each performance pilot proposal. Such recommendations shall include the reviewers' comments regarding

d. Each performance pilot proposal shall include evidence of its approval by the institution's governing board and, if accepted, shall be referenced in the general appropriation act.

Six-Year Plans - Part I (2021): 2022-23 through 2027-28

Due: July 1, 2021

Institution:

Institution UNITID:

Individual responsible for plan

Name:

Email address:

Telephone number:

**Part 1: In-State Undergraduate Tuition and Mandatory Fee Increase Plans in 2022-24 Biennium
Richard Bland College**

Instructions: Provide annual planned increases in in-state undergraduate tuition and mandatory E&G fees and mandatory non-E&G fees in 2022-24 biennium. The tuition and fee charges for in-state undergraduate students should reflect the institution's estimate of reasonable and necessary charges to students based on the mission, market capacity and other factors with the assumption of no new state general fund support.

In-State Undergraduate Tuition and Mandatory E&G Fees

	2021-22	2022-23		2023-24	
	Charge (BOV approved)	Planned Charge	% Increase	Planned Charge	% Increase
Regular ISUG	\$6,000	\$6,180	3.0%	\$6,365	3.0%
ISUG in Verto	\$0	\$0	0.0%	\$0	0.0%

In-State Undergraduate Mandatory Non-E&G Fees

	2021-22	2022-23		2023-24	
	Charge (BOV approved)	Planned Charge	% Increase	Planned Charge	% Increase
Regular ISUG	\$2,160	\$2,225	3.0%	\$2,292	3.0%
ISUG in Verto	0	0	0	0	0

Part 2: Tuition and Other Nongeneral Fund (NGF) Revenue Richard Bland College

Instructions: Based on assumptions of no new general fund, enrollment changes and other institution-specific conditions, **provide total collected or projected to collect revenues (after discounts and waivers)** by student level and domicile (including tuition revenue used for financial aid), and other NGF revenue for educational and general (E&G) programs; and mandatory non-E&G fee revenues from in-state undergraduates and other students as well as the total auxiliary revenue .

Items	2020-2021 (Actual)	2021-2022 (Estimated)	2022-2023 (Planned)	2023-2024 (Planned)
	Total Collected Tuition Revenue	Total Collected Tuition Revenue	Total Projected Tuition Revenue	Total Projected Tuition Revenue
E&G Programs				
Undergraduate, In-State	\$5,816,368	\$4,000,000	\$4,738,000	\$5,304,500
Undergraduate, Out-of-State	\$67,801	\$97,500	\$301,275	\$414,060
Undergraduate, In-State (Verto)	\$0	\$0	\$0	\$0
Undergraduate, Out-of-State (Verto)	\$0	\$0	\$0	\$0
Graduate, In-State	\$0	\$0	\$0	\$0
Graduate, Out-of-State	\$0	\$0	\$0	\$0
Law, In-State	\$0	\$0	\$0	\$0
Law, Out-of-State	\$0	\$0	\$0	\$0
Medicine, In-State	\$0	\$0	\$0	\$0
Medicine, Out-of-State	\$0	\$0	\$0	\$0
Dentistry, In-State	\$0	\$0	\$0	\$0
Dentistry, Out-of-State	\$0	\$0	\$0	\$0
PharmD, In-State	\$0	\$0	\$0	\$0
PharmD, Out-of-State	\$0	\$0	\$0	\$0
Veterinary Medicine, In-State	\$0	\$0	\$0	\$0
Veterinary Medicine, Out-of-State	\$0	\$0	\$0	\$0
Other NGF	\$0	\$0	\$0	\$0
Total E&G Revenue	\$5,884,169	\$4,097,500	\$5,039,275	\$5,718,560

Non-E&G Fee Revenue	2020-2021 (Actual)	2021-2022 (Estimated)	2022-2023 (Planned)	2023-2024 (Planned)
	Total Tuition Revenue	Total Tuition Revenue	Total Tuition Revenue	Total Tuition Revenue
In-State undergraduates	\$449,133	\$1,440,000	\$1,705,680	\$1,905,500
In-State undergraduates (Verto)	\$0	\$0	\$0	\$0
All Other students	\$5,236	\$10,800	\$33,372	\$45,835
Out-of-state (Verto)	\$0	\$4,000,000	\$4,500,000	\$5,000,000
Total non-E&G fee revenue	\$454,369	\$5,450,800	\$6,239,052	\$6,951,335
Total Auxiliary Revenue (incl R&B , parking, event fees etc.)	\$0	\$0	\$0	\$0

Part 4: General Fund (GF) Request Institution Name

Instructions: Indicate items for which you anticipate making a request for state general fund in the 2022-24 biennium. The item can be a supplement to a strategy or item from the academic and financial plan or it can be a free-standing request for which no tuition revenue would be used. If it is a supplement to a strategy or item from the academic and financial plan, use the same title used in Part 3 and place it in bold print to draw attention to it's connection to Part 3. Also, describe in the Notes column how additional general fund will enhance or expand the strategy. Requests for need-based financial aid appropriated in program 108 should be included here. If additional rows are added, please update the total costs formulas.

Priority Ranking	Initiatives Requiring General Fund Support						Notes
			Biennium 2022-2024 (7/1/22-6/30/24)				
	Strategies (Match Academic-Financial Worksheet Short Title)	VP Goal	2022-2023		2023-2024		
			Total Amount	GF Support	Total Amount	GF Support	
1			Compliance	2	\$525,000	\$525,000	\$1,050,000
2	Student Success	1,2,3	\$1,242,190	\$1,031,642	\$2,484,380	\$2,063,284	Sec B: Without investment, GPS will need to be discontinued or greatly reduced in scope as any proposed tuition increases would be insufficient to keep the program sustainable or produce any negligible growth. The difference in the Total Amount vs. the GF Amount for the Guided Pathways in the 25% of the total Guided Pathways annual cost that will be provided by RBC through resource reallocation.
3	RBC Online	1,2,3	\$635,000	\$635,000	\$1,270,000	\$1,270,000	Sec B: Without investment, RBC Online will need to be discontinued or greatly reduced in scope as any proposed tuition increases would be insufficient to keep the program sustainable or produce any negligible growth
4	Shared Services Consortium	2	\$200,000	\$200,000	\$400,000	\$400,000	This is intended to be a finite request limited to the design, implementation, and start-up of the Shared Services Consortium (SSC). The SSC is intended to be self-sufficient in a reasonable time-frame following full implementation.
			\$2,602,190	\$2,391,642	\$5,204,380	\$4,783,284	

Part 5: Financial Aid Plan
Richard Bland College

Instructions: Provide a breakdown of the projected source and distribution of tuition and fee revenue redirected to financial aid. To ensure compliance with the state prohibition that in-state students not subsidize out-of-state students and to provide the review group with a scope of the strategy, projections must be made for each of the indicated categories. Please be aware that this data will be compared with similar data provided by other institutional offices in order to ensure overall consistency. (Please do not alter shaded cells that contain formulas.)

"Other Discounts and Waiver" means the totals of any unfunded full or partial tuition waiver reducing the students' charges, including Virginia Military Survivors and Dependent Education Program and the Senior Citizens Tuition Waiver. Do not include the tuition differential for the tuition exceptions.

