

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

**Due: July 1, 2022**

**Institution:**

University of Mary Washington
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**Institution UNITID:**

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**Individual responsible for plan**

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**Part 1: In-State Undergraduate Tuition and Mandatory Fee Increase Plans in 2022-24 Biennium**  
**University of Mary Washington**

**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
\$8,678	\$8,852	2.0%	\$9,030	2.0%

**In-State Undergraduate Tuition and Mandatory E&G Fees**

2022-23 (Revised)		2023-24 (Revised)	
Planned Charge	% Increase	Planned Charge	% Increase
\$8,938	3.0%	\$9,206	3.0%

**In-State Undergraduate Mandatory Non-E&G Fees**

2021-22	2022-23		2023-24	
Charge (BOV approved)	Planned Charge	% Increase	Planned Charge	% Increase
\$5,092	\$5,194	2.0%	\$5,298	2.0%

**In-State Undergraduate Mandatory Non-E&G Fees**

2022-23 (Revised)		2023-24 (Revised)	
Planned Charge	% Increase	Planned Charge	% Increase
\$5,296	4.0%	\$5,454	3.0%

**Part 2: Tuition and Other Nongeneral Fund (NGF) Revenue  
University of Mary Washington**

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. DO NOT INCLUDE STIMULUS FUNDS.

**Revised**

Items	2020-2021 (Actual)	2021-2022 (Estimated)	2022-2023 (Planned)	2023-2024 (Planned)	2021-22 (Est.)	2022-23 (Est.)	2023-24 (Planned)
	Total Collected Tuition Revenue	Total Collected Tuition Revenue	Total Projected Tuition Revenue	Total Projected Tuition Revenue	Total Tuition Revenue	Total Tuition Revenue	Total Tuition Revenue
<b>E&amp;G Programs</b>							
Undergraduate, In-State	\$29,649,400	\$28,554,400	\$28,834,000	\$29,940,000	\$25,985,700	\$26,455,000	\$27,250,000
Undergraduate, Out-of-State	\$8,293,300	\$7,933,300	\$8,011,000	\$8,318,000	\$8,448,000	\$8,598,000	\$8,856,000
Graduate, In-State	\$2,445,000	\$2,195,000	\$2,217,000	\$2,302,000	\$2,386,000	\$2,458,000	\$2,531,000
Graduate, Out-of-State	\$420,000	\$353,000	\$356,000	\$370,000	\$288,000	\$295,000	\$305,000
Law, In-State	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Law, Out-of-State	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Medicine, In-State	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Medicine, Out-of-State	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Dentistry, In-State	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Dentistry, Out-of-State	\$0	\$0	\$0	\$0	\$0	\$0	\$0
PharmD, In-State	\$0	\$0	\$0	\$0	\$0	\$0	\$0
PharmD, Out-of-State	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Veterinary Medicine, In-State	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Veterinary Medicine, Out-of-State	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other NGF	\$1,435,000	\$1,485,000	\$1,485,000	\$1,485,000	\$1,787,000	\$1,808,000	\$1,829,000
<b>Total E&amp;G Revenue</b>	<b>\$42,242,700</b>	<b>\$40,520,700</b>	<b>\$40,903,000</b>	<b>\$42,415,000</b>	<b>\$38,894,700</b>	<b>\$39,614,000</b>	<b>\$40,771,000</b>

Non-E&G Fee Revenue	2020-2021 (Actual)	2021-2022 (Est)	2022-2023 (Planned)	2023-2024 (Planned)	2021-22 (Est.)	2022-23 (Est.)	2023-24 (Planned)
	Total Fee Revenue	Total Fee Revenue	Total Fee Revenue	Total Fee Revenue	Total Fee Revenue	Total Fee Revenue	Total Fee Revenue
In-State undergraduates	\$15,960,000	\$15,960,000	\$16,116,000	\$16,735,000	\$15,129,000	\$15,590,000	\$16,300,000
All Other students	\$2,359,000	\$2,359,000	\$2,382,000	\$2,473,000	\$2,423,000	\$2,470,000	\$2,585,000
<b>Total non-E&amp;G fee revenue</b>	<b>\$18,319,000</b>	<b>\$18,319,000</b>	<b>\$18,498,000</b>	<b>\$19,208,000</b>	<b>\$17,552,000</b>	<b>\$18,060,000</b>	<b>\$18,885,000</b>
<b>Total Auxiliary Revenue</b>	<b>\$28,870,000</b>	<b>\$39,318,000</b>	<b>\$41,310,000</b>	<b>\$43,816,000</b>	<b>\$42,202,000</b>	<b>\$43,642,000</b>	<b>\$45,185,000</b>



