

INSTRUCTIONS FOR SUBMITTING 2022 INSTITUTIONAL SIX- PLEASE READ INSTRUCTIONS CAREFULLY

Due Date: July 1, 2022

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 2022 General Assembly session, a joint resolution approved by the House and Senate (SJR53) 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

2022 Six-year Plan

The 2022 Six-Year Plans are due July 1, 2022. The review group (referred to as Op Six) as outlined in § 23.1-306 (B) - see Legislative Reference section below - will meet in August to review the submissions and provide comments by September 1. Final plans are due to SCHEV by October 1 or immediately following an institution's Fall Board of Visitors' meeting, if it is later than October 1. The six-year plan consists of an Excel workbook (Part I) and an accompanying narrative (Part II). 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.** The narrative (Part II) should be updated as needed due to corresponding changes in Part I or with any

INSTRUCTIONS FOR PART 1 (EXCEL WORKBOOK)

General Instructions

1. Update FY22 with actual revenue. Adjust FY23 in light of actual T&F and General Fund resources and FY24 with estimated T&F and known General Fund resources.
2. Re-assess strategies/initiatives (including making changes to reflect legislative action) in the Academic-Financial Worksheet. Deletions, additions or revisions to strategies/initiatives should be indicated by using codes in the Priority Ranking column. For deletions, change the PR number to a 'D'; for additions, add an 'A' before the PR number; and for revisions, add an 'R' before the PR number. Provide specifics about deletions, additions or revisions to strategies/initiatives in the corresponding Narrative fields on the worksheet (columns P and Q) and modify cost information as appropriate. Strategies/initiatives that the institution considers important, but were not funded, can be included, but there is an assumption that these items do not have General Fund support. Please remember to also update the narrative sections in Part II as needed.
3. Board approval of the updated 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

Instructions by Section

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 its 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

Contacts for Questions:

General Questions - Tom Allison (tomallison@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. An 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 § 23.1-307.

10. 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, the economic development policy developed pursuant to § 2.2-205, the strategic plan developed pursuant to § 2.2-227.1, relevant regional economic growth and diversification plans prepared by

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 (2022): 2022-23 through 2027-28

Due: July 1, 2022

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
William & Mary

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
\$17,570	\$18,372	4.6%	\$19,010	3.5%

In-State Undergraduate Tuition and Mandatory E&G Fees

2022-23 (Revised)		2023-24 (Revised)	
Planned Charge	% Increase	Planned Charge	% Increase
\$17,570	0.0%	\$18,221	3.7%

In-State Undergraduate Mandatory Non-E&G Fees

2021-22	2022-23		2023-24	
Charge (BOV approved)	Planned Charge	% Increase	Planned Charge	% Increase
\$6,242	\$6,429	3.0%	\$6,622	3.0%

In-State Undergraduate Mandatory Non-E&G Fees

2022-23 (Revised)		2023-24 (Revised)	
Planned Charge	% Increase	Planned Charge	% Increase
\$6,400	2.5%	\$6,656	4.0%

**Part 2: Tuition and Other Nongeneral Fund (NGF) Revenue
William & Mary**

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.

Items	Revised						
	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
E&G Programs							
Undergraduate, In-State	\$72,315,913	\$75,329,400	\$80,736,400	\$86,998,400	\$75,097,749	\$77,202,579	\$81,642,800
Undergraduate, Out-of-State	\$82,679,034	\$80,884,400	\$83,735,400	\$88,250,900	\$87,547,417	\$88,467,093	\$92,736,200
Graduate, In-State	\$17,846,558	\$17,846,600	\$17,846,600	\$17,846,600	\$21,797,324	\$19,455,248	\$19,547,200
Graduate, Out-of-State	\$17,355,763	\$16,847,200	\$16,847,200	\$16,847,200	\$18,023,757	\$20,426,372	\$20,437,600
Law, In-State	\$5,563,100	\$4,787,200	\$4,787,200	\$4,787,200	\$6,039,997	\$6,038,134	\$6,038,200
Law, Out-of-State	\$18,490,865	\$21,417,200	\$21,417,200	\$21,417,200	\$18,537,994	\$18,509,030	\$18,509,000
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	\$7,555,488	\$7,467,400	\$7,500,000	\$7,600,000	\$8,851,375	\$8,839,600	\$8,839,600
Total E&G Revenue	\$221,806,721	\$224,579,400	\$232,870,000	\$243,747,500	\$235,895,613	\$238,938,056	\$247,750,600

Non-E&G Fee Revenue	2020-2021 (Actual)	2021-2022 (Estimated)	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	\$22,354,400	\$23,114,400	\$23,807,800	\$24,522,000	\$24,884,576	\$25,506,700	\$26,526,968
All Other students	\$18,490,684	\$19,119,400	\$19,693,000	\$20,283,800	\$20,018,464	\$20,518,900	\$21,339,700
Total non-E&G fee revenue	\$40,845,084	\$42,233,800	\$43,500,800	\$44,805,800	\$44,903,040	\$46,025,600	\$47,866,668
Total Auxiliary Revenue	\$102,926,780	\$118,218,600	\$121,185,600	\$124,230,600	\$123,725,600	\$130,876,600	\$134,053,440

**Part 4: General Fund (GF) Request
William & Mary**

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
	Strategies (Match Academic-Financial Worksheet Short Title)	VP Goal	Biennium 2022-2024 (7/1/22-6/30/24)								
			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	
Funded in 2022	Base fund one-time assistance from FY22	2	\$1,376,500	\$1,376,500	\$1,376,500	\$1,376,500	\$0	\$0	\$0	\$0	These funds were included in Chapter 2, 2022 Special Session, Virginia Acts of Assembly.
Funded in 2022	Expanding historical and cultural research to tell a more inclusive history	1	\$4,000,000	\$4,000,000	\$500,000	\$500,000	\$0	\$0	\$0	\$0	These funds were included in Chapter 2, 2022 Special Session, Virginia Acts of Assembly.
1	Increased Financial Aid for Pell Eligible Students	2	\$1,200,000	\$1,200,000	\$2,400,000	\$2,400,000	\$0	\$0	\$0	\$0	Chapter 2 (2022 Special Session) provides \$25 million in SCHEV's budget to be allocated across the institutions.. W&M will work with SCHEV to seek funding through that mechanism.
2	Increase Faculty in Computer Science, Data Science, and Applied Computer Engineering						\$0	\$0	\$1,000,000	\$1,000,000	BY 2026, W&M seeks to expand its STEM faculty be 15 FTE. This request will fund 5 new faculty lines in data science, computational science and/or applied computer engineering. See Narrative Page 7.
3	Expanding Jump-Start Data Science Program	3	\$400,000	\$400,000	\$400,000	\$400,000	\$0	\$0	\$0	\$0	W&M is deferring this request based upon advice from the Secretary's Office.
4	O&M for New Facilities	2	\$400,000	\$160,000	\$980,000	\$385,000	\$0	\$0	\$0	\$0	Funding for both fiscal years is currently included in Chapter 2 for \$157k in FY23 and \$314k in FY24.
			\$7,376,500	\$7,136,500	\$5,656,500	\$5,061,500	\$0	\$0	\$1,000,000	\$1,000,000	