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

*2020-21 (Actual) Please see footnote below								Compliance with § 4-5.1.a.i
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)	
Undergraduate, In-State	\$5,816,368	\$60,000	1.0%	\$60,000	\$92,407	\$0	\$5,908,775	\$0 Compliant
Undergraduate, Out-of-State	\$67,801	\$0	%	\$0	\$0	\$0	\$67,801	
Graduate, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	
Graduate, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	
Total	\$5,884,169	\$60,000	1.0%	\$60,000	\$92,407	\$0	\$5,976,576	

2021-22 (Estimated)								Compliance with § 4-5.1.a.i
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)	
Undergraduate, In-State	\$4,000,000	\$60,000	1.5%	\$60,000	\$185,000	\$0	\$4,185,000	\$0 Compliant
Undergraduate, Out-of-State	\$97,500	\$0	%	\$0	\$0	\$0	\$97,500	
Graduate, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	
Graduate, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	
Total	\$4,097,500	\$60,000	1.5%	\$60,000	\$185,000	\$0	\$4,282,500	

2022-23 (Planned)								Compliance with § 4-5.1.a.i
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)	
Undergraduate, In-State	\$4,738,000	\$60,000	1.3%	\$60,000	\$185,000	\$0	\$4,923,000	\$0 Compliant
Undergraduate, Out-of-State	\$301,275	\$0	%	\$0	\$0	\$0	\$301,275	
Graduate, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	
Graduate, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	
Total	\$5,039,275	\$60,000	1.2%	\$60,000	\$185,000	\$0	\$5,224,275	

2023-24 (Planned)								Compliance with § 4-5.1.a.i
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)	
Undergraduate, In-State	\$5,304,500	\$60,000	1.1%	\$60,000	\$185,000	\$0	\$5,489,500	\$0 Compliant
Undergraduate, Out-of-State	\$414,060	\$0	%	\$0	\$0	\$0	\$414,060	
Graduate, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	
Graduate, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	
Total	\$5,718,560	\$60,000	1.0%	\$60,000	\$185,000	\$0	\$5,903,560	

* 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.

2021 SIX-YEAR PLAN NARRATIVE (Part II)

INSTITUTION: Richard Bland College of William and Mary

OVERVIEW

The totality of the six-year plan should describe the institution's goals as they relate to state goals found in the *Pathways to Opportunity: The Virginia Plan for Higher Education*; the Higher Education Opportunity Act of 2011 (TJ21); and the Restructured Higher Education Financial and Administrative Operations Act of 2005.

The instructions under institutional mission and alignment to state goals, below, ask for specific strategies, in particular related to equity, affordability and transformative outcomes. Other sections will offer institutions the opportunity to describe additional strategies to advance institutional goals and state needs. ***Please be as concise as possible with responses and save this narrative document with your institution's name added to the file name.***

SECTIONS

Section A. Pandemic Impact: Briefly discuss, in one to two paragraphs, how the pandemic has impacted your institution. What things did your institution already have in place that proved helpful? What lessons were learned? What short-term changes have been made? What long-term changes will be made? What are the concerns moving forward?

RESPONSE:

Before the issuance of the Governors Executive Order on March 12, 2020, Richard Bland College had already activated its emergency management team (EMT) for the purpose of assessing the circumstances and developing recommendations to the President in a timely manner. The EMT, which is appointed by the President on an annual basis, operated in a manner consistent with the National Incident Management System (NIMS) to work together to prevent, protect against, mitigate, respond to and recover from the pandemic. The EMT was expanded to include additional stakeholders and weekly meetings were scheduled to examine issues, develop solutions, and issue directives and public communications. The EMT developed a reopening plan that was submitted and approved by SCHEV in July, 2020. This plan established several mitigation strategies to keep the campus community safe; they included dedensification, social distancing, wearing of face coverings, and the interruption of the intercollegiate athletic program. Since RBC does not have an infirmary or any related health care support, a tele-med agreement for COVID-19 care was established with Virginia Commonwealth University (VCU) and a testing agreement was established with Virginia State University (VSU). Isolation and quarantine facilities were established on campus for positive cases and cases of exposure, and case managers tracked and supported those affected individuals.

During academic year 2020-21, there were significant operational changes in response to the COVID-19 pandemic. This included a substantial shift of academic teaching modes from a baseline of approximately 80% of all classes being conducted in a traditional in-seat format to the majority of classes being conducted via some form of remote instruction with a significant increase in online courses. The academic team worked to develop four course modes to meet the needs of our students which included: (1) asynchronous online, (2) synchronous online, (3) fully in-seat (at reduced classroom capacity to remain in compliance with social distancing), and (4) in-seat with a remote option. Information Technology Services collaborated with the academic team to enhance classroom technology to support concurrent remote and in-seat instruction through video conferencing. Faculty participated in training on new technology and best pedagogical

practices for online instruction. Laboratory classes were offered in person with some lower level labs offered with reduced hours to accommodate social distancing. For international students, the academics team created online sections in math, computer science, and physics to meet the guidelines established for remote education for students abroad. From a student support perspective, there was a shift towards offering online tutoring, advising, and access to the bookstore. The Registrar also transitioned to a fully online service. For students, faculty and staff on-campus we established protocols for safe access to public spaces and hired staff to enforce adherence to the mask mandate and other safety protocols. In FY '22, we anticipate a return to a largely on-campus schedule of instruction; however, we will continue to offer more asynchronous and synchronous online offerings that are designed to meet an increased student demand for flexibility in instruction. If necessary, online courses for international students may need to continue.

Lessons learned are many. From a student success perspective, we learned that most student support services should be available in person and online. We learned that there is a substantial need for internet access at a student's home in order for them to be successful and that additional support from counseling services may be necessary. From an academic perspective, we learned that hybrid courses offer increased flexibility but that it may not be the best option for first-year students who are more accustomed to directive teaching modalities. We further learned that ongoing training in alternate teaching modes and best practices should be mandatory for all full-time and adjunct faculty.

A more detailed response is provided in the **Survey of Use of Federal Pandemic Funding**.

Section B. Institutional Mission, Vision, Goals, Strategies, and Alignment to State Goals: Provide a statement of institutional mission and indicate if there are plans to change the mission over the six-year period.

Provide a brief description of your institutional vision and goals over the next six years, including numeric targets where appropriate. Include specific strategies (from Part 3 – Academic-Financial Plan and Part 4 – General Fund Request) related to the following state themes and goals:

- **Equitable:** Close access and completion gaps. Remove barriers to access and attainment especially for Black, Hispanic, Native American and rural students; students learning English as a second language; students from economically disadvantaged backgrounds; and students with disabilities.
- **Affordable:** Lower costs to students. Invest in and support the development of initiatives that provide cost savings to students while maintaining the effectiveness of instruction.
- **Transformative:** Expand prosperity. Increase the social, cultural and economic well-being of individuals and communities within the Commonwealth and its regions. This goal includes efforts to diversify staff and faculty pools.

Strategies also can cross several state goals, notably those related to improved two-year and four-year transfer, and should be included here. If applicable, include a short summary of strategies related to research. The description of any strategy should be one-half page or less in length. Be sure to use the same short title as used in the Part 3 and Part 4 worksheets. If federal stimulus funds will fund activities and are included in Part 3 as reallocations, please note how they will be used.

RESPONSE:

In February, 2020, the William and Mary Board of Visitors, in its oversight role for Richard Bland College (RBC), approved the College's 2020-2025 strategic plan, "Seize Your Potential." The Plan contains well-

defined core values and a revised mission statement, and it sets forth goals, objectives, and performance indicators that will provide focus and direction for the future success of the College. The mission is:

To prepare our students for a lifetime of endless potential. This is accomplished by preparing students for university transfer through academically rigorous programs grounded in the liberal arts tradition of William & Mary and by expanding access to college credentials through strategic partnerships, specialized programming, and scalable innovation.

To achieve the mission, the College has developed four strategies:

Strategy 1 Compliance

Compliance and institutional improvement continue to be a priority for Richard Bland College. The intense level of scrutiny by oversight agencies and auditors continues, placing substantial pressure on monetary and human resources at the College.