**Part 4: General Fund (GF) Request  
University of Mary Washington**

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 its 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		2022-2023 (Revised)		2023-2024 (Revised)		
			Total Amount	GF Support	Total Amount	GF Support	Total Amount	GF Support	Total Amount	GF Support	
1	Program in Civil Discourse and Debate	1,2,3	\$0	\$0	\$0	\$0			\$525,000	\$525,000	New initiative for the 2022 6 yr plan update
2	Access to internship opportunities for all students		\$0	\$0	\$0	\$0			\$370,000	\$370,000	New initiative for the 2022 6 yr plan update
3	Enhance the Office of Diversity, Equity & Inclusion	1,2,3	\$580,000	\$580,000	\$580,000	\$580,000			\$580,000	\$580,000	Fully funds strategy through new GF support
4	Enhance support for students, faculty and staff with disabilities	1,2,3	\$480,000	\$480,000	\$480,000	\$480,000			\$0	\$0	2022-24 state budget request fully funded. No additional funding needed at this time.
5	Increase retention efforts for specific student sub-populations	1,2,3	\$210,000	\$210,000	\$210,000	\$210,000			\$210,000	\$210,000	Fully funds strategy through new GF support
6	Establish funding pool for competitive salary adjustments and counter-offers	1,3	\$75,000	\$75,000	\$150,000	\$150,000			\$75,000	\$75,000	Fully funds strategy through new GF support
7	Develop and implement a life-design curriculum	1,2,3	\$260,000	\$260,000	\$260,000	\$260,000					UMW will reallocate funds beginning in FY25 to support this initiative.
8	Establish an Office of Transfer Student Services	1,2,3	\$357,100	\$357,100	\$317,100	\$317,100			\$357,100	\$357,100	Fully funds strategy through new GF support
9	Expand development of Open Education Resources (OER)		\$50,000	\$50,000	\$50,000	\$50,000			\$50,000	\$50,000	Fully funds strategy through new GF support
10	Refresh classroom and information technology infrastructure	1,2	\$160,000	\$160,000	\$160,000	\$160,000			\$160,000	\$160,000	Fully funds strategy through new GF support and one-time HEERF monies
11	Streamline information systems	1,2	\$4,833,000	\$4,833,000	\$4,833,000	\$4,833,000			\$4,833,000	\$4,833,000	Fully funds strategy through new GF support
12	Expand adult degree completion and continuing education programs	1,2,3	\$190,000	\$190,000	\$190,000	\$190,000			\$190,000	\$190,000	Fully funds strategy through new GF support and operational efficiencies
13	Additional funding support for Belmont and the James Monroe Museum	N/A	\$500,000	\$500,000	\$500,000	\$500,000			\$0	\$0	2022-24 state budget request fully funded. No additional funding needed at this time.
			\$7,695,100	\$7,695,100	\$7,730,100	\$7,730,100	\$0	\$0	\$7,350,100	\$7,350,100	

## Part 5: Financial Aid Plan

### University of Mary Washington

**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**

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	\$29,649,400	\$6,120,000	20.6%	\$6,120,000	\$0	\$481,000	\$30,130,400
Undergraduate, Out-of-State	\$8,293,300	\$2,657,000	32.0%	\$2,657,000	\$0	\$598,000	\$8,891,300
Graduate, In-State	\$2,445,000	\$179,000	7.3%	\$179,000	\$0	\$91,000	\$2,536,000
Graduate, Out-of-State	\$420,000	\$26,000	6.2%	\$26,000	\$0	\$67,000	\$487,000
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0
<b>Total</b>	<b>\$40,807,700</b>	<b>\$8,982,000</b>	<b>22.0%</b>	<b>\$8,982,000</b>	<b>\$0</b>	<b>\$1,237,000</b>	<b>\$42,044,700</b>

**2021-22 (Estimated)**

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	\$28,554,400	\$6,133,000	21.5%	\$6,133,000	\$0	\$481,000	\$29,035,400
Undergraduate, Out-of-State	\$7,933,300	\$2,662,000	33.6%	\$2,662,000	\$0	\$598,000	\$8,531,300
Graduate, In-State	\$2,195,000	\$179,000	8.2%	\$179,000	\$0	\$91,000	\$2,286,000
Graduate, Out-of-State	\$353,000	\$26,000	7.4%	\$26,000	\$0	\$67,000	\$420,000
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0
<b>Total</b>	<b>\$39,035,700</b>	<b>\$9,000,000</b>	<b>23.1%</b>	<b>\$9,000,000</b>	<b>\$0</b>	<b>\$1,237,000</b>	<b>\$40,272,700</b>

2022-23 (Planned)							
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	\$28,834,000	\$6,133,000	21.3%	\$6,133,000	\$0	\$481,000	\$29,315,000
Undergraduate, Out-of-State	\$8,011,000	\$2,662,000	33.2%	\$2,662,000	\$0	\$598,000	\$8,609,000
Graduate, In-State	\$2,217,000	\$179,000	8.1%	\$179,000	\$0	\$91,000	\$2,308,000
Graduate, Out-of-State	\$356,000	\$26,000	7.3%	\$26,000	\$0	\$67,000	\$423,000
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0
Total	\$39,418,000	\$9,000,000	22.8%	\$9,000,000	\$0	\$1,237,000	\$40,655,000