**Part 5: Financial Aid Plan
William & Mary**

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	\$72,315,913	\$13,555,700	18.7%	\$23,093,245	\$366,809	\$968,603	\$73,651,325
Undergraduate, Out-of-State	\$82,679,034	\$15,498,300	18.7%	\$5,960,694	\$83,191	\$62,909	\$82,825,134
Graduate, In-State	\$17,846,558	\$1,921,500	10.8%	\$1,304,589	\$246,785	\$916,637	\$19,009,980
Graduate, Out-of-State	\$17,355,763	\$1,868,600	10.8%	\$2,485,544	\$1,550,623	\$194,385	\$19,100,771
First Professional, In-State	\$5,593,100	\$2,959,500	53.2%	\$2,438,934	\$0	\$2,541	\$5,565,641
First Professional, Out-of-State	\$18,490,865	\$9,837,000	53.2%	\$10,356,533	\$0	\$0	\$18,490,865
Total	\$214,251,233	\$45,640,600	21.3%	\$45,640,538	\$2,247,408	\$2,145,075	\$218,643,715

Compliance with § 4-5.1.a.i
-\$8,401,067 Compliant

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	\$75,329,400	\$16,520,100	21.9%	\$27,190,650	\$823,300.00	\$968,603	\$77,121,303
Undergraduate, Out-of-State	\$80,884,400	\$17,738,300	21.9%	\$7,067,700	\$186,700.00	\$62,909	\$81,134,009
Graduate, In-State	\$17,846,600	\$1,835,800	10.3%	\$1,336,000	\$0	\$916,637	\$18,763,237
Graduate, Out-of-State	\$16,847,200	\$1,733,000	10.3%	\$2,232,750	\$0	\$194,385	\$17,041,585
First Professional, In-State	\$4,787,200	\$2,373,900	49.6%	\$2,494,100	\$0	\$2,541	\$4,789,741
First Professional, Out-of-State	\$21,417,200	\$10,620,600	49.6%	\$10,500,400	\$0	\$0	\$21,417,200
Total	\$217,112,000	\$50,821,700	23.4%	\$50,821,600	\$1,010,000	\$2,145,075	\$220,267,075

Compliance with § 4-5.1.a.i
-\$10,290,950 Compliant

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	\$80,736,400	\$17,553,200	21.7%	\$28,390,650	\$823,300	\$1,013,159	\$82,572,859
Undergraduate, Out-of-State	\$83,735,400	\$18,205,200	21.7%	\$7,367,700	\$186,700	\$65,802	\$83,987,902
Graduate, In-State	\$17,846,600	\$1,835,800	10.3%	\$1,336,000	\$0	\$916,637	\$18,763,237
Graduate, Out-of-State	\$16,847,200	\$1,733,000	10.3%	\$2,232,750	\$0	\$194,385	\$17,041,585
First Professional, In-State	\$4,787,200	\$2,373,900	49.6%	\$2,494,100	\$0	\$2,541	\$4,789,741
First Professional, Out-of-State	\$21,417,200	\$10,620,600	49.6%	\$10,500,400	\$0	\$0	\$21,417,200
Total	\$225,370,000	\$52,321,700	23.2%	\$52,321,600	\$1,010,000	\$2,192,524	\$228,572,524

Compliance with § 4-5.1.a.i
-\$10,457,850 Compliant

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	\$86,998,400	\$18,595,300	21.4%	\$29,890,650	\$823,300	\$1,048,619	\$88,870,319
Undergraduate, Out-of-State	\$88,250,900	\$18,863,000	21.4%	\$7,567,700	\$186,700	\$68,105	\$88,505,705
Graduate, In-State	\$17,846,600	\$1,835,800	10.3%	\$1,336,000	\$0	\$916,637	\$18,763,237
Graduate, Out-of-State	\$16,847,200	\$1,733,000	10.3%	\$2,232,750	\$0	\$194,385	\$17,041,585
First Professional, In-State	\$4,787,200	\$2,373,900	49.6%	\$2,494,100	\$0	\$2,541	\$4,789,741
First Professional, Out-of-State	\$21,417,200	\$10,620,600	49.6%	\$10,500,400	\$0	\$0	\$21,417,200
Total	\$236,147,500	\$54,021,600	22.9%	\$54,021,600	\$1,010,000	\$2,230,288	\$239,387,788

Compliance with § 4-5.1.a.i
-\$10,915,750 Compliant

2021-22 (Actual)								
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)	Compliance with § 4-5.1.a.i
Undergraduate,	\$75,097,749	\$14,726,700	19.6%	\$25,503,365	\$669,580	\$1,573,398	\$77,340,727	-\$9,626,313 Compliant
Undergraduate,	\$87,547,417	\$17,168,000	19.6%	\$6,391,343	\$328,405	\$48,571	\$87,924,393	
Graduate, In-St	\$21,797,324	\$2,134,100	9.8%	\$1,369,253	\$179,810	\$1,020,865	\$22,997,999	
Graduate, Out-	\$18,023,757	\$1,764,700	9.8%	\$2,529,562	\$1,640,247	\$5,243,881	\$24,907,885	
First Profession	\$6,039,997	\$2,931,800	48.5%	\$2,546,296	\$0	\$103,545	\$6,143,542	
First Profession	\$18,537,994	\$8,998,400	48.5%	\$9,383,914	\$0	\$15,012	\$18,553,006	
Total	\$227,044,238	\$47,723,700	21.0%	\$47,723,732	\$2,818,042	\$8,005,272	\$237,867,552	

2022-23 (Estimate)								
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)	Compliance with § 4-5.1.a.i
Undergraduate,	\$77,202,579	\$16,281,100	21.1%	\$28,046,332	\$669,580	\$1,573,398	\$79,445,557	-\$10,844,280 Compliant
Undergraduate,	\$88,467,093	\$18,656,600	21.1%	\$6,891,343	\$328,405	\$48,571	\$88,844,069	
Graduate, In-St	\$19,455,248	\$1,901,900	9.8%	\$1,369,253	\$179,810	\$1,020,865	\$20,655,923	
Graduate, Out-	\$20,426,372	\$1,996,900	9.8%	\$2,529,562	\$1,640,247	\$5,243,881	\$27,310,500	
First Profession	\$6,038,134	\$2,934,600	48.6%	\$2,546,296	\$0	\$107,400	\$6,145,800	
First Profession	\$18,509,030	\$8,995,600	48.6%	\$9,383,914	\$0	\$15,012	\$18,524,042	
Total	\$230,098,456	\$50,766,700	22.1%	\$50,766,699	\$2,818,042	\$8,005,272	\$240,921,770	

2023-24 (Estimate)								
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)	Compliance with § 4-5.1.a.i
Undergraduate,	\$81,642,800	\$17,059,800	20.9%	\$29,346,332	\$694,400	\$1,631,600	\$83,968,800	-\$11,361,480 Compliant
Undergraduate,	\$92,736,200	\$19,377,900	20.9%	\$7,091,343	\$340,600	\$50,400	\$93,127,200	
Graduate, In-St	\$19,547,200	\$1,906,000	9.8%	\$1,369,253	\$186,500	\$1,058,600	\$20,792,300	
Graduate, Out-	\$20,437,600	\$1,992,800	9.8%	\$2,529,562	\$1,700,900	\$5,437,900	\$27,576,400	
First Profession	\$6,038,200	\$2,934,600	48.6%	\$2,546,296	\$0	\$107,400	\$6,145,800	
First Profession	\$18,509,000	\$8,995,600	48.6%	\$9,383,914	\$0	\$15,000	\$18,524,600	
Total	\$238,911,000	\$52,266,700	21.9%	\$52,266,699	\$2,922,400	\$8,301,500	\$250,134,900	

* 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:

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?