Over the past two years, issues related to separation of duties and change management in both Information and Technology Services (ITS) and Human Resources (HR) have been addressed through partial funding from the General Assembly. Unfulfilled needs and compliance issues continue to exist. There are three additional compliance initiatives proposed for funding.

To fulfill the College's compliance plan, additional funding for a Director of Compliance (\$125,000) and program support technician (\$75,000) is requested to oversee the maintenance of the RBC policy manual, ongoing compliance training for personnel, management of SACS-COC standards and principles, Title IX and Clery Act operations, and other compliance-related matters. Centralization of these key processes is essential for compliance effectiveness as all of these tasks are currently spread across multiple, disparate and over-burdened functional units.

Recent cyberattacks on Colonial Pipeline, JBS Foods, and Brenntag Chemical have brought to attention the growing number of cybersecurity threats and the risks posed to industry and institutions of higher education are considered highly vulnerable. To effectively mitigate against expanding technology risks, RBC's Information and Technology Services (ITS) department requests funding for an incremental Information Technology position (\$125,000). This IT security resource allows proactive steps to protect critical infrastructure against malware, computer viruses, worms, Trojan horses, ransomware, spyware, adware, rogue software, wiper and scareware. This resource will facilitate establishing policy in alignment with policies of the Commonwealth. Additionally, the ITS unit will be better positioned for security compliance and enforcement through role-based security and expanded security awareness training.

Consistent with the Governor's ONE Virginia Strategic Plan for Inclusive Excellence, the College has developed and submitted a strong diversity, equity and inclusion plan. The successful implementation of the Plan will require fiscal support. Governor Northam's ONE Virginia Plan details a strategy for "advanc[ing] DE&I through changes in [...] services, systems, and operations." Hiring a Director of Diversity, Equity, and Inclusion constitutes RBC's first step toward inclusive excellence delineated in the Plan's "institutional commitment" to diversity, equity, and inclusion work.

The initiatives of the Racial Justice & Equity task force (described in section L), fulfilling step two in its analysis of "current policies, practice, and programs", enables the Director to effect RBC's progress through the third, fourth, and fifth steps outlined in the Commonwealth's ONE Virginia Plan. The Director will be charged with helping the College achieve its aspirational goal of people of color representing 50% of membership in each of its functional units – especially in middle to upper-level leadership ranks – to be more representative of the students we serve.

Requested funds for Compliance strategy: \$1,050,000 (year 1 and 2)

Compliance Manager Initiative

Compliance Program Manager
FY22: \$125,000 / FY23: \$125,000 \$ 250,000

Compliance Program Support Tech
FY22: \$75,000 / FY23: \$75,000 \$ 150,000

Cybersecurity Infrastructure Initiative

Incremental IT Security Resource
FY22: \$125,000 / FY23: \$125,000 \$ 250,000

Diversity, Equity and Inclusion Employee Program Initiative

DEI Director
FY22: \$125,000 / FY23: \$125,000 \$ 250,000

DEI Program Support Tech
FY22: \$75,000 / FY23: \$75,000 \$ 150,000

**Strategy 2
Student Success**

Student success programs promote student engagement, learning and progress toward the student's own goals. Over the past several years, student success has been firmly cemented as a priority for Richard Bland College. There are four student success initiatives proposed for funding:

Guided Pathways for Success (GPS@RBC)

Since RBC's 2016 pilot project to test capacity for data-driven approaches to student retention and success, the College has experienced a fundamental cultural shift resulting in a commitment to comprehensive guided pathways reform. RBC has historically based development strategies around the four key principles found in the American Association of Community Colleges (AACC) Pathways Project: (1) map pathways to student end goals, (2) help students choose and enter a program pathway, (3) keep students on path, and (4) ensure that students are learning. RBC's previous Exceptional Student Experience framework was adapted from these principles, but exigencies and resource limitations led to the delay of important aspects of the pathways work of ESE@RBC. Its successor, the Guided Pathways for Success (GPS@RBC) framework, is the primary focal point of the RBC six-year plan and the future-sighted strategic plan of the College. It commits to comprehensive guided pathways reforms through the following student value propositions:

- easy to navigate onboarding,
- clearly defined pathways that outline workforce-friendly majors and credentials, and effective processes for entering a pathway,
- a work-integrated curriculum focusing on required soft skills,
- fast track programs to get academically underprepared students into and through crucial English and math courses,
- high-touch, intensive student-centric support across the college, and

- tools for faculty, staff and students that provide useful information about assessment and progress.

A report from the Community College Resource Center (CCRC) at Columbia University Teachers College on “The Economics of Guided Pathways: Cost, Funding, and Value” (October 2020) estimates the Implementation Total Resource Cost (ITRC) of comprehensive guided pathways reforms at small colleges (under 2,000 FTEs) as \$670 per FTE per year over four years.

SCHEV’s E05 reporting shows an annual average of 1,257 FTEs for Richard Bland College over the last five years (2015/2016-2019/2020). Calculated accordingly, the resulting Implementation Total Resource Cost (ITRC) of guided pathways reforms at RBC would amount to \$842,190.00 per year over four years at a total cost of \$3,368,760.00.

The CCRC estimates the implementation costs by category in undiscounted 2020 dollars for a small college of 1,257 FTEs as follows in Table 1:

Category	Dollar Amount	Approx. % of Annual Budget
Program mapping	\$581,190	17%
Student success courses	\$54,741	2%
Student advisement	\$1,662,891	49%
Teaching and learning	\$114,760	3%
Governance and management	\$410,181	12%
IT investments	\$115,891	3%
Professional development	\$367,353	11%
Other direct costs	\$61,753	2%
Total resource cost (four years)	\$3,368,760	100%
Total cost per FTE	\$670	

Table 1. Implementation Costs for Guided Pathways for Small Colleges Adjusted for 1,257 FTEs (modified from “The Economics of Guided Pathways” 11)

Operational Total Resource Cost (OTRC) for guided pathways after implementation remains significant at about \$450 per FTE annually, which largely represents ongoing investment in student advising personnel costs, but this cost is offset by tuition dollars gained through higher retention rates. Once implemented, guided pathways practices also result in significant gains in value for students who, thanks to better advising and being able to build momentum toward completion of their end goal, ultimately take fewer surplus credits, make faster academic progress, and experience higher rates of degree completion. According to the CCRC, this approach reduces the total cost of college even when tuition was raised to offset comprehensive guided pathways reforms which “were sometimes either short-run or postponed until guided pathways was partially implemented (and most were below 5%)” (“Economics of Guided Pathways” 17).

RBC has demonstrated a commitment to comprehensive guided pathways reform through (1) its efforts to begin implementation of pathways principles in ESE@RBC, (2) its recent work in the inaugural cohort of the American Council on Education's (ACE) Learner Success Lab, a far-reaching, 18-month self-assessment structured around ACE's Comprehensive Model for Learner Success and RBC's vision for a guided pathways framework, and (3) its admission into the Community College Research Center's (CCRC) summer institute on "Guided Pathways at Rural Colleges: Using Data to Launch Large-Scale Reform" (June 14-June 24, 2021).

As a result, RBC received assistance in identifying opportunities for investment in order to realize its vision and SCHEV's vision for affordable, equitable, and transformative postsecondary education using a guided pathways framework. They include (1) the hiring of a director of Guided Pathways for Success and of additional learner mentors and their certification as career coaches and/or their training in guided pathways methods of creating individualized education plans based on academic and career interests, (2) investment in a concerted faculty initiative to complete comprehensive program mapping and meta-major creation that effectively identifies pathways and develops/identifies workforce competencies within the curriculum while fostering academic/career communities with partners, (3) supporting interactive and experiential learning opportunities and professional development for faculty teaching crucial English and Math courses as well as "light-the-fire" learning experiences in topics of student interest in their first term, and (4) investing in personnel and digital resources to optimize advisor case management and to support data-informed decision making across units of the College.