2023-24 (Planned)							
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	\$29,940,000	\$6,133,000	20.5%	\$6,133,000	\$0	\$481,000	\$30,421,000
Undergraduate, Out-of-State	\$8,318,000	\$2,662,000	32.0%	\$2,662,000	\$0	\$598,000	\$8,916,000
Graduate, In-State	\$2,302,000	\$179,000	7.8%	\$179,000	\$0	\$91,000	\$2,393,000
Graduate, Out-of-State	\$370,000	\$26,000	7.0%	\$26,000	\$0	\$67,000	\$437,000
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0
Total	\$40,930,000	\$9,000,000	22.0%	\$9,000,000	\$0	\$1,237,000	\$42,167,000

*\* 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.*

## UMW Six-Year Plan Initiative Update

1. **Program in Civil Discourse and Debate:** *UMW seeks to build upon its history of success and leadership in intercollegiate debate and in teacher preparation by creating a university-wide and interdisciplinary program consisting of curricular and extra/co-curricular components that prepares individuals to engage in civil discourse through the exchange of ideas from different perspectives. This program would house curricular components for undergraduates, faculty development support to bring debate skills to the classroom, training for students, faculty and staff to have conversations across diverse viewpoints, as well as programming and student activities on campus and throughout the UMW community such as open forums, debates, and critical discussions. The program would also be responsible for partnering with the College of Education to develop a certificate/endorsement in debate and civil discourse for future teachers to grow capacity to introduce and develop these essential skills K-12 classrooms.*

*Note: This is a new initiative for the 2022 Six-Year Plan Update.*

2. **Access to Internship Opportunities for All Students:** *UMW seeks to create an internship program that will provide any student who seeks an internship, an opportunity to complete one. This will require staff professionals who will be responsible for developing internship arrangements with employers and organizations around the Commonwealth and managing the student recruitment, application, and selection process. It will also require providing students with demonstrated financial need the resources to take advantage of these opportunities in the form of modest internship grants.*

*Note: This is a new initiative for the 2022 Six-Year Plan Update.*

3. **Enhance the Office for Diversity, Equity and Inclusion:** *UMW's obligation to implement ONE Virginia have identified a number of critical needs. First, and foremost, the University needs to recruit additional personnel to support the successful implementation of the inclusive excellence framework across campus. Second, and equally important, it will be necessary to provide additional resources to support the education, training, and programming necessary to move the university forward on issues of diversity, equity, and inclusion.*

*The University has reorganized this office to include compliance (Title IX and ADA) and has hired an Associate Provost to provide oversight and management of these critical areas and the Office of Disability Resources.*

4. **Enhance support for students, faculty and staff with disabilities:** *Given the large population of students with disabilities enrolled at UMW (more than twice that of many other public institutions in the Commonwealth) there is continued emphasis on the need for resources to specifically support the disabled population. Size and mission make UMW a popular recommendation among school counselors seeking to find a good fit for students with disabilities. The completed renovation of Seacobeck Hall (reopening January 2022) with the new expanded offices for the Office of Disability Resources and a*



testing center will further drive this distinctive strength. As a result, the University is especially challenged in meeting student needs ranging from fully accessible classrooms/furniture (in buildings that have not been renovated in the past decade), assistive technologies, learning resources and supports, and appropriate advising/counseling resources (at UMW, the staff to student ratio is twice the recognized standard). This includes ongoing demand for up-to-date assistive technologies, accessible instructional design, and accessible physical environments on campus, as well as new demands for accessible digital environments and access advising/counseling to support mental health and well-being. In addition, meeting the needs of a more diverse faculty/staff includes providing the appropriate accommodations to ensure a fully accessible workplace environment. This can include providing specialized furniture for employees with mobility challenges, assistive technologies on computing and other devices for employees with physical impairments, and retrofitting offices. It also includes support for faculty, staff, and students includes providing software to allow for the creation of accessible electronic documents and the ability to provide closed captioned and audio described video content, as well as additional staffing to support university-wide needs for disabled faculty, staff, students, and guests of UMW.

*The university's 2022-23 operating budget includes additional state funding of \$480,000, which will be committed to meeting staffing and operational needs in the Office of Disability Resources. One such need is to staff the opening of a testing center which was created as part of the Seacobeck Hall renovation. Another need which is being met is to support the creation of an additional student case manager to meet student demand. Additional resources will be used to support the acquisition of assistive technologies, retrofitting spaces with accessible furniture, and hiring skilled services (e.g. interpreters).*

5. **Increase retention efforts for specific student sub-populations:** Retention data indicate that selected student sub-populations retain at lower rates. These sub-populations include commuter students, transfer students, first generation students and Pell eligible students. Higher retention reduces time to degree for students, enhances graduation rates, strengthens the university's financial position, and ultimately improves student employment prospects. Additional resources will be used to expand tutoring services, offer enhanced learning resources, and provide more intensive academic advising.

*Funding for this initiative has been delayed until 2023-24.*

6. **Faculty and staff salaries:** The provision of effective instruction and the realization of equity goals requires UMW to recruit, retain and reward an effective and diverse workforce. To do this, UMW is planning to conduct equity and market studies for both faculty and staff. Once complete, the University will need to be in a position to respond to the results, make competitive offers, and address inequities, as well as accumulated compression and inversion.