Through the pandemic, William & Mary (W&M) has leaned on its strengths, adopting a more nimble approach to addressing the needs of students, faculty, and staff. Working across the university, in a matter of weeks leadership led effective adaptations to ensure students would stay on track to complete their degrees. For example, W&M undertook rapid changes:

1. **Upgraded Learning Spaces.** Information Technology quickly identified and supported needed upgrades to classrooms and conference rooms around campus to provide a better hybrid/online learning environment.
2. **New Instructional Modes.** W&M's Studio for Teaching & Learning Innovation (STLI) served a critical role in providing faculty with the training and resources needed to quickly pivot the modality of instruction. With fewer than 10% of W&M faculty reporting experience in teaching online or in a blended format at the start of the pandemic, the skills and experience gained over the last 30 months have prepared most W&M faculty for future innovation in teaching and learning. Progress that normally would have

spanned a decade instead developed within a year. In addition, W&M renegotiated the agreement with Everspring, Inc, our primary online program management (OPM) partner. W&M also entered into a new arrangement with Kaplan that will allow the university to further develop online programs, course offerings for high school students, and potentially programs for adult learners seeking to update their skills.

3. **Centralized Career Services.** In Spring 2020, W&M revamped career services to provide students additional focused pathways to their first jobs during an economic downturn. More than 80 W&M professionals from 30 units coordinated career development efforts, in the process establishing the Professional Development Academy for current students and recent alumni (which is now a self-paced Blackboard course). They also organized the Employer Partnership Team, which fosters holistic partnerships with employers across all industries to bolster career development opportunities for W&M students and alumni.

In October 2021, the Office of Career Development & Professional Engagement was transformed to support Vision 2026, William & Mary's strategic plan. Within the plan there is a new movement toward lifelong career engagement, calling in all alumni, parents, and friends of the university to support career readiness for all students. The bold plan expands on W&M's current position as the top public university for internships to advocate a paid internship or other applied learning experience for all qualified undergraduates. To engage external constituents, the university has contracted with Graduway, the leading networking & community platform, to recruit and mentor students, engage alumni and volunteers, and cultivate donors at scale.

To increase career readiness of students, William & Mary participated in the National Career Readiness Project and piloted SkillsSurvey to gather data on high impact practices and skills to prepare for university-wide internship and applied learning launch. Through the Office of Career Development & Professional Engagement, W&M is participating in the 757 Regional Internship Collaborative funded through SCHEV's Innovative Internship Fund and Program funded by the Commonwealth. The program brings together peer institutions in the Commonwealth, Public K-12 Schools, and Workforce Councils, bringing together more than 30 partnering organizations. The partnerships are essential to maintain talent pathways and connections have been established with Chamber RVA, The Virginia Talent + Opportunity Partnership through SCHEV, Virginia Bio, and the Virginia Association of Colleges and Employers.

Despite the challenges brought on by COVID-19, W&M's enrollment, degree completion, and career placement have remained strong.

Reopened in person in August of 2020. While W&M experienced significant success during the pandemic, the university also discovered vulnerabilities. W&M clearly saw the negative effects of isolation on learning, the importance of peer cohorts for low-income and first-generation

students, and weaknesses in broadband across the Commonwealth that led to unequal access for students.

These realities made reopening in person in August 2020 crucial to meeting W&M's goals for student completion. W&M has remained fully in person since that time. The university makes decisions in a phased way based on the best data available to support the needs of students, faculty, and staff. In that context, W&M continues to assess how different modalities of teaching and learning inform the university's approach long term. While hybrid learning was successful, W&M has consistent feedback from students and faculty emphasizing the importance of the in-person experience.

As the university moves forward, W&M is preserving the core strength of providing an exceptional in-person education while experimenting with new pathways to growth through innovative applications of technology. Faculty-student connections fostered through the hands-on approach to education at W&M is a hallmark of the value the university provides. W&M also learned that students' access to technology is disparate; relying on online-only delivery limits access to some students W&M is seeking to serve. For this reason, W&M urges the Commonwealth to continue to invest in broad-band access for all Virginians.

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.

In 2019, President Rowe engaged the campus community over a six-month period to formulate and revise the university's vision, mission, and values statements. This process, and the subsequent statements included below, initiated the university's multi-phased strategic planning process.

Our Vision

William & Mary transcends the boundaries between research and teaching, teaching and learning, learning and living. People come to William & Mary wanting to understand and change the world – and together we do.

Our Mission

A preeminent, public research university, grounded in the liberal arts and sciences since 1693, William & Mary is a vibrant and inclusive community. Through close mentoring and collaboration, we inspire lifelong learning, generate new knowledge, and expand understanding. We cultivate creative thinkers, principled leaders, and compassionate global citizens equipped for lives of meaning and distinction. William & Mary convenes great minds and hearts to meet the most pressing needs of our time.

Our Values

W&M's core values that infuse our collective effort include belonging, curiosity, excellence, flourishing, integrity, respect, and service. William & Mary is a community that fosters deep human connection. We reflect on the lessons of history to meet the challenges of a rapidly changing world. We engage diverse perspectives and seek wisdom in bridging differences. Together, we are unceasing in our efforts to make a meaningful difference in our communities, the Commonwealth, the nation, and the world.

W&M utilizes this established framework to be a transformative institution in the lives of its students, the surrounding community, and the Commonwealth. The strategic planning effort established a number of goals:

- Advance a whole-institution mindset that leverages W&M's distinctive assets as a liberal arts and sciences institution and its track record of excellence to address key business and social issues with creativity.
- Embrace and expand on W&M's history of innovation by encouraging entrepreneurship and disciplined experimentation.
- Position the university for long-term financial sustainability consistent with its academic mission and commitment to access and affordability.

W&M's Strategic Direction: Vision 2026

In February 2022, President Katherine A. Rowe unveiled William & Mary's strategic plan, *Vision 2026*. The bold plan builds on W&M's distinctive strengths and prioritizes areas in which the university has a competitive advantage in order to address urgent global challenges. After a two-year [planning process](#) that engaged the entire university community, W&M's efforts yielded a framework centered on three strategic goals and four targeted initiatives that convey clear focus and solid understanding of the key problems that W&M is positioned to solve as a university.

Here is an overview of Vision 2026 — a five-year plan in which we look forward to partnering with the Commonwealth, private sector, nonprofits, donors, and the entire W&M community to bring to life. To stay informed and to track the plan's progress, visit the [Vision 2026 website](#).

GOALS

The strategic framework rests on the following goals:

- Expand William & Mary's Reach
 - The university will address global challenges, forge dynamic partnerships to fuel positive change and model democratic ideals to extend its influence in the world.
- Educate for Impact
 - The university will reimagine the liberal arts and professional education in the 21st century to ensure the lifelong success of our graduates.
- Evolve to Excel
 - W&M will embrace change to achieve our full potential in environmental and financial sustainability; in diversity, equity, and inclusion; and in operational excellence and efficiency.

INITIATIVES

In the next five years, W&M will build on the university's strengths and focus efforts on four cornerstone initiatives — which are pan-university and transcend the goals — of significant national and global impact:

1. Data: William & Mary will lead the evolution of the liberal arts and sciences by integrating computational thinking and data fluency into a bold and dynamic learning experience that advances inquiry, discovery, and innovation.

Vision 2026 will enable William & Mary to ...

- Prepare students to lead in a data-rich world.
- Become thought leaders at the intersection of computational and data sciences and the multitude of disciplines that study human societies, culture, and experiences — including the humanities, social sciences, arts, education, law, and business.

- Develop a research portfolio that builds on the emerging confluence between data analysis and a broad range of liberal arts and sciences to advance discovery and innovative design.
- Foster an entrepreneurial mindset, priming the campuses and region for data science innovations through stronger connections with Commonwealth, federal and corporate partners.