RBC is requesting funds to implement guided pathways to avoid passing on the costs to students. Resource reallocation could absorb about 25% of the \$842,190.00 annual costs of guided pathways implementation over the next four years through the placement of current personnel in new roles, leaving 75% of implementation costs remaining: \$631,642.00 per year for four years.

Diversity, Equity and Inclusion Student Program

Mark Akiyama, a Research Associate at the Community College Research Center (CCRC) of Columbia University Teachers College, conveyed to representatives from RBC at the June 2021 CCRC Summer Institute that Guided Pathways is a means to make a college equitable. As K. M. McClenney wrote in "Guided Pathways to College Completion and Equity" in 2019, "At the heart of the guided pathways reform is a passionate commitment to achieving equity in college access and outcomes for students. As colleges fundamentally redesign students' educational experiences, they assume the professional and moral obligation to ensure that institutional policies and practices are specifically designed to promote equity—and conversely, to eliminate unintentional barriers, unconscious bias, and institutional racism. Ideally, every design decision is made with equity in mind" (qtd. in Bragg et al., "[Integrating Racial Equity into Guided Pathways](#)" 1).

Center for Teaching and Learning

Institutions of higher learning "require multiple teams of cross-unit expertise in order to make progress" (Schroeder 2011, 202). D'Avanzo (2009) identifies the Center for Teaching and Learning (CTL) as one such team, presenting the CTL as a nexus for cross-college communication as well as the refining of assessment and evaluation practices. Investment in a CTL – particularly one invested in the development of instructional technology and/or distance education – can prove a financial boon to institutions (Kelly et. al. 2017). Finally, a CTL grounded in DE&I principles will enable RBC to directly link the goals of Governor Northam's ONE Virginia strategic plan with his mission to make Virginia the most educated state by 2030.

We are requesting:

- \$50,000 to institute the Center for Teaching and Learning, including furniture, technology, and the displacement of other areas due to the CTL's stationing in the College's library.

Life Coaches

Life Coaches will provide tier-1 counseling, life skills, and resilience training grounded in culturally responsive pedagogies and person-first practice cultivated in fields such as social work through mental health skill building.

These positions will fill a desperate need at RBC for student mental health and general wellness support, particularly support that addresses the diverse needs of our multiply diverse student body. Indeed, Abrams (2020) points out that in the wake of COVID-19, colleges and universities will need to invest more heavily in mental health and crisis services with the understanding that the college experience will look and feel very different from the way it did before.

Finally, the addition of a Life Coach position to the Student Success team (and student support services more broadly) serves to differentiate mental health and general wellness support from the work of Learner Mentors as coordinators of students' guided path through RBC including academic advising, career counseling, and transfer counseling.

We are requesting:

- \$162,000 to fund Life Coach positions (\$40,000 salaries with 35% added to account for fringe benefits – \$54,000 total – for three life coaches).

Course Redesign for DE&I

Richard Bland College of William & Mary offers courses in over 30 different areas of academic focus ranging from Art to Theatre, all transferrable to four-year Virginia institutions.

Over 70% of student respondents to the TOCAR survey administered by the Racial Justice & Equity task force agreed or strongly agreed that RBC should offer more courses focused on racial issues, while 63% of student respondents agreed or strongly agreed that all students at RBC should be required to complete at least one course that includes analysis and skills needed for dismantling racism.

Following the Modern Language Association's model for Humanities Innovation Grants – \$3,000 grants that support the development of courses and other educational programs aimed at building enrollments and revitalizing students' interest in the humanities – Richard Bland will offer \$3,000 grants to support faculty development and the offering of courses that address issues of diversity, equity, and inclusion.

We are requesting:

- \$90,000 to provide these faculty grants (\$3,000 per course at one course per area of academic focus, 30 total).

These requests total \$302,000 for the first year. After the establishment of the Center for Teaching and Learning and course re-designs, the requests will be reduced to \$162,000 for subsequent years.

Student Health Program Expansion

Richard Bland College does not have an infirmary and did not have any related health care support prior to the COVID-19 pandemic. As a result of the pandemic and the need to develop health care strategies, RBC entered into an agreement with Virginia Commonwealth University to provide virtual health care for our

rural, first generation, residential community. A VCUHealth physician would virtually meet with a student exhibiting symptoms and develop a treatment plan. This program was a success for the College and was extremely helpful in the management of COVID cases on campus. It was an important strategy for determining isolation and quarantine protocols to keep the community safe. The tele-med health program was expanded in the second semester to include follow up appointments at local VCUHealth clinics.

Student mental health in higher education has been an increasing concern. The pandemic has brought this vulnerable population into renewed focus. The College is requesting funds to expand the program with VCUHealth to include virtual mental health support. Over 90% of college students experience negative mental health symptoms due to the pandemic, according to a recent BestColleges.com survey. Nearly half of students struggle with isolation, anxiety and a lack of focus. Students have also found it difficult to participate in online classes and complete homework. A request of \$125,000 per fiscal year is requested to provide virtual health care.

Student Employment

Student employment has proven to be an effective way for students to earn money and gain valuable experience while becoming more connected with their campus community. In 2020 RBC worked to develop and apply learning outcomes to all campus jobs that help students understand what they will learn on the job and to be able to apply these skills in future employment experiences. We plan to continue to expand student employment opportunities to include additional departments on campus; therefore, additional funding is requested to facilitate this expansion and meet the statewide increase in the minimum wage rate. A request of \$150,000 for student employment is requested.

Requested funds for Student Success strategy: \$2,277,284 (year 1 and 2)

Guided Pathways Implementation

FY22: \$631,642 / FY23: \$631,642 \$ 1,263,284

Diversity, Equity and Inclusion Student Program

FY22: \$302,000 / FY23: \$162,000 \$ 464,000

Health Program Expansion

FY22: \$125,000 / FY23: \$125,000 \$ 250,000

Student Employment

FY22: \$150,000 / FY23: \$150,000 \$ 300,000

**Strategy 3
RBC Online**

Richard Bland College seeks to expand its reach beyond traditionally-aged, on-campus students via RBC Online, a college within a college structure that focuses on program offerings to adult/post-traditional learners, as well as learners who may be geographically removed from RBC’s traditional geographic service area. RBC Online focuses on quality within the areas that adults respond to well, such as teaching excellence, small class sizes, and a dynamic classroom environment with an emphasis on critical thinking

and real-world applications. To support these critical needs, RBC has partnered with a leading online content provider to offer innovative courses that are designed for adult learners with a focus on student engagement through episodic, documentary-style films, many of which focus on individuals from underserved populations. In order to ensure success of this strategic initiative, dedicated staffing focused on these adult and post-traditional, learner-specific programs is crucial.

In the last decade, the post-traditional student/adult learner population has grown dramatically to 13.3 million, over 60% of all undergraduate students. Even while studying online, many students select institutions within their own state because proximity to their institutions increases their sense of involvement and ability to interact with and leverage on-campus resources. According to the U.S. Census Bureau, within the RBC service area, there are over 35,000 educationally and economically stranded adults, those who are between ages 25 and 34 who have attained a high school degree or equivalent but have not earned a bachelor's degree. It can be assumed that a significant percentage of this demographic has not earned an associate's degree.

The RBC Online program must help students overcome the real and significant barriers that are preventing them from going back to school. Finding ways to make programs more accessible, affordable, and focused on career-readiness are critical to success. RBC Online's work with strategic partners is focused on programs that are tied to high-growth career paths and will set students up for success in addition to providing a return on their tuition investment. Additionally, RBC's partnerships, such as Verto Education, makes gap-year international study experiences available to many underserved students across the country. Upon completion of the study abroad program, many students do not have definitive post-secondary education plans. RBC Online offers an opportunity for students to continue their RBC education from anywhere in the country after completing the RBC study abroad experience.