*UMW is in the process of conducting a faculty equity study which is due to be complete in late fall 2022. Additional decisions about a staff equity study and market studies for*

*faculty and staff have yet to be made. At present, no additional funding has been identified to adjust salaries as a result of the equity study. Funding for this initiative has been delayed until 2023-24.*

7. **Develop and implement a life-design curriculum:** In recent years, UMW has invested significantly in the first-year experience for first-time, first-year students. This begins with the student's enrollment deposit in the spring of their senior year of high school, continues throughout the summer and new student arrival, and culminates with the first-year advising and seminar program that students complete in their first semester. The focus of the first semester curriculum covers the key skills necessary for college success (research, writing, and speaking) and key elements of academic advising (selecting and registering for classes, completing the general education program, finding a major).

At the same time, the state has invested in UMW's efforts to support students' post-college aspirations through additional funding to build the Center for Career and Professional Development.

The next step is to bring these strategic initiatives together to support students in developing higher order skills beyond the first semester, which are responsive to clear emerging needs from a more diverse student population, essential for completion of the bachelor's degree and necessary to prepare students for life after college. These include (1) having difficult conversations with diverse others, (2) mustering resilience in the face of adversity and failure, (3) exploring one's interests and strengths, and (4) engaging in deliberate planning for life at Mary Washington and beyond. UMW aims to develop a plan to integrate life design to support all students' in cultivating the knowledge, skills and habits of mind necessary to successfully navigate their time in college and live meaningful lives after graduation.

*UMW is in the developmental phase of this initiative in the form of its Quality Enhancement Plan (QEP) being developed in AY 22-23 as part of its decennial reaffirmation of accreditation by the Southern Association of Colleges and Schools Commission on Colleges (SACSCOC). Additional financial support for this initiative will be found through reallocation beginning in FY 24-25.*

8. **Establish an office of transfer student services:** UMW has been actively supporting transfer through its involvement with Transfer Virginia while building relationships with community colleges within the University's service area. Significant progress has been made to change policies and remove barriers for transfer students and our academic departments have been building pathways focused on reducing time to completion. To keep pace with this momentum, UMW will need to enhance its programmatic and human resources dedicated to transfer students. Establishing a dedicated center capable of providing comprehensive academic, financial, and career counseling along with a full slate of pathways, programs and experiences, to include residential living communities and experiential learning opportunities will significantly enhance UMW's to participate in closing completion gaps while reducing costs and ensuring that graduates are prepared

to enter the workforce as quickly as possible with the most appropriate credentials.

*Funding for this initiative has been delayed until 2023-24.*

9. **Expand the development of Open Education Resources (OER)**: Textbooks, media and other course materials represent a significant component of the cost of attendance for students. The use of open educational resources (OER) is a viable option for reducing these student costs. In accordance with SCHEV's strategic plan and UMW's policy on OER, UMW seeks to expand its support of OER by providing course-release time to faculty developing OER materials for their courses. Faculty development to ensure the accessibility of OER is particularly important.

*Funding for this initiative has been delayed until 2023-24\.*

10. **Refresh classroom and campus IT infrastructure**: In the midst of the pandemic UMW made modest investments to quickly deliver online and hybrid courses which involved the adoption of low-cost and temporary technological solutions to provide limited virtual access to students. Classrooms and instructional spaces on the Fredericksburg and Stafford campuses are not outfitted with the IT capabilities to ensure the durability of these emergency adjustments (e.g. microphones, secondary screens and cameras so that all have equal access to participate fully). Further investments in classroom technology and personnel to support flexible instruction and multiple modalities will provide UMW with the capacity to realize access and equity aspirations while supporting regional economic and workforce needs. The imperative is especially so for the Stafford campus which is fast becoming home to UMW's workforce pathway efforts in nursing and educator preparation involving local school districts and Germanna Community College.

*Modest progress has been made in this area, by upgrading a few classrooms around campus to support remote instruction from HEERF funding.*

11. **Streamline information systems**: Over several decades, the University has patched together an information system architecture which deploys a variety of different systems to manage all of the various operations and information sources of the university. These systems are not interoperable, some are at the end of their life cycle, and few permit the university to maximize efficiencies, reduce costs, and support strategic decisions. Investment in a single cloud-based system for student information, financial and human capital management, and analytics and reporting would significantly improve the University's effectiveness to fulfill its mission and student success goals while realizing long term cost savings.

*Funding for this initiative has been delayed until 2023-24.*

12. **Expand adult degree completion and continuing education programs**: Based on census data and a regional market survey conducted by the Division of Continuing and Professional Education, approximately a fifth to a third of residents in counties surrounding Fredericksburg have some college, no degree or an associate degree. Many

are working and require course scheduling options that provide flexible paths to degree completion or additional credentials, including on-line and hybrid courses and evening and weekend coursework.