2. Water: William & Mary will be a world leader in finding innovative solutions to ensure the resilience of the world's oceans, coasts, and waterways.

Vision 2026 will enable William & Mary to ...

- Lead the innovation of adaptation and conservation strategies and solutions that will enhance coastal Virginia's resilience — and the communities, economies, industries, and environments that rely on them — via research and analysis, education, advisory service, and collaborative implementation efforts.
- Support and strengthen connections among W&M research, education, advisory service, external partnerships, and community engagement to foster success and extend W&M's global impact.
- Enhance existing academic programs, develop new undergraduate programs and certificates, and grow enrollments in marine, conservation, and environmental sciences.
- Develop a signature public science center and curriculum to create opportunities for current students and the next generation of global professionals and scientists.

3. Democracy: William & Mary will lead essential efforts to practice and promote democratic ideals in the pursuit of a more perfect union.

Vision 2026 will enable William & Mary to ...

- Elevate W&M's voice in local, national, and global conversations to uphold the democratic ideals and institutions in the 21st century.
- Generate and disseminate research that fosters reconciliation, produces inclusive histories, and models ways to engage local communities in this endeavor.
- Strengthen W&M's academic offerings through effective integration of civics education, American history, and worldwide democracy in the student experience, thereby attracting new and more diverse cohorts of students.
- Partner with Indigenous and Black descendant communities, and our entire W&M community, to create a model for a more inclusive and just society.

4. Careers: William & Mary will lead in the preparation of lifelong learners equipped to navigate rapid change and thrive from their first job to their last.

Vision 2026 will enable William & Mary to ...

- Lead the nation's selective liberal arts and sciences institutions in applied learning opportunities to prepare every W&M for the jobs of today and tomorrow.
- Cultivate and retain exceptional talent for our Commonwealth and nation.
- Mobilize W&M's worldwide network of alumni, employer, and parent partners to broaden learning experiences and career pathways for graduates and support a lifetime of professional success.
- Create innovative curricular pathways to credentials in high demand skills and fields, such as summer "jump-start" minors.
- Guarantee a funded internship opportunity or other applied learning experience for every undergraduate.

Alignment with State Goals

W&M's mission, vision, and values, along with the strategic vision outlined in *Vision 2026*, are consistent with the Commonwealth's themes and goals of providing equitable, affordable, and transformative education. Specifically, W&M is committed to each those themes in the following ways:

Equitable: Renewed Focus on Low-Income and First-Generation Students

W&M remains committed to providing funding to meet the financial need of in-state undergraduates. Over the last two years, W&M has targeted efforts to increase the Pell-eligible student population and other first-generation, low-income students. In the fall of 2020, W&M entered into a five-year partnership with the [Posse Foundation](#) to provide full scholarships to diverse cohorts of students, many of whom are first-generation students. W&M's partnership with Posse makes it the first university in the country to identify and enroll Posse Scholars (approximately 10 per year) from Virginia high schools. W&M also increased support for all first-generation students in Fall 2020 through the creation of a new support program, the First-Generation Low-Income (FGLI) student organization. Close to 200 W&M faculty and staff serve as mentors to these students with the Office of Student Engagement & Leadership providing programming, advising, and workshops for additional support. Furthermore, beginning with applicants for entry in Fall 2021, any in-state student who self-identifies as a first-generation college student or Pell-eligible student automatically receives an application-fee waiver. Although W&M already supported a wide variety of fee waivers, the automated process eases the process, ensuring the application fee does not create a barrier to access.

The number and percentage of Pell-eligible students is one measure of success in this area. W&M has increased its proportion of in-state Pell students to 17.1% for fall 2021. Unfortunately, higher costs for out-of-state students and the inability to offer comparable financial aid support relative

to what W&M offers in-state undergraduates makes it far more difficult to enroll out-of-state Pell students, thus bringing the overall Pell percentage for the entire student body down to 12.4%.

Beyond access, W&M's most recent graduation rate for undergraduates receiving Pell grants was 90%, which is the highest among public universities in the Commonwealth. The overall graduation rate for Pell-grant recipients enrolled at four-year public universities in Virginia was 62%.

Affordable: No Increase to In-State Tuition for Five Years (since Fall 2018)

Affordability remains paramount in the university's budget deliberations, evidenced by W&M's commitment to **holding in-state undergraduate tuition flat since Fall 2018** and the university's more than doubling of need-based financial aid in the last decade. W&M's Board of Visitors has intentionally held tuition flat for in-state students and kept fee increases as low as possible while covering mandated cost increases. Notably, W&M's ability to hold tuition flat has been highly dependent on significant increase in state general fund support over the same time period.

As a result of the commitment to financial aid for Virginians, according to the most recently available data from the Integrated Postsecondary Education Data System, in-state students who qualify for aid and come from **households at or below an income level of \$110,000 will pay and borrow less on average to attend W&M than they would for any other four-year public university in the Commonwealth.**

What families actually pay (net price) is what William & Mary tracks most closely. Unlike full price, net price includes only the amount a family actually pays or borrows after receiving W&M scholarships. Looking broadly across all income levels, **W&M has the lowest average net price based on total cost of attendance of all public doctoral institutions in Virginia.** Based on FY21 data – the most recent year for which data are available nationally – W&M's average net price for families with financial need, regardless of income, was just under \$18,400. At that level, W&M has a lower net price than JMU, GMU, VCU, UVA, and VT.

For FY23, W&M's Board of Visitors has chosen once again to hold tuition flat for all general undergraduate and graduate students, regardless of residency. W&M does not anticipate it will be able to hold tuition flat indefinitely but has a demonstrated track record over the last five years of using tuition as the last lever we pull. Our updated Six-Year Plan reflects no tuition increase for FY23 and a proposed increase of 3.7% in FY24 based on the incremental nongeneral fund revenue required after factoring in enrollment growth to cover the institutional share of the 5% salary increase included in the 2002-24 biennial budget.

The objective over the next year will be to reduce the potential increase, if possible, by:

- Continuing to focus on optimizing W&M's curricular offerings based on student demand and workforce needs,
- Reducing costs through efficiency gains and outsourced solutions, and

- Identifying new sources of revenue through a combination of innovative program offerings, collaborations with other Virginia public institutions, partnerships with private industry, sponsorships, and fundraising.

Transformative: Improving Career Pathways.

W&M was ranked by the *Princeton Review* as the [best public school for internships](#) in 2021. Building on that strength, W&M has been working closely through the Council of Presidents and in coordination with SCHEV and other leaders in Richmond to identify opportunities for all undergraduate students to participate in relevant work experiences through internships or experiential offerings before they graduate.

Research shows that a key success factor for new graduates in landing their first job is access to paid internship or experiential learning opportunities. According to Gallup, recent graduates who had an internship during college were more than twice as likely to have a good job waiting for them upon graduation (42%) compared to graduates who didn't have an internship (20%). W&M seeks to introduce even greater and more impactful experiential learning opportunities for students with expanded co-op education arrangements. Although W&M has not yet included this as a general fund request, the university hopes the Commonwealth will partner with W&M as this concept evolves, providing funding and access to critical work and learning opportunities.

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.**

Tuition and fee increases for FY23 have been updated to reflect the Board of Visitors actions. For FY24, W&M accounts for the 5% salary increase included in the 2022-24 biennial budget, anticipated growth in tuition revenues due to planned enrollment growth, and funding of institutional mission and priorities based on initiatives core to *Vision 2026*. W&M has assumed that state general fund support will be consistent with the 2022-2024 Appropriation Act, recently signed by the governor. See Section D for information on the calculation of projected revenue.