Interweaving RBC's student value proposition, Guided Pathways for Success (GPS@RBC), will be critical for expanding RBC Online. RBC Online-specific admissions and enrollment counselors will focus on goals related to online education such as persistence and completion while continuing to focus, yet broaden, the College's reach to underserved populations.

Requested funds for Student Success strategy: \$1,270,000 (year 1 and 2)

RBC Online Personnel

Associate Director of Online Programs (1)

FY22: \$90,000 / FY23: \$90,000	\$ 180,000
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Faculty Curriculum Developers (3)

FY22: \$285,000 / FY23: \$285,000	\$ 570,000
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Instructional Designer (1)

FY22: \$110,000 / FY23: \$110,000	\$ 220,000
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IT Support Specialist (1)

FY22: \$80,000 / FY23: \$80,000	\$ 160,000
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Admissions support/Enrollment Counselor (1)

FY22: \$70,000 / FY23: \$70,000

\$ 140,000

Strategy 4 Shared Services Consortium

Richard Bland College will implement a shared services consortium to produce new revenue, gain efficiencies, and decrease cost associated with non-core business functions at the College. The shared services consortium development and implementation is broken up in three distinct phases: (1) build infrastructure and revenue capabilities, (2) establish technology and initiate services with pilot college, and (3) expand platform of services and consortium partners. While more detail may be available for Phase I, specifics related to Phase II & III will be developed as we move closer to each respective phase.

Phase I will be focused on designing and implementing the building blocks of the client partner consortium and host college revenue capabilities. Revenue capabilities in Phase I will focus on a collection service offering for the host college and expand to additional consortium colleges/clients as able. Revenue captured in Phase I will be used to help fund staffing and technology capabilities required to implement later phases of this initiative. Opportunities for quick wins identified in Phase I will be provided to the RBC Chief Business Officer for approval and implementation as appropriate.

Phase I deliverables will include:

- Consortium Governance Model
- Key Performance Indicator (KPI) Monthly Reporting
- Service Level Agreements (SLAs)
- Client Marketing Approach.
- Phase II Strategic Roadmap
- Collection Service Offering & Fee Structure

Phase II will be focused on designing and implementing the ERP capabilities and onboarding the host college into the new service model. Services will initially focus on fiscal services and expand to human capital management & facilities as appropriate and approved by the RBC Chief Business Officer. All processes and services will be compliant with state policies and rules as established by the Commonwealth of Virginia and host college. Opportunities for quick wins identified in Phase II will be provided to the RBC Chief Development Officer for approval and implementation as appropriate.

Phase II deliverables will include:

- ERP Implementation & Configuration for Host College
- Fiscal / HCM Services Established
- Key Performance Indicator (KPI) Monthly Reporting
- Service Level Agreements (SLAs)
- Client Marketing Approach.
- Phase III Strategic Roadmap

Phase III will be focused on expanding the ERP client base and services offered to consortium partners. All processes will be compliant with state policies and rules as established by the Commonwealth of Virginia and the host college, and those policies and rules approved by consortium partners within the governance structure. Opportunities for quick wins identified in Phase III will be provided to the RBC Chief Business Officer for approval and implementation as appropriate. Phase III deliverables will be developed with the host college and consortium partners as appropriate and able.

Director of Shared Services

Develops and manages the client partner consortium and establishes the revenue capabilities. Revenue capabilities in Phase I will focus on a collection service offering for the host college and expand to additional consortium colleges/clients as able. Revenue captured in Phase I will be used to help fund staffing and technology capabilities required to implement later phases of this initiative. Opportunities for quick wins identified in Phase I will be provided to the RBC Chief Business Officer for approval and implementation as appropriate.

Requested funds for shared services: \$400,000 (year 1 and 2)

FY22: \$125,000 / FY23: \$125,000 \$ 250,000

FY22: \$75,000 / FY23: \$75,000 \$ 150,000

Section C. In-state Undergraduate Tuition and Fee Increase Plans: Provide information about the assumptions used to develop tuition and fee information the institution provided in the Excel workbook Part 1. **The tuition and fee charges for in-state undergraduate students should reflect the institution's estimate of reasonable and necessary charges to students based on the institution's mission, market capacity and other factors.**

RESPONSE:

Given the additional funds allocated by the General Assembly in the FY 22 budget, and the current political environment, annual tuition is not expected to increase more than 3%-5% for each year of the next biennium. Of course, such expectations depend on the level of state funding received for key initiatives and maintenance of current services at the level of quality necessary for sustainability. This represents approximately \$8 per credit hour at 3% and approximately \$10 per credit hour at 5%. Furthermore, RBC intends to revisit the distribution of student charges between tuition and mandatory fees to more appropriately align between Educational & General fund and Auxiliary uses.

Section D. Tuition and Other Nongeneral Fund (NGF) Revenue: Provide information about factors that went into the calculations of projected revenue, including how stimulus funds may mitigate tuition increases.

RESPONSE:

Richard Bland College projects revenue based on the current and anticipated future economic and political environment. In considering a post-pandemic environment, the College projects a moderate rebound in enrollment for the Fall 2021 and will continue to use stimulus funds, while available and provided, to mitigate lost revenue and to discharge student debt.

Section E. Other Budget Items: This section includes any other budget items for which the institution wishes to provide detail. Descriptions of each of these items should be one-half page or less.

RESPONSE:

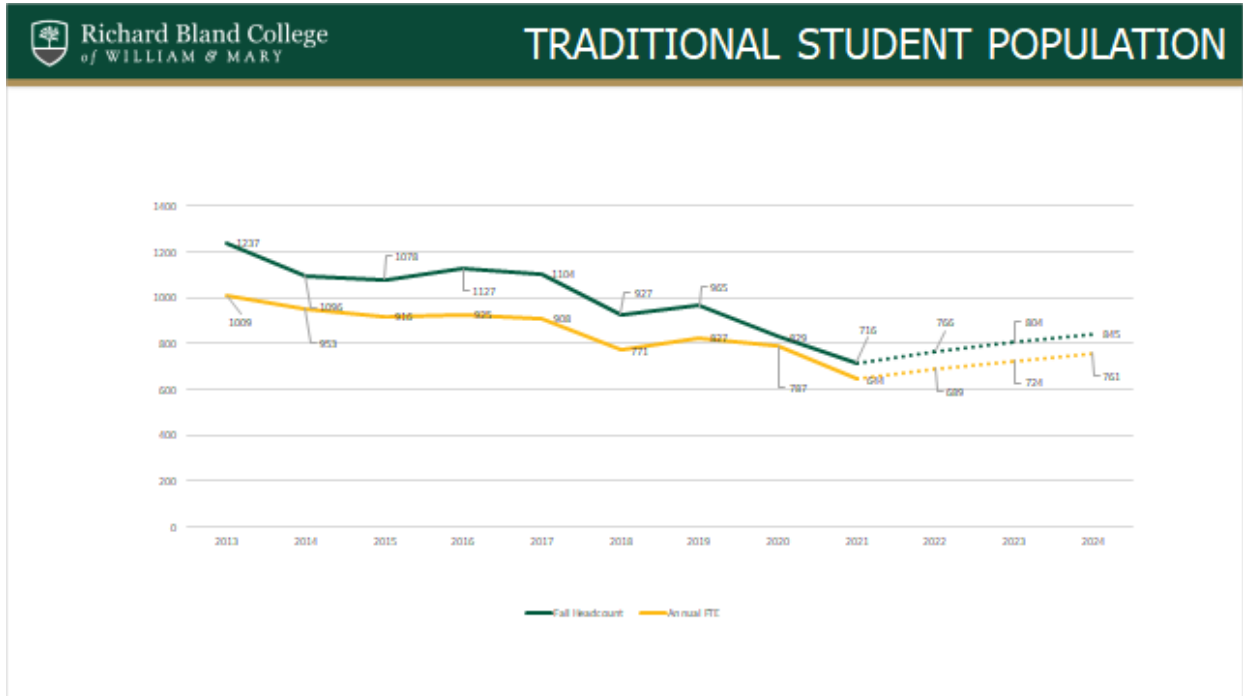
Richard Bland College has no additional budget items to add.