*UMW is expanding its support for adult degree completion through the initiation of an online major in Leadership and Management which is one course of study in the Bachelor of Liberal Studies Degree. The University has also upgraded the advising position for this program and is expanding recruitment efforts through a streamlined approach to marketing and a reorganization of enrollment management operations.*

13. **Enhance support for the Commonwealth's museums at UMW:** In a unique arrangement, dating back several decades, UMW is responsible for the administration and stewardship of two Commonwealth owned museum properties (Gari Melchers Home and Studio at Belmont and the James Monroe Museum). Although the University receives a separate budget allocation to support these properties (Belmont, \$481,118; Monroe, \$273,947), it has with time proven insufficient to cover the full cost of museum operations and personnel. To sustain and tether museum operations to the academic mission of the institution, the University has come to subsidize the museums in the amount of \$85,785. In addition to these direct costs, there are many other indirect costs to UMW including the maintenance of the buildings and grounds on aging facilities which have significant deferred maintenance. In FY20-21, the properties saw significant revenue declines from the COVID-19 pandemic, requiring the University to further subsidize the properties by approximately \$100,000. Further permanent declines in funding (approximately \$26,000/year) will follow from the elimination of an annual subsidy from the UMW Foundation beginning in FY22. This budget request is designed to reduce the burden on the University's budget while supporting the work of the two museums as well as the ongoing maintenance and repair of the facilities.

*The university's 2022-23 operating budget includes an additional appropriate to provide support for the Commonwealth's museums which is committed to meeting staffing needs and operational expenses, including deferred maintenance for both facilities.*

**University of Mary Washington**  
**2022 Six-Year Plan Update**  
**Freedom of Expression and Inquiry**

The University of Mary Washington celebrates the right to freedom of expression on our campus by members of the University community as well as individual outside of the UMW community who wish to address our community. Free inquiry and free expression are indispensable to the vibrancy and vitality of UMW's campus.

As a public, liberal arts university, the UMW community is dedicated to providing a diverse, accepting, and supportive environment that holds all of its members to the highest standards of conduct, scholarship, integrity, inclusiveness, respect, and engagement. Through a commitment to these values, we strive to transform our academic community into a place where all will learn, thrive, and grow. As a community, UMW is committed to upholding these common *ASPIRE* values:

*Accountability* – we promote practices, behaviors, and attitudes where individuals to responsibility for their actions and decisions.

*Scholarship* – we promote intellectual inquiry by engaging ideas and one another in order to gain better understanding and contribute to knowledge.

*Personal and Institutional Integrity* – we are honorable in our academic and work endeavors as well as our interactions with others.

*Inclusive Excellence* – we strive for all members of the community to have equitable access to opportunities for participation and the resources necessary for success.

*Respect and Civility* – we foster an environment in which every individual is treated with dignity at all times by valuing the inherent worth of all identities, abilities, and differences.

*Engagement* – we develop engaged members of our community who actively participate in the community through responsible leadership and service.

The University is committed to support the exercise of constitutionally-protected speech in all of its programs and facilities while maintaining a safe atmosphere free from major disruption. In keeping with and maintaining these freedoms, the University utilizes established policies and guidelines for the use of its facilities in order to preserve its mission and properties, to secure its operational objectives, and to safeguard the community.

UMW's website includes links to the University's policies regarding constitutionally-protected speech. These policies are included in this document on pages 3 – 7. In addition, the University's website includes links to a number of resources that guide students, faculty and staff individuals for reporting an incident of disruption of constitutionally-protected speech or other expressive activities, including demonstrations, protests, marches, rallies, leaflet distribution or other activity involving the public display of expression by a group or multiple groups.

UMW also meets the responsibilities of § 23.1-401.1., Code of Virginia, which requires an annual report regarding the University's policies on free speech and the communication of those policies to the appropriate employees and any complaints filed in court in the preceding year of any alleged violation of the First Amendment to the United States Constitution. The latest report and annual certification are included in these materials on pages 8 – 9.

UMW provides a number of opportunities each year to engage the campus in issues around diversity of thought and freedom of expression. These include:

- The Student Government Association holds *Can We Talk* sessions, many of which arise to address controversial topics.
- The Center for Community Engagement has robust voter education and civic participation programming.
- The James Farmer Multicultural Center has program throughout the year as part of its Cultural Awareness Series whose focus is dialogue across differences.
- Student Activities and Engagement oversees annual student leadership training that includes respect and civility issues.

In addition, UMW is developing plans to host speakers on campus that will discuss our right to free speech. We will also offer training to faculty and staff that assists them in facilitating conversations where a diversity of perspectives is invited, listened to, and learned from.