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.

Tuition revenue projections are based on historical revenue trends updated for planned enrollment growth. W&M has updated FY23 projections to include no tuition increase for the upcoming academic year and has assumed a 3.7% tuition increase for FY24. Although a 3.7%

increase will not fully cover the nongeneral fund share of the state-mandated salary increase for FY24, W&M anticipates through enrollment growth and continued internal reallocations that the university will be able to balance the FY24 budget. Other NGF is fairly consistent from year-to-year, with increased fee revenue driven primarily by enrollment growth. Revenue from non-E&G fees and other auxiliary services are estimated in a similar manner, using historical fee revenue trends in combination with enrollment projections.

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.

W&M received funding for two of its five prior requests, notably incremental base funding to replace one-time funds previously provided in FY22. The governor and General Assembly replaced those funds with ongoing base support and increased overall general fund support for E&G by an additional \$2.6 million. (See details in the GF Request tab). In addition, Chapter 2, 2022 Special Session, Virginia Acts of Assembly, includes \$2.5 million in one-time funding to support the relocation of the Bray School to Colonial Williamsburg and ongoing state support for William & Mary’s continued research on the historical contributions of the Bray School (See details in the GF Request tab.)

GF Request 1: Increase Financial Aid for Pell-Eligible Students. As mentioned throughout this plan, W&M continues to prioritize financial aid as part of its internal budget allocations. Need-based aid and scholarships remain two of the highest priorities, both in establishing annual budgets and in fundraising. The recent allocation of \$25 million GF statewide in FY24 to “enhance efforts to recruit and retain students eligible for Pell-grant assistance at public institutions of higher education” is a significant step forward. In the coming year, W&M will work with SCHEV to determine how W&M might participate in this program. With an additional \$1.2 million GF support from the Commonwealth, we would be able to enroll 200 more in-state Pell-eligible students, both freshman and transfer, further expanding access to a W&M education.¹

GF Request 2: Increase faculty in computer science, data science, and applied computational engineering. Over the last decade, W&M has seen student and employer demand for degrees in computer and data science expand dramatically. The university has tripled the number of computer science degrees awarded annually and in 2021 began offering a bachelor’s degree in data science. Among all majors, demand for computer and data science classes has soared. W&M has also seen a shift in physics majors, who increasingly seek engineering physics and applied design tracks.

¹ Although W&M has previously requested funding for this item, given the \$25 million statewide pool appropriated in FY24 (Chapter 2, Acts of Assembly), W&M did not submit a separate budget request to DPB this fall. W&M will work with SCHEV as it develops allocation criteria in hopes that those criteria would be inclusive of this request for funds to be allocated in FY24.

Between 2016 and 2020, computational science degrees grew by over 600% nationally while remaining virtually flat in the Commonwealth and within the region. In addition, data modeling and data science degrees grew by more than 1,200% nationally, while declining in Virginia and the region (Source: 2022 Kennedy & Company Education Strategies, LLC).

Clearly, there is unmet need in these fields. W&M is uniquely positioned to increase its already growing presence in this area by elevating computing and data science as a focal area for the university. This initiative will enable better support of and seamless interaction between the current programs, and will allow W&M to expand existing programs, and grow new programs that merge the fundamental communications and problem-solving skills of a liberal arts education with the technical skills in high demand among Virginia's employers. The initiative also complements W&M's interest in establishing a Data Innovation Hub (d-HUB) to catalyze economic development in the region. For FY24, W&M requests \$1 million GF in base funding to support 5 faculty FTE in computer science, data science and computational engineering. By 2026, W&M expects to grow faculty in these areas by 15 FTE.

GF Request 3: Expand Jump-Start Data Science Program. In Summer 2020, W&M established the Jump-Start Data Science Program as part of an accelerated minor in Data Science, allowing students to complete the majority of the Data Science minor over the summer. The program affords students the opportunity to accelerate learning, connect with employers, and build competencies that enable them to jump-start their careers. The Jump Start program responds directly to the Commonwealth's workforce needs, and student interest has been overwhelming. In Summer 2021, W&M initiated a second such program in eSports, building skills in data science, communication, business, and education. W&M envisions expanding these popular summer programs in a variety of areas as the university continues to identify innovative paths to providing students workplace skills that complement and enhance their learning in the liberal arts and sciences. W&M requests \$400,000 GF annually in ongoing funds to further develop programs that will generate student interest in the summer semester and grow enrollment.²

Balancing the Budget

In addition to incremental general fund support provided by the Commonwealth in FY23 and requested in FY24, William & Mary continues to prioritize its nongeneral fund resources through routine reallocations, focus on cost containment, and efficiency gains. We intentionally focus resources to ensure that it provides students with an exceptional academic experience while continuing to invest in the programs, people, and infrastructure that are critical to delivering that experience to our students.

Given no growth in undergraduate tuition rates, incremental new revenue has come from planned enrollment growth and modest increases in our graduate and professional programs. William & Mary continues to improve efficiencies and adopt innovations and partnerships to increase revenues, but the university is also making difficult and conservative choices in priorities.

²Based on guidance provided by the Office of the Secretary of Education, W&M has deferred its request for funding through the Governor's budget process this fall.

As detailed in the financial plan for the biennium, incremental tuition revenue for FY23 totals \$3.1 million as a result of enrollment growth. In order to balance the FY23 budget, we have allocated incremental general fund support along with nongeneral fund reallocations to:

- support the state-mandated salary increase for faculty and staff,
- increase minimum wage for our lowest paid employees to \$15.50 per hour in order to remain competitive with local public and private sector employers,
- expand student services and academic support functions as a result of enrollment growth; and
- make initial investments in Vision 2026, notably in the area of student career services

W&M Priority 1: Increase the university's commitment to provide need-based grant aid to low- and middle-income Virginians. Consistent with the state's goal on affordability, W&M remains committed to providing need-based aid to in-state undergraduates. With an anticipated 3.7% tuition increase in FY24, W&M anticipates needing to invest an additional \$1.5 million NGF in FY24 to meet current levels of need.

W&M Priority 2: Expand key STEM offerings. With an eye toward 2026, W&M is looking to strengthen and broaden its academic programs as a comprehensive, R2 doctoral university by (a) creating a programmatic focus structure in computing and data science that elevates and expands current programs in these STEM fields of high demand by students and employers, as expected at a university of the stature of W&M; and (b) by bridging the divide between STEM fields and the humanities and social sciences through novel interdisciplinary programs at the intersection of society and technology that address relevant evolving challenges and needs. As part of the university's commitment to the state's Tech Talent Pipeline Initiative, W&M continues to expand in computing and the computational sciences in general. Student and employer demand in applied science, data science and engineering design are driving curriculum alignment that will expand opportunities in those areas. W&M also continues to explore opportunities in multidisciplinary areas of national and global impact, such as integrative conservation and, recognizing growing student interest, in eSports – an arena of technology and design preparing students well for high-impact employment. W&M plans to invest \$1.1 million NGF in FY24 with a goal of providing an additional \$1 million in subsequent years. Those funds, coupled with the requested general fund support for 15 new faculty FTE by 2026, will grow overall investment in STEM programs by more than \$5 million over the next four fiscal years.