Section F. Enrollment Projections: Include in this section information about how your institution developed its enrollment projections, whether your institution is concerned about future enrollment trends,

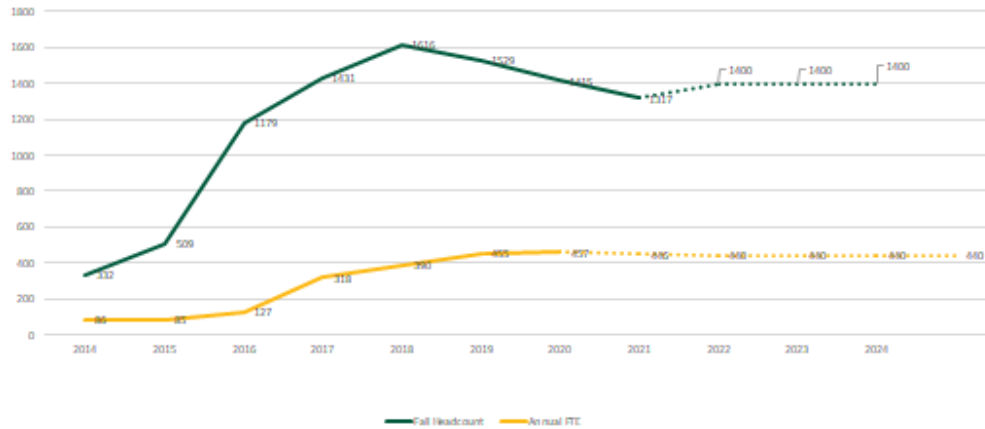
and, if so, what planning is underway to address this concern. How have enrollment plans been impacted by the pandemic? For example, does your institution plan on enrolling more online students?

RESPONSE:

Richard Bland College has had some difficulties in making enrollment projections historically; therefore, we have remained relatively conservative with our enrollment projections. We experienced a 25% decrease in our traditional-aged core population.



We anticipate that post COVID-19 and with our return to almost normal operations in the fall 2021, that we can rebound from this trough and realize a three to five percent (3-5%) increase in this population of students over the next few years. We expect to maintain Dual Enrollment populations at current levels.



We also have two new populations of students included in our enrollment projections. Verto Education is a study abroad program that enables students to take RBC classes at various sites around the world. In the Fall 2020 (online due to COVID-19) we realized an enrollment of 180 students in Verto. For Fall 2021, it is projected that 800 students will enroll in these study trips and this trend should continue to grow to 1,000 enrolled students by 2023. We have also grown our number of online offerings and programming. In addition, RBC has recently initiated an effort to market “online only” classes to post-traditional student populations (over the age of 24) and a modest enrollment increase is expected.

Section G. Programs and Instructional Sites: Provide information on any new academic programs, including credentials and certificates, new instructional sites, new schools, or mergers supported by all types of funding, that the institutions will be undertaking during the six-year period. Note that as part of the revised SCHEV program approval process, institutions will be asked to indicate if a proposed new program was included in its six-year plan. Also, provide information on plans to discontinue any programs.

RESPONSE:

Richard Bland College is working on multiple new programs to advance the mission and vision outlined in our Strategic Plan, [Seize Your Potential](#), and to increase accessibility to the College, consistent with the Virginia Plan for Higher Education. RBC was recently approved to add an instructional site at Rock Ridge High School in Loudoun County Virginia. This site is strictly for dual enrollment because RBC offers 49% of its degree program to students as dual enrollment. In a new, similar agreement with Hopewell City School Division, RBC will be seeking to add an additional instructional site at Hopewell High School and establish an Early College.

RBC is also seeking site approval for the various locations associated with the study abroad partnership with Verto Education. The current locations for these study trips are Costa Rica, Hawaii, South Pacific, England, Italy and Spain. As the volume is expected to increase, the number of course offerings will also increase and require additional sites for RBC. We expect to reach the SACSCOC threshold of 49% in Costa Rica in 2022 and various other locations by 2023.

RBC is also working with the Commonwealth Center for Advanced Manufacturing (CCAM) and GO Virginia to create the Federation of Advanced Manufacturing Education Academy of Central Virginia. This program is industry leading with nine local manufacturers who will hire students to work three days a week and attend RBC two days a week. Students will graduate as Advance Manufacturing Technicians with options to enter the workforce or pursue transfer in multiple pathways. RBC will be seeking to create a new Associate of Science in Automation for Manufacturing Technology degree for this program and a new site location at CCAM.

RBC is not seeking additional state support for these programs.

Section H. Financial Aid: Discuss plans for providing financial aid, not including stimulus funds, to help mitigate the impact of tuition and fee increases on low-income and middle-income students and their families, including the projected mix of grants and loans. Virginia's definitions of low-income and middle-income are based on HHS Poverty Guidelines. A table that outlines the HHS guidelines and the definitions is attached.

RESPONSE:

RBC provides financial help to students for whom the rising cost of education is particularly challenging. This financial aid comes in the form of institutional, state, endowment and federal funding to help low and middle-income families afford college. RBC uses unfunded scholarships (e.g., Statesmen Scholars) to assist more students with bridging the gap.

RBC awards financial aid based on the U.S. Department of Education Federal Methodology (FM) formula in calculating a student's Expected Family Contribution (EFC). The EFC determines a student's eligibility for financial aid. The FM formula is used in all of RBC's financial aid packages, including institutional, state, and federal funding. This formula takes into consideration the student's household size, number in college, Adjusted Gross Income, etc., to determine the amount of financial aid to award.

Awarding criteria focus on the neediest of students who are awarded the highest overall financial aid offer. This financial aid offer generally includes state, institutional and federal dollars.

RBC's definition of middle-income and low-income within the financial aid plan is as follows:

- A. Low Income Students in 2019-20 (In-State): Definition = Expected Family Contribution (EFC) of \$0 - \$5,486 (Pell Grant eligible students)
- B. Middle Income Students in 2019-20 (In-State): Definition = Expected Family Contribution (EFC) of \$5,487 - \$16,000

For 2019-2020, the EFC cut-off for awarding Virginia Student Financial Assistance Program (VSFAP) and college grants and waivers to on-time, in-state, financial aid filers is \$16,000. RBC's goal for the future is to continue awarding student financial aid at this trajectory to further increase enrollment and improve retention rates. In order to achieve this, the College is asking for an additional \$500,000 to add incremental awards to further decrease the cost of education for our high-need student population. In addition, and as outlined in Section A, Strategy 4, the College is requesting \$150,000 to be used for expanded institutional work study to pilot the work-curriculum initiative.