<b>* POLICY NAME:</b>	<b>Expressive Activity By Members of University Community</b>
<b>* POLICY TYPE:</b>	Presidential Policy - University Administrative Policy
<b>POLICY #:</b>	F.8.4.
<b>*STATUS:</b>	Active
<b>*CONTACT OFFICE:</b>	Student Affairs
<b>*OVERSIGHT EXECUTIVE:</b>	Vice President for Student Affairs
<b>*APPLIES TO:</b>	All members of the University community defined as students, faculty, and staff.
<b>*PURPOSE:</b>	The University of Mary Washington supports the right of individual students, student organizations, faculty, and staff to dissent and to demonstrate providing such activities do not disrupt normal campus operations, obstruct free access to University buildings, or unreasonably infringe upon the rights of others.
<b>DEFINITIONS:</b>	"Expressive Activity" includes gatherings of one or more members of the University community for the purposes of publicly communicating a grievance or publicly stating a position or cause by spoken word, placard, or action.  For the purpose of implementation, expressive activity shall refer to all demonstrations, protests, marches, rallies, leaflet distribution or other activity involving the public display of expression by a group or multiple groups.
<b>*POLICY STATEMENT:</b>	The University of Mary Washington celebrates the right to freedom of expression by members of the University community on our campus. Free inquiry and free expression are indispensable to the vibrancy and vitality of a campus community. Diverse perspectives are honored and valued on campus, and it is essential that community members have the opportunity to engage in peaceful and orderly protests and demonstrations. This policy is structured to assure equal opportunity for expressive activity by all members of the University community, to preserve order within the University Community, to protect and preserve University property, and to provide a secure environment to individual members of the campus community exercising freedom of expression.
<b>PROCEDURES:</b>	All University property is intended primarily for use by students, faculty and staff in their efforts to advance the educational mission of the University. Consistent with that mission, most outdoor areas of campus represent a limited public forum for speech and other expressive activities by members of the University community. The indoor facilities on campus are typically dedicated to particular academic or administrative purposes and may be used for expressive activity only to the extent that such activity does not unreasonably interfere with the intended purpose of the facilities. All organizers are encouraged to provide advance notice to the University Police prior to commencement of an expressive activity in order to promote the safety and security of all individuals on campus. To be useful, advance notification must include the day, time, and location where the demonstration or other expressive activity is expected to begin as well as the full name and detailed contact information for the primary organizer and/or person

	<p>responsible for the activity.</p> <p>Certain areas of campus are reservable by members of the campus community. If students, student organizations, faculty, or staff desire to reserve campus facilities to conduct expressive activities, they must submit their requests to the appropriate administrator with sufficient notice to allow for logistical support and to otherwise comply with the applicable facility use guidelines.</p>
<p><b>* General Procedures for Implementation:</b></p>	<p>The University of Mary Washington does not permit expression that is unlawful or otherwise prohibited by law. Such expression includes, but is not limited to, defamation, incitement to unlawful conduct, imminent threats of actual violence or harm, obscenity, fighting words, copyright or trademark violation, criminal or civil harassment, sexual harassment, trespass, and false advertising.</p> <p>In order that individuals and groups engaging in expressive activity not interfere with the operation of the University, state or federal law, or with the rights of others the following provisions shall apply:</p> <ol style="list-style-type: none"> <li>a. Persons or their belongings may not block or otherwise unreasonably interfere with the free flow of vehicular, bicycle, or pedestrian traffic. The right of way on streets and sidewalks must be maintained.</li> <li>b. Persons or their belongings may not block or otherwise unreasonably interfere with ingress and egress into and out of campus buildings.</li> <li>c. Persons or their belongings shall not obstruct or attempt to force the cancellation of any event or activity sponsored by the University or by any users authorized to use University facilities.</li> <li>d. Persons shall not engage in harassing, physically abusive, threatening, or intimidating conduct toward any person.</li> <li>e. Persons shall comply with the directions of any University official acting in the performance of his or her duty.</li> <li>f. Classes or other scheduled activities shall not be unreasonably disrupted.</li> <li>g. Use of public address systems and amplified sound must be registered at least 72 hours in advance with the University Police. Use of such equipment may not unreasonably interfere with classes or other scheduled activities.</li> <li>h. When an invited speaker is the object of protest, persons may demonstrate and/or distribute leaflets outside the building where the speech is taking place. Persons who wish to enter the building must do so as members of the audience, paying admission fees where applicable, and must give the speaker a respectful hearing. Failure to grant the speaker a respectful hearing may result in the offending persons being asked to leave.</li> <li>i. All applicable federal, state, and local laws and regulations (including local ordinances regarding demonstrations on public streets), as well as all applicable University policies must be observed and followed.</li> </ol>
<p><b>* Process for Developing, Approving, and Amending Procedures:</b></p>	<p>This policy will be reviewed bi-annually or sooner as directed by the University President. Proposed changes will be submitted through the Vice President for Student Affairs to the President for approval. Administrative procedures in support of the policy may be changed without the approval of the President.</p>
<p><b>* Publication and Communication:</b></p>	<p>This policy is communicated via the public portion of the University's policy website, on the Public Safety website, and via BoardDocs.</p>