W&M Priority 3: Continue to invest in competitive faculty and staff salaries. The 5% merit increases included in the 2022-24 Appropriation Act recognize the importance of providing competitive salaries for all employees. W&M's updated plan reflects the institutional resources needed to provide merit increases as well as to maintain a competitive minimum wage that allows W&M to attract and retain a critical portion of our workforce. The revised financial plan includes \$7.5 million NGF faculty and staff compensation in FY23 and an additional \$6.3 million the following year to address the university share of the 5% merit increase, increase minimum wage, and provide targeted market adjustments.

W&M Priority 4: Expand historical and cultural research to tell a more inclusive history. In 2009 W&M established the Lemon Project, an initiative that contributes and encourages scholarship on the 300-year relationship between African Americans and W&M. The work has created opportunities for W&M to create and deepen its connections to Williamsburg and the greater Tidewater area.

W&M seeks to build on this important work in the region and to position the Commonwealth as a national model for broadening and deepening dialogue around the origins of democracy as the United State approaches 2026, the 250th anniversary of the nation's founding. One important facet of that work is the recently announced partnership between William & Mary and the Colonial Williamsburg Foundation, through which W&M will restore, relocate, and research the historic Bray School, believed to be America's oldest extant schoolhouse for African Americans. This joint project will transform traditional accounts of America's history into a multi-layered story that centers Black nation-builders at the heart of U.S. democracy. In addition to the state's investment in relocating the Bray School and funding to support research teams to study the Bray School and other similar projects, the revised financial plan reallocates approximately \$179,000 NGF to support the cost of personnel to oversee and support these important initiatives. The university and Colonial Williamsburg Foundation also continue to pursue philanthropic support and grant funding to support these efforts.

W&M Priority 5: Base fund academic and student support functions and teaching capacity impacted by enrollment growth. W&M adopted an intentional plan to grow undergraduate enrollment over a four-year period, recognizing that a sustainable financial model considers all sources of revenue. Growth in the first two years was higher than initially anticipated, helping the university to hold tuition flat, but also accelerating needs in offices that support student academic success. The university invested resources from that growth in teaching capacity for its COLL curriculum, student accessibility services, academic advising, registrar staffing, and university admissions, among other offices. The revised financial plan includes \$3.3 million NGF in reallocated base support for these efforts.

W&M Priority 6: Leverage university libraries to meet growth in research and enrollment. W&M continues to see strong demand from students, faculty, and local community members for library resources collections and services. Early in this century, many anticipated that libraries might become obsolete as more and more materials became available online. W&M has been at the forefront of digitization and has invested in partnerships with higher education institutions across Virginia to ensure that primary materials preserved in libraries and archives, and research produced by Virginia institutions, are accessible to scholars worldwide. Investing in the spaces and programs housed within our libraries, which have become important centers for fostering collaboration and shared problem-solving across all of our academic disciplines, is a priority. Even in an era of constrained resources, W&M continues to reallocate existing resources to support the heart of the campus. The revised financial plan includes approximately \$500,000 NGF in reallocated base support for these efforts.

W&M Priority 7: Expanding information technology (IT) infrastructure. COVID-19 underscored the importance of technology in supporting learning, research, and operations at W&M. Under the direction of a new chief information officer, W&M will allocate resources and seek strategic regional partnerships allowing enhancement of high-speed computing capabilities, maintenance of a robust information security program, and creation of operational efficiencies through the better use of technology to support the administrative functions of the university. In the revised plan, W&M does not anticipate increased base funding for IT. Instead, the university will shift to the use of one-time funds, when available, to help support investment in technology solutions that will improve operational efficiencies going forward. The revised financial plan includes approximately \$500,000 NGF in reallocated funds in FY24 for these efforts.

W&M Priority 8: Support key pillars of *Vision 2026*. In addition to targeted funding for data and computational sciences provided in W&M Priority 2, W&M will provide incremental funding to support student career services and internship placement, expand enrollment management to support W&M's accessibility goals, and position W&M to lead in conversations around the future of democracy in the nation and in the world. The revised financial plan includes \$3 million NGF in each year from new and reallocated sources to support these efforts.

W&M Priority 9: Supporting the operation and maintenance of new arts facilities coming online. Phases I & II of the Fine and Performing Arts Complex are scheduled to come online in January 2023, and the expansion of the Muscarelle Museum by late 2023. For planning purposes, the university has included the full cost of operation and routine maintenance (O&M) for these facilities in the appropriate fiscal year in this six-year plan but has also included the general fund share as a request. W&M anticipates the cost of O&M will be \$243,000 NGF in each year, \$486,000 overall.

W&M Priority 10: Cover the institutional costs of state-mandated increases in fringe benefits and other contractual obligations. W&M has set aside incremental nongeneral fund dollars as part of its academic-financial plan to fund rate increases related to employee health insurance, retirement contributions, or other fringe benefits required by the state. In addition, many of W&M's contracts, particularly facilities and equipment contracts, have annual cost escalators that require incremental funding if existing dollars cannot be reallocated. The revised financial plan includes \$1.8 million NGF in reallocated funds in FY23 to deal with unavoidable costs, including the impact of inflation, and an incremental \$1.7 million in FY24 above current fiscal year levels to support continued cost escalations in the second year of the biennium.

In addition to prioritizing limited new resources, W&M has a long track record of seeking innovations that result in reduced costs and/or opportunities to slow future spend. As a founding member of the Virginia Higher Education Procurement Cooperative (VHEPC), William & Mary has been one of the leading institutions in supporting statewide higher education cooperative contracts. In FY21, W&M saved over \$1.2 million in spend due to the use of VHEPC contracts. Through the statewide efforts of university libraries, Virginia public institutions saved \$4 million annually, with W&M's share being approximately \$250,000. Beyond cost savings, W&M is becoming more efficient by effectively leveraging technology to automate business processes

that have historically been manual. Those efforts often result in saved time rather than saved dollars, but they allow W&M to redeploy human talent to focus on higher priority work and/or reduce the need to add additional staff.

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?

W&M's submitted enrollment projections were developed based on the institution's three-year growth plan of new students (both undergraduates and graduates) along with average historical progression rates from year to year of each student level, factoring in retention and graduation rates.

Prior to the pandemic, William & Mary had begun a process for targeted, smart growth at the undergraduate level. Using the 2019-2020 baseline of 1,530 for new freshman enrollment in the fall, W&M established targets and pacing to gradually increase the number of new freshmen by 150, to a total of at least 1,680 by the 2023-2024 academic year, i.e., phasing in a gradual increase of 150 new freshman per year over a four-year period, and ultimately resulting in growth of 600 more undergraduates across the four-year enrollment.

The targets and pacing of this growth were set with an eye to what the applicant pool could support over time (especially with additional investment and cultivation) without degradations to academic quality or student diversity. W&M also gave additional and careful consideration to what the campus could accommodate without diminution of the experience in residence life, classroom experience, or personal attention.

One new component of the growth strategy is the offering of spring entry for new freshmen. Students graduating early (in less than eight semesters) and studying abroad (for which W&M has among the highest participation rate among all public universities in the country) creates capacity to enroll new students in the spring semester. (Given travel restrictions, students' ability to study abroad was significantly reduced during the pandemic. W&M is actively monitoring study abroad participation as these opportunities return.) Beginning in the 2020-2021 academic year, students on W&M's waitlist for fall entry had the option either to enroll at a two-year institution for the fall or to participate in a [Verto Education](#) program in the fall, each with the guarantee of transfer credit and admission to W&M for the spring as long as the students earn at least a 3.0 GPA in the fall and continue to meet high standards of personal conduct.