Section I. Capital Outlay: Discuss the impact, if any, that the pandemic has had on capital planning, such as decreasing the need for space or other aspects. Provide information on your institution's main Education and General Programs capital outlay projects, including new construction as well as renovations that might

be proposed over the Six-Year Plan period that could have a significant impact on strategies, funding, student charges, or current square footage. Do not include projects for which construction (not planning) funding has been appropriated. *Special Note: The requested information is for discussion purposes only and inclusion of this information in the plans does not signify approval of the projects.*

RESPONSE:

The 2022-2028 Capital Plan was developed and informed by application of the 2014 Campus Facilities master Plan, which itself reflects the thorough and robust review of programs, facilities, infrastructure, adaptability, replacement and highest and best use as determined by RBC faculty and staff in collaboration with a professional architectural firm. The 2022-2028 Capital Plan was approved by the William and Mary Board of Visitors in February 2014.

Biennium 2022-2024 will be the focus of potential action by the 2022 legislature, and thus reflects the priorities of the College as well as the success of initiatives that were funded by the 2020-2021 General Assembly.

The College expects to make submittals on the 2022-2028 Capital Outlay Plan to the Department of Education (DOE), the Department of Planning and Budget (DPB), the Department of Treasury (TRS), and the State Council of Higher Education (SCHEV) through September 2021. In the course of that process, College staff will develop and refine project budgets, which may adjust the estimates reflected in this plan.

The impact of the COVID-19 pandemic on RBC's capital planning has been substantial, both negatively and positively. Consistent with many colleges and universities in the Commonwealth, RBC experienced enrollment declines throughout the academic year. As faculty were required to teach classes online instead of in person, additional space for producing online classes became necessary. There were limited resources, to include space, for computer labs and science labs resulting in the need for additional space to accommodate the same number of students. Student events and activities were cancelled due to inadequate space for functions. Due to old and inefficient mechanical systems, concerns related to adequate filtered air surfaced and many student services, normally provided to the community, were compromised.

On the positive side, RBC sees opportunities to improve services and, thereby, student outcomes, as a result of lessons learned during the pandemic. By making several strategic shifts in space use, RBC can initiate changes that otherwise would not have occurred for many years. For example, in the most recent General Assembly session, the College received Education and General program funds to transition a small residential building (70 beds) that was designated for use as a quarantine and isolation facility during the pandemic to an admissions and student service center. In doing so, the RBC will be able to offer all of the traditional student service functions associated with admissions, registration, and financial aid in a single location. This "one-stop shop" configuration will streamline the new student's experience, making it easier and more convenient to pay tuition and fees and enroll in classes. Colleges have found a greater number of prospective student follow through and enroll resulting in higher retention rates. Additional funds are not being requested for this project.

The pandemic accelerated the adoptions of new technologies and pedagogies and the need for additional academic support spaces. The following capital requests allow RBC to take advantage of freed up spaces to offer an exciting new student development initiative and consolidate administrative functions to one location. These minor shifts in space functions will result in significant improvements to the College functions and student outcomes. The request includes:

Center for Experiential Learning and Student Success (CELSS)

Current spaces are inadequate for robust career and student success programming. The Center for Experiential Learning and Student Success (CELSS) will be housed in Pecan Hall once the offices of Admission, Financial Aid and Human Resources transition to Commerce Hall. The addition and renovation to Pecan Hall will allow RBC to consolidate and increase student programming that better prepares students for the world of work and/or upper level college or university coursework. Development of the CELSS program is an outgrowth of an analysis of the most recent RBC student demographics, graduation rates, and offerings that have proven effective for student engagement and retention.

The CELSS programs will enhance student success through preparation of students for the world of work and/or transition to senior level higher education institutions. Given the changes in the workplace as a result of the pandemic and new workplace environments resulting from increased inclusion of technology, artificial intelligence and workflow systems, students need more than traditional academic and student development services. The CELSS programs will complement traditional student development through programs such as mentoring (with professionals in a chosen field, with an emphasis on RBC alumni), tutoring, career planning, internships (cultivated with local businesses), service learning, leadership training (including development of a stronger and broader student government component), and simulated workplace tasks/experiences. Housed in a single location, Pecan Hall, the CELSS will allow the College to offer a comprehensive student focused program that will result in graduates who are better prepared for their future. Specific spaces and/or activities to be housed in Pecan Hall include:

- Career Services Center
- Mentoring Center
- Social resources office to provide students with assistance related to food insecurity and related social and financial challenges.
- Honors program
- Tutoring Center
- Flex space for simulated work experience/simulations
- Student Clubs/Organizations
- Social Justice Center in support of diversity, equity and inclusion
- Student Conduct Review Board
- Study rooms/areas
- Collaboration spaces
- Multi-purpose room for student centric activities
- Conference and Meeting rooms

Through the initial work of RRMM Architects, PC, it is estimated that the cost to renovate and add an additional 3,000 square feet (10,273 total square feet @ \$285.99/sq ft) is \$2,938,219.

Maze Hall Renovation:

As a small campus that has evolved and grown since its founding, numerous spaces were created out of necessity and availability of space, without regard to a preferred size or location. This century has seen a gradual shift in pedagogy practices as a result of advances in technology and an emphasis on an active learner. The advent of the COVID-19 pandemic accelerated changes in academic delivery methods with an increased emphasis on online learning, hybrid classes and other forms of student engagement. Full return to a traditional academic schedule and lecture format is unlikely. With students returning to campus, there is an increased need for collaboration spaces, study spaces, hybrid learning environments, and

academic content development areas. The library, academic classrooms, science labs and other instructional labs and spaces are clustered on the west campus.

Renovation of Maze Hall provides several benefits to the RBC.

A recent Facility Assessment found Maze Hall, built in 1935, in need of façade repairs to stop water infiltration to the basement and other areas, updates to meet various code and ADA deficiencies, and mechanical system upgrades to improve make up air, ventilation and filtering. A complete renovation will allow all building systems (except roof and windows) to be upgraded to provide state-of-the-art assets found in the new and recently renovated buildings on the academic (west) side of the campus.

Movement of student related functions out of Maze Hall to the adjacent Commerce Hall building will provide space to move executive level administrators from multiple buildings and create an administrative core space. The continued success of RBC has amplified the need for more administrative personnel, which in turn requires additional spaces. Co-locating these administrative offices in a single building will improve work efficiencies and create a more synergistic environment for the benefit of the College. Renovation of Maze Hall will allow design of the administrative core spaces to reflect contemporary leadership and management practices and office work environments. In addition, it will allow RBC to take advantage of an integrated technology environment that supports both individuals and groups.

Through the initial work of RRMM Architects, PC, it is estimated that the cost to renovate Maze Hall (9,946@ \$180 sq/ft) is \$1,793,439.

Requested funds for Center for Experiential Learning and Maze Hall: \$5,914,571

Center for Experiential Learning

FY22: \$3,672,773 (includes 15% general conditions and 10% market factor)

Maze Hall Renovation

FY 22: \$2,241,798 (includes 15% general conditions and 10% market factor)

Section J. Restructuring: Provide information about any plans your institution has to seek an increased level of authority, relief from administrative or operational requirements, or renegotiation of existing management agreements.

RESPONSE:

It is the intent of Richard Bland College to pursue Tier 2 status to relieve the institution of the burden of resources necessary to comply with restrictions in Information Technology and Procurement functions that come with the designation of Tier 1.

Section K. Evaluation of Previous Six-Year Plan: Briefly summarize progress made in strategies identified in your institution's previous six-year plan. Note how additional general fund support and reallocations were used to further the strategies.

RESPONSE:

The Commonwealth of Virginia has defined a vision to be the "Best State for Education," with an overall target of 70% educational attainment of all 25 to 64-year old working aged Virginians. To achieve this, three goals are defined as part of the framework for identifying key areas of focus:

Equitable – close access and completion gaps by removing barriers to access and attainment especially for Black, Hispanic, Native American and rural students.

Affordable – lower costs to students, through investing in and supporting the development of initiatives that provide cost savings to students while maintaining the effectiveness of instruction.