<p>* Compliance Monitoring and Reporting:</p>	<p>Compliance will be monitored by the Vice President of Student Affairs. Any action required will be taken by the Chief of Police or designee in consult with the VP Student Affairs.</p>
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<b>* POLICY NAME:</b>	<b>REQUEST TO ADDRESS CAMPUS COMMUNITY</b>
<b>* POLICY TYPE:</b>	Presidential Policy - University Administrative Policy
<b>POLICY #:</b>	C.1.1
<b>*STATUS:</b>	Active
<b>*CONTACT OFFICE:</b>	Office of the President – University Events & Conferencing
<b>*OVERSIGHT EXECUTIVE:</b>	Chief of Staff--Special Assistant to the President for University Events
<b>*APPLIES TO:</b>	Non-University Individuals or Groups
<b>*PURPOSE:</b>	To accommodate the occasional request by individuals from outside the UMW community who seek to address the campus community, so that persons who are not sponsored by a member of the campus community can be afforded a limited opportunity to speak publicly on campus.
<b>*DEFINITIONS:</b>	Individual from outside the UMW community" shall mean anyone who is not a UMW student or faculty or staff member.
<b>*POLICY STATEMENT:</b>	All University property is intended primarily for use by students, faculty and staff in their efforts to advance the educational mission of the University. This policy is structured to provide limited opportunities for individuals from outside the UMW community to address the campus community while preserving order within the University Community, protecting and preserving University and personal property, and providing a secure environment for all on campus.
<b>PROCEDURES:</b>	
<b>* General Procedures for Implementation:</b>	Individuals from outside the UMW community who wish to address the campus community must provide three business days' advance written notification to the Office of University Events and Conferencing. Advance notification is intended to promote the efficient use of university facilities and resources as well as ensuring the safety of all event participants, including members of the campus community. Advance notifications must include the date, time and preferred location of the proposed address as well as the full name and detailed contact information for the primary organizer. On the Fredericksburg campus, the designated areas in which individuals from outside the campus community can address the campus community are: the front of James Farmer Hall; Jefferson Square Lawn; the campus walk side of Jepson Hall, and Palmieri Plaza outside Monroe Hall.

	<p>On the Stafford campus, the designated area in which individuals from outside the campus community can conduct expressive activities is the lawn area between the North and South buildings. The area designated for the Dahlgren Center is the entry plaza area as long as entry/egress is not impaired. The University Police will alert the primary organizer as soon as possible if the details provided in an advance notification indicate that interference with a planned activity or event is likely.</p> <p>In order that individuals addressing the campus community not interfere with the operation of the University, or state or federal law or with the rights of others, the following provisions apply:</p> <p>Expressive activities addressing the campus community must not obstruct in any way vehicular or pedestrian traffic or block ingress or egress to facilities whether outdoor or indoor. The right of way on streets and sidewalks must be maintained. Obstruction of public sidewalks and streets is a violation of Virginia criminal law (Va. Code§18.2-404).</p> <p>Expressive activities must not unreasonably interfere with the educational or administrative functions inside or outside of buildings.</p> <p>Individuals or their belongings shall not obstruct or attempt to force the cancellation of any event or activity sponsored by the University or by any users authorized to use University facilities.</p> <p>All applicable local, state and federal laws and University policies must be observed and followed.</p> <p>Individuals shall comply with the directions of any University official acting in the performance of his or her duty.</p> <p>Use of sound amplification on campus must be registered with the Office of University Events &amp; Conferencing three business days in advance. Use of sound amplification must not unreasonably interfere with the educational and administrative activities of the University.</p> <p>The University does not permit expression that is unlawful or otherwise prohibited by law. Such expression includes, but is not limited to defamation, incitement to unlawful conduct, imminent threats of actual violence or harm, obscenity, fighting words, copyright or trademark infringement; criminal or civil harassment, sexual harassment, trespass and false advertising.</p>
<p>* Process for Developing, Approving, and Amending Procedures:</p>	<p>This policy will be reviewed annually. Proposed changes will be submitted through the Special Assistant to the President for University Events to the University President for approval. Administrative procedure in support of execution of this policy may be revised without approval of the President.</p>
<p>* Publication and Communication:</p>	<p>This policy will be maintained on the University’s website and accessible via BoardDocs as well as on the Office of University Events &amp; Conferencing web page.</p>
<p>*Compliance Monitoring and Reporting:</p>	<p>Compliance will be monitored by the Chief of Staff.</p>

**Constitutionally-Protected Speech  
Policies, Materials, and Reports  
Annual Report  
University of Mary Washington  
December 1, 2021**

As per section 23.1-401.1 of the Code of Virginia, relating to public institutions of higher education in the Commonwealth, the University of Mary Washington submits the following:

- 1) A copy of the institution's policies as described in subsection B and materials on such policies as described in subsection C.

UMW's policies on free speech and description of processes to report violations of the First Amendment for students, faculty, and staff are detailed on the following website, which may be accessed by searching for "free speech" on the University's main webpage:

<https://students.umw.edu/free-speech/>

- 2) Certification that the institution has complied with subsection C: *Each public institution of higher education shall develop materials on the policies established pursuant to subsection B and notify any employee who is responsible for the discipline or education of enrolled students of such materials.*

Please see the December 1, 2021 letter from Dr. Troy Paino, President of the University of Mary Washington, below.

- 3) A copy of any complaint filed in a court of law since December 1 of the preceding year to initiate a lawsuit against the institution or an employee of the institution in his official capacity for an alleged violation of the First Amendment to the United States Constitution.

There have been no such complaints filed in a court of law since December 1, 2020.