Increasing numbers of applicants accelerated the planned growth at W&M, which enrolled 1,684 first-time undergraduates for the fall 2021 semester. An additional 180 students enrolled during the spring 2022 semester via spring pathways, including the Verto Education partnership. In combination, the enrollment growth anticipated by 2023-24 has been achieved entering 2022-23. Moving forward, W&M will target 1,650 new first-time undergraduates enrolling each fall,

complemented by 100-150 transfer students each spring via pathway programs like the Verto Education partnership.

Through enrollment growth, W&M intends to ensure that four-year, undergraduate, in-state enrollment would be above the Fall 2018 full-time equivalent census levels as certified by the State Council of Higher Education for Virginia. Additionally, growth will facilitate increased degree production in high-demand areas, such as computer science, in support of W&M's commitments under the Tech Talent Agreement; enable the enrollment of more underserved students; and generate additional revenue to support institutional and Commonwealth priorities.

Beyond in-person enrollment increases at the undergraduate level, new online offerings are being explored and have been informed by the experience of shifting to remote modes of teaching during the pandemic. The W&M business and law schools in particular have interest in prospective online masters and certificate programs. W&M is in the final phase of an RFP process now for strategic partners in online and continuing education to augment internal capabilities for delivering such online programs and services.

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.

Over the last several years, W&M has moved into the online graduate degree market to address the growing need for working professionals to advance and adapt in their careers. Today, the university offers the following programs online or in a hybrid format, combining online and face-to-face instruction:

- Certificate in Military and Veterans Health, Policy and Advocacy
- Master of Business Administration
- Master of Science in Business Analytics
- Master of Science in Marketing
- Master of Science in Finance (New degree program)
- Master of Accounting (New online offering)
- Master of Law (LL.M.) (New online offering)
- Foundations in Business Analytics Certificate
- Master of Education in Counseling, with concentrations in Clinical Mental Health Counseling, School Counseling, and Military and Veterans Counseling
- Online Teacher Education Programs, and

- Executive Doctorate of Education (Ed.D.) in Educational Policy, with concentrations in Gifted Administration, Higher Education Administration, K-12 Administration, and School Psychology.
- Post-Professional Certificate in Gifted Education

Since our last update, W&M has established the following new certificate programs:

- Spring 2021 English as a Second Language
- Fall 2021 Educational Leadership
- Fall 2021 Reading Specialist
- Fall 2021 Special Education, K-6
- Fall 2021 Special Education, 6-12
- Fall 2022 Corporate Finance
- Fall 2022 Investment Management
- Fall 2022 Gifted Education
- Fall 2022 Grad Cert Data and Computer Sciences (pending approval)
- Spring 2022 Graduate Certificate in Gifted Education
- 2022 Real Estate Finance (withdrawn)

W&M plans to offer an undergraduate degree in Marine Science in the near term. W&M has also discontinued offering its College Teaching Certificate.

W&M also expects to expand its reach in the Washington, D.C.-metro area with the relocation of the W&M Washington Center to a more prominent location in downtown D.C. in the D.C. Bar Association Building.

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.

W&M remains committed to meeting the financial need of in-state families:

- For in-state families with incomes below \$110,000, W&M has the lowest average personal net price among all four-year public universities in Virginia, according to the Integrated Postsecondary Education Data System.
- W&M continues to grow its population of Pell recipients and is now at 17.1% of in-state undergraduates.

- Students from families with incomes at or below \$40,000 receive a grant aid package up to their full demonstrated financial need, with no loan or work component.

William & Mary has prioritized setting aside funding to maintain this level of commitment to in-state students with financial need through both increases to E&G funding sources as well as expansion of private funding sources targeting students with financial need.

As noted above, regardless of income, W&M remains the most affordable public doctoral institution in the Commonwealth for families needing aid.

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.

The university continues to assess its capital needs on a regular basis. While W&M is still analyzing the impact of the pandemic, it is clear that in-person learning and living are at the heart of the university’s success and advancement of student access. To continue to deliver the high-quality educational product for which William & Mary is known, it will continue to remain a largely residential campus with a primary focus of on-campus teaching and research.

Preserving William & Mary’s Historic Campus in its Fourth Century
Cost TBD

In November 2021, W&M and the Colonial Williamsburg Foundation (CWF) entered into a long-term agreement to have CWF advise the university on how best to maintain and preserve – for continuous use – the treasures of our ancient campus. These include the Wren Building, the Brafferton, the President’s House, and the Wren Dependencies. W&M continues to work through the initial assessments of these buildings, which include the oldest higher education facilities in the country.

A number of urgent preservation needs have become clear. The roof of the iconic Wren Building (dating to the 1930s) will need to be replaced very soon. In addition, the continuous use of the President’s House has strained the building fabric and systems, creating maintenance issues that require W&M to think about how best to preserve that historic and beloved building for the next century and beyond.

Renovate: Ewell Hall
\$30,000,000 GF

Consistent with W&M’s capital plans for more than a decade, Ewell Hall – one of the historic academic buildings at the heart of campus – requires significant renovation. With the completion of Fine & Performing Arts Phase 1 & 2 expected in spring 2023, we will vacate most of Ewell Hall, allowing W&M to address significant building systems issues, and modernize classroom and administrative space that supports key programs within Arts & Sciences and the Reves Center for International Studies.

This project includes long-overdue renovations to update life safety and other building systems, achieve current building code compliance, ensure full accessibility, and reconfigure the interior to suit future use. The building, largely occupied by the Music Department, will become partially vacant when music moves to its new home in the Fine & Performing Arts Quarter. The vacancy provides an opportune time to complete necessary renovations to the building with the least disruption to campus.

Maintenance Reserve Program

State funding to support the renovation and revitalization of aging E&G facilities is essential to ensure that the physical plant can be utilized efficiently and effectively. This has become even more critical as the university works toward becoming carbon neutral by 2030. In addition, ongoing support through the maintenance reserve program ensures that William & Mary is able to address essential repairs to E&G facilities, thus extending their useful life.

Campus Spaces Master Plan

During this six-year plan period, the university intends to launch its next campus master plan. The most recent master plan, completed in 2015, provided an excellent framework for strategic capital investments. The next master plan will incorporate components of a recently completed housing and dining master plan and an upcoming learning spaces master plan.

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.

- **Employee Compensation.** The flexibility provided to W&M and other Tier III institutions to provide salary increases with institutional funds has been essential to the university’s success over the last decade. As the number of classified employees continues to shrink at W&M, the university would welcome the ability to bring classified employees under the university’s staffing structure. Maintaining two different staffing models has become increasingly burdensome and inefficient, as the number of classified employees has dropped to fewer than 125, or less than 10% of W&M’s overall staff. In addition, it has created different compensation structures for employees, sometimes doing the exact

same work. Having the ability to convert all classified employees to staff positions within the university system of human resources would allow W&M to manage its workforce more effectively.

- **Tuition Management.** Tuition management maintains an essential role of the Board of Visitors. Recent increases in state support have allowed the university to hold tuition flat for in-state, undergraduate students. However, tuition requires a complex assessment of the institution’s overall financial management, strategic goals, access goals, and market position. (See Section B above.)
- **Expedited Program Approval.** W&M continues to adopt more innovative and flexible academic offerings for the summer as part of its approach to enable and foster truly transdisciplinary learning. It is anticipated that the student summer workload will be structured based on a customizable program framework that includes course modules from a variety of disciplines rather than standard 15-week semester courses. As W&M looks to develop these new transdisciplinary and multimodal programs that include not only coursework but also fully integrated experiential learning opportunities, W&M requests flexibility and expedited SCHEV program review, where applicable.
- **Revisit eVA Transactional Fee Assessments.** Consider implementing an annual eVA fee, which will allow for a set fee structure for covered institutions not utilizing eVA as a front-end procurement tool. After initial implementation, eVA support to the institutions is minimal – the integrations will be completed, and purchase order data transfer provided nightly by W&M. Vendor transaction fees will still be able to be recouped from eVA due to the data transfer.
- **Review Elimination of Requirement to Post Business Opportunities, Solicitations, and Sole-Source Purchases.** If not required, each institution has the ability to determine whether additional efforts to post in both areas will provide added value to the procurement process.