Transformative – Expanding prosperity through increased social, cultural and economic well-being of individuals and communities within the Commonwealth and its regions.

Richard Bland College is positioned well to support this effort. The College's innovative program (ESE@RBC) has been used to remove barriers to education and is established, but new, student-centric strategies based on comprehensive guided pathways reforms can improve outcomes around degree completion, student retention, workforce readiness, equity, and time-to-degree (including affordability and transferability of credits in a major), among others.

Research and data collection done in support of our current strategic planning cycle strongly suggests that RBC should evolve ESE@RBC into a fully implemented guided pathways framework as it provides a well-defined **student value proposition** (*i.e.*, a measurable return on the student's investment in college). This framework is composed of:

- easy to navigate onboarding;
- clearly defined pathways that outline workforce-friendly majors and credentials, and effective processes for entering a pathway;
- a work-integrated curriculum focusing on required soft skills;
- fast track programs that enable academically underprepared students to achieve, in a timely manner, expected learning outcomes in crucial English and math courses;
- high-touch, intensive, student-centric support across the college; and
- tools for faculty, staff and students that provide useful information about assessment and progress

The design and implementation of this comprehensive program, **Guided Pathways for Success at Richard Bland College** (*GPS@RBC*), is the primary focal point of the future-sighted strategic plan of the College.

This is an initiative that redesigns the entire College to improve the educational experience for every student, from admission through graduation, and deliberately aligns faculty and staff around a clear, laser-focused purpose. The primary directives involve reforms in advising and registration processes to help all students identify realistic and relevant goals as early as possible in their academic career. Well-defined and easy to follow program maps are developed to meticulously guide students in each program through the academic journey with the primary objective of avoiding as much wasted time as possible resulting in a cost savings for the student.

There is also a strong focus on how students are supported, monitored and tracked throughout their courses of study. The program's focus is a full redesign of academic programs, student services, administrative services, recreational services, and all other services that touch the student in order to meet their needs. The objective is to end the confusion that is created through acronym-filled lingo and ambiguous, bureaucratic processes.

Finally, alignment with local and other high-need labor markets is a major principle, ensuring that value exists as students leave with a defined credential and the skills to succeed in a rapidly changing workforce.

The Richard Bland College Student Value Proposition consists of two primary elements. These are defined as our strategic goals:

Strategic Goal: An educational product of high-value with streamlined pathways

Richard Bland College will provide access to educational programs that are streamlined and well-defined, thereby allowing learners to proceed deliberately and efficiently. These programs will be carefully vetted for transferability, academic rigor and relevance to the current market. They will provide unique experiences, including opportunities for research, internships and work experiences that cultivate in-demand technical and soft skills.

Strategic Goal: An unmatched student experience

Richard Bland College will provide a student-centric experience unlike any other in the Commonwealth of Virginia. Support and guidance at every stage of the student lifecycle will be provided enthusiastically with processes and procedures that are user-friendly. We will remove barriers. Through this focused service, RBC will ensure that learners have a clear path to graduation, transfer and beyond. When students reflect back on their time at RBC, the only acceptable memory will be how amazing the experience was and how it helped them to reach their potential.

In order to execute our core mission and provide a unique **student value proposition**, resources are required to fund and support the operations and infrastructure of the college. The Richard Bland Core Promise states that:

All employees and students will support the success of our learning community by aggressively pursuing fiscal stability, operational efficiency and a culture of excellence and innovation.

Strategic Goal: Sustainability in operation

Higher education costs are increasing, and unfunded mandates are multiplying while state funds and the number of high school graduates continue to decline. This results in a dependency on tuition and auxiliary revenue to cover expenses. To prevent unduly shifting the financial burden to students, RBC is committed to identifying alternative funding streams, improving internal financial management tools, and using all available resources in a sustainable and responsible manner.

To ensure a more robust endowment, philanthropic giving and alumni engagement will be invigorated with a focus on student success. Current trends in fundraising highlight interest in one-to-one giving, making appeals for more and varied scholarships a smart strategy. Leveraging the gift of alumni time and talent for program development, internship support, and job placement builds relationships and creates support systems beyond financial gifts. To ensure clarity of goals, targeted giving and legacy campaigns will be established.

RBC has ample opportunity to innovate internally. Automating systems will free up staff to manage more strategically important challenges. Expansion of data dashboards that are transparent and adaptable will clarify expectations and push accountability to drive continuous improvement.

Making the most of every available resource is paramount. We will pursue initiatives in environmental sustainability and recycling. Lower operating costs result in more funds that can be applied to the student value proposition.

These are the tenets that will drive the resource engine at RBC.

Section L. Diversity, Equity and Inclusion (DEI) Strategic Plan: Provide an update on the completion status of your institution's plan that is being coordinated with the Governor's Director of Diversity, Equity and Inclusion. If a copy of the plan is available, please include it when your institution submits its initial plan. If a copy of the plan is not available for July 1 or if changes are made, please provide a copy with your institution's final plan submission on October 1.

RESPONSE:

Richard Bland College of William & Mary's Diversity, Equity, and Inclusion Plan emerges from the work of its Racial Justice & Equity task force. President Sydow convened the task force in June 2020, to actively identify, confront, and alleviate racism and discrimination at RBC. Three questions, grounded in the College's stated values, guided the work of the task force (and, indeed, forms the foundation of its DEI plan):

1. How have equity and inclusion been fostered in the structures, systems, policies, and procedures within and across departments at RBC?
2. If nurturing students' potential demonstrates enthusiastic, student-focused service, how are retention and achievement of students of color impacted on RBC's richly diverse campus, one in which a disproportionate number of employees represent their race and culture?
3. What are the appropriate steps required to build an anti-racist learning and working environment in which equity and inclusion serve as core values that inform and inspire RBC's transformation into a multi-cultural, student-centric, and family-friendly campus?

These questions established the tenor for RBC's racial justice work while adumbrating conditions for enabling campus community members to become cross-cultural allies. They also encouraged the task force's development of an explorative protocol that began with the collection of data from each of the campus' functional units through the validated Teaching Our Campus Anti-Racism (TOCAR) instrument. Task force members collected survey data, held listening sessions, and conducted programming to engage employees and students in fostering inclusion on campus. The task force co-chairs detailed these initiatives in fall and spring semester progress reports. In collaboration with the Office of Communications, the task force promoted its work to the community through its interim reports and on the College's website.

The task force's June 2021 final report contextualizes the body's work in the history of the College, summarizes its operations, and provides recommendations that address the charges provided by President Sydow. The report also delineates an assessment plan to ensure RBC's overall conformation with its articulated anti-racist, multicultural identity and the progress of the faculty, staff, and administration toward the continuous manifestation of this identity.

Section M. Economic Development Annual Report: Provide a copy of any report your institution has produced about its economic development contributions.

RESPONSE:

Richard Bland College of William & Mary is located in the Petersburg community, and more than 90% of its student body resides in the tri-cities region (Petersburg, Hopewell and Colonial Heights). The city of Petersburg has one of the highest unemployment rates, the lowest health ranking, and one of the poorest performing school systems in the Commonwealth. All Petersburg students (100%) qualify for the free lunch program. The City has been financially unstable and deeply in debt for more than a decade. The median household income is approximately \$33,000. The largest industries are health care and social assistance. With Petersburg as the center city for the region, bordering localities (excluding Chesterfield County) are experiencing economic depression.

RBC is an important economic driver for the region. A Weldon Cooper Center report estimates the following RBC expenditures in FY17:

- Employment Effect – 255 positions;

- \$14M State GDP & \$1M State Revenues, and
- Human Capital Improvements Value - \$7M GDP and \$1M State Tax Revenue.

RBC's total economic contribution equals \$21 million in GDP and State Tax revenues.