University of  
Mary Washington

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December 1, 2021

The Honorable Ralph S. Northam  
Governor, Commonwealth of Virginia  
P.O. Box 1475  
Richmond, VA 23218

Dear Governor Northam:

As the President of the University of Mary Washington, I officially affirm that the University has complied with subsection C, in section 23.1-401.1 of the Code of Virginia:

*C. Each public institution of higher education shall develop materials on the policies established pursuant to subsection B and notify any employee who is responsible for the discipline or education of enrolled students of such materials.*

Sincerely,



Troy D. Paino, J.D., Ph.D.  
President

**University of Mary Washington**  
**2022 Six-Year Plan**  
**Responses to Questions from the OP6**

**Questions for All Institutions**

1. What institutions have announced major initiatives in the past few months that don't appear in the updated six-year plans? To what extent do those initiatives align with new state funding in Chapter 2? To what extent are some of these initiatives duplicative?

**UMW Response:**

UMW has not announced any new major initiatives in the past few months.

2. Multiple institutions are requesting general fund support for information technology. OP6 members asked what efforts, if any, are being taken to collaborate with other institutions to collaborate and control costs?

**UMW Response:**

UMW is in the early stages of planning for a single cloud-based system for student information, financial and human capital management, and analytics and reporting. Before the institution can proceed beyond initial planning, a source of funding must first be identified. Once that is finalized, UMW will welcome the opportunity to collaborate with other institutions seeking the same enterprise solution in planning, sharing resources and contract negotiations. In addition, UMW will seek to partner with the Virginia Higher Education Procurement Consortium through the contracting process to ensure that UMW and the Commonwealth benefit from effective pricing negotiations.

3. Only one institution requested general fund support for mental health services. This surprised the OP6 considering how often mental health needs have arisen in other contexts. Will there be other future requests regarding mental health services?

**UMW Response:**

UMW is actively engaged in providing mental health services for students. On September 12, 2022, UMW students seeking counseling services will have access to such resources 24 hours a day, seven days a week, with on-campus options at the Talley Center for Counseling Services during business hours and afterhours and weekend mental health counseling available through ProtoCall, which is a telephonic behavioral health service staffed by trained clinicians. When a student calls afterhours and during school breaks, a clinician from ProtoCall's team of trained professionals will offer risk assessment and crisis stabilization for that student. This service focuses on solution-

based intervention to assess a student's situation and arrange for appropriate follow-up care and referral, including on-campus coordination and services.

UMW's draft strategic vision includes a plan to enhance the capacity for employees to support students with mental health needs through "gatekeeper" training as well as resource development, programming, and communication of services and supports for the well-being of all students, faculty and staff.

Also, UMW will be submitting a proposal to SCHEV to participate in the Higher Education Mental Health Workforce Pilot. The purpose of this pilot program is to 1) expand mental health services to students on campus; and simultaneously 2) increase the mental health workforce pipeline by offering supervised clinical hours toward the LCSW or LPC credentials.

In the event that the Commonwealth supports a state-wide funding initiative for mental health services, UMW is very much interested in being a participant.

### **Questions for the University of Mary Washington**

1. For the request to streamline information systems, given the larger amount, please provide a more detailed description of what these resources would go towards, how UMW is defining this as a "project" under VITA standards and how it could leverage statewide procurement with other institutions.

#### **UMW Response:**

During the three-year implementation period associated with this project, the total cost of \$14.5M is largely comprised of \$2,475,000 for subscriptions fees (at \$825,000 annually) and \$12M for implementation costs, including engagement of an implementation partner (implementation of enterprise systems are too complex to handle in-house), staffing back-fills in human capital management, finance, student accounts, registrar, admissions, academic advising, institutional analysis and effectiveness and financial aid, and user training.

As a Level II institution with delegated administrative authority for Information Technology, UMW is not required to get VITA's approval for a project over \$1M. We are, however, required to notify VITA of the project and provide monthly status updates.

UMW will seek to partner with other Virginia institutions adopting the same solution to secure group pricing or work with the Virginia Higher Education Procurement Consortium in contract negotiations.

2. Please provide more information regarding the new program in civil discourse and debate and the access to internship opportunities with a line-item breakout.

**UMW Response:**

The following is a line-item breakout for the new program in Civil Discourse and Debate:

Program Director (salary/benefits)	\$130,000
Two faculty lines to provide instruction (salary/benefits)	190,000
Administrative support staff (salary/benefits)	75,000
Program and administrative operating	30,000
Support for education students earning debate credential	60,000
Faculty training to incorporate debate skill in classroom	40,000
<b>Total</b>	<b>\$525,000</b>

For the Internship initiative, the estimated funding of \$370,000 will support two staff professionals to manage internship operations (salary/benefits) and \$150,000 for internship grants to students to ensure that all students have access.

3. Regarding the faculty and staff salaries, is the money requested to create a pool for salaries or to finance the faculty equity study?

**UMW Response:**

The identified funding will be used entirely to create a pool for salaries. UMW has identified one-time funding within its budget to conduct a faculty equity study.