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.

In its 2020-2026 Six-Year Plan, submitted pre-pandemic in 2019, W&M set forth the following priorities:

Priority 1: Maintain the university’s commitment to provide need-based grant aid to low- and middle-income Virginians. As described in Section A and H, W&M has delivered on its goals to provide affordability and access to Virginia students. Funding to support incremental need-based financial aid has remained the top priority for the university since the plan was adopted.

Priority 2: Continue to support competitive faculty salaries based on merit. With generous support from the Commonwealth, W&M was able to implement 3% across-the-board increases in FY20 for faculty and provide a 2% across-the-board combined with 3% merit-based pools in FY22. No increases were provided in FY21 as the institution navigated the financial impact of the pandemic.

Priority 3: Provide competitive staff salaries. Staff salaries increased by comparable percentages to faculty in FY20 and FY22, with the exception of W&M's remaining state classified employees, who received the increases as outlined in the Appropriation Act for those years (2.75% across the board and 2.25% merit in FY20 and 5% in FY22).

Priority 4: Reallocate existing resources and increase funding to support the operations of the new Studio for Teaching & Learning Innovation (STLI). The university created the STLI by repurposing existing resources campus-wide. As previously discussed in Section A, the Studio was a pivotal resource in the university's ability to quickly shift instructional delivery in response to COVID-19.

Based on STLI's success in transforming teaching at W&M, the university still desires to establish a dedicated physical space for the studio in order to scale up its impact. The Studio offers faculty, students, and staff from across disciplines opportunities to collaborate with one another and learn about diverse modes of teaching and learning and new technologies. STLI collaborates with academic and administrative units to bolster its position as an interdisciplinary, broad-based unit dedicated to strengthening the overall learning environment at W&M through collaboration and innovation.

Priority 5: Expand internship opportunities for students, particularly those in computer science-related fields. Although the pandemic slowed W&M's progress on this priority, as described in Section E above, W&M's focus on providing meaningful work experiences for all undergraduate students will place this among the top priorities over the next five years.

Priority 6: Launch a professional master's program in computer science. W&M requested state funding for this program as part of its Tech Talent Pipeline proposal. Although the state provided funding for W&M to expand undergraduate degrees in computer science, it did not fund a new professional master's program in this area. Without state funding support, and with the pandemic constricting available resources to support multi-year commitments, this initiative has not moved forward. Data science, computer science and other STEM programs continue to be a focus for available resources related to student demand and also to support the workforce goals of the Commonwealth. Computer Science continues to assess certificates and other options to address student demand.

Priority 7: Provide competitive stipends for graduate students, particularly in STEM-related disciplines. W&M has provided additional funding to graduate schools for stipends. This continues to be an area monitored against the university's peers. In addition, for the upcoming academic year W&M will begin a pilot program to help defray the cost of health insurance for

graduate students. These efforts have been enhanced by the recent general fund support provided by the Commonwealth.

Priority 8: Invest in information technology (IT) infrastructure. The pandemic highlighted the importance of solid IT infrastructure; investments will be needed to maintain and improve. Much of IT's focus over the past year and a half has been supporting the move to hybrid and online learning. As discussed in Section E, IT infrastructure continues to be a priority that will shift toward more strategic, and less responsive, avenues in the coming years.

Priority 9: Enhance regional development and entrepreneurship. W&M prides itself on partnering with surrounding localities to address areas of common interest. W&M has established the Launchpad to serve as an entrepreneurship hub and partnership between James City County, York County, the City of Williamsburg, and W&M. The Launchpad facilitates a network of entrepreneurs, mentors, educators, and industry experts. The cooperation facilitates entrepreneurs working alongside their peers, partners, customers, and investors, gaining from the vast knowledge the different groups contribute to the network, and offering their own expertise.

In addition, the Raymond A. Mason School of Business formed a partnership with the Hampton Roads Small Business Development Center to provide consulting services to small business owners in the region through a new student-led organization called the CrimDell Small Business Network. The work, launched in May 2020, has focused specifically on COVID-19 relief. This partnership benefits the community while providing a valuable educational experience for W&M students. CrimDell has helped over 50 small businesses across nine counties in the Greater Williamsburg area, 86% of which are minority-owned.

The W&M School of Education partnered with Williamsburg-James City County Public Schools (WJCC) during the pandemic to deliver a virtual tutoring program. W&M students in the Virtual Learning Partner program gain valuable experience while WJCC students K-5 gain mentors at a critical time. Every year, the W&M School of Education places many of its students in local schools for field experiences, while student-run service organizations train and match undergraduate students with local elementary and secondary students for tutoring. The Virtual Learning Partner program was designed so that volunteers commit to meet with their assigned tutee for at least one hour per week via Zoom or phone and write a weekly reflection of their experience. In the fall semester, the project matched 100 W&M students to local K-5 students for virtual tutoring.

Priority 10: Provide funding to keep pace with library acquisition costs. As with other items on this list, W&M did not increase funds in FY21 or FY22 to support library acquisition costs – due to holding tuition flat and the impact of the pandemic.

Priority 11: Support the operation and maintenance of new facilities coming online. Additional funding has been allocated as needed to support the operation of the new West Utility Plant. W&M examines its existing operational resources dedicated to facilities management in determining the need for additional funding when adding new facilities.

Priority 12: Cover the institutional costs of state-mandated increases in fringe benefits and other contractual obligations. W&M covered the cost of fringe benefit increases, student minimum wage increases, and contractual costs mostly through the reallocation of existing resources and support from general fund resources.

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.

W&M’s DEI Strategic Plan has been submitted to the Commonwealth’s Chief Diversity Officer as required; by design, it aligns directly with the One Virginia plan. A copy has been included and more information on the university’s commitment to inclusive excellence can be found at [DEI Plan](#). As part of that plan, W&M is completing a diversity assessment this summer that will identify barriers to belonging and provide a roadmap for advancing the university’s DEI initiatives.

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

W&M does not produce a separate annual report on economic development contributions. As indicated in the response to W&M’s Priority 9 in Section K, we work closely with surrounding localities drive economic growth in the region. These efforts are in addition to the jobs and economic activity generated by normal everyday operations. See page 15 of the [Greater Williamsburg Partnership’s 2020 Annual Report](#).

Section N. Freedom of Expression

William & Mary is a community in which the ideals of freedom of inquiry, thought, and expression are respected and sustained. The university is committed to supporting the exercise of constitutionally protected expression in university-controlled facilities and property while maintaining a safe atmosphere free from disruption. Consistent with the university’s mission to “create a learning environment where teaching, research and public service are linked through programs designed to preserve, transmit, and expand knowledge,” a commitment to free expression is essential to fostering open discourse, argumentation, speaking, listening, learning, and exploration of ideas.

W&M’s relevant policies and materials concerning freedom of expression (including our process for reporting disruptions of constitutionally protected speech and our annual report of campus freedom of expression) are published [here](#). The university will integrate civil discourse training

into its Student Transition Engagement Programs as part of the university's [Democracy Initiative](#), one of four key components of W&M's Vision 2026 strategic plan.