

**Six-Year Plans (2023): 2024-25 through 2029-30**

**Due: July 17, 2023**

**Institution:**

George Mason University
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**Institution UNITID:**

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**Individual responsible for plan**

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## Part 1: Undergraduate Tuition and Mandatory Fee Increase Plans in 2024-26 Biennium

### George Mason University

**Instructions:** Provide annual planned increases in undergraduate tuition and mandatory E&G fees and mandatory non-E&G fees for both in-state and out-of-state students in 2024-26 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.

	Undergraduate Tuition and Mandatory Fees				
	2023-24 Charge (BOV approved)	2024-25		2025-26	
		Planned Charge	% Increase	Planned Charge	% Increase
In-State UG Tuition	\$10,095	\$10,600	5.0%	\$11,130	5.0%
In-State UG Mandatory E&G Fees			%		%
In-State UG Mandatory non-E&G Fees	\$3,720	\$3,906	5.0%	\$4,179	7.0%
<b>In-State UG Total</b>	<b>\$13,815</b>	<b>\$14,506</b>	<b>5.0%</b>	<b>\$15,309</b>	<b>5.5%</b>
Out-of-State UG Tuition	\$34,259	\$35,972	5.0%	\$37,771	5.0%
Out-of-State UG Mandatory E&G Fees			%		%
Out-of-State UG Mandatory non-E&G Fees	\$3,720	\$3,906	5.0%	\$4,179	7.0%
<b>Out-of-State UG Total</b>	<b>\$37,979</b>	<b>\$39,878</b>	<b>5.0%</b>	<b>\$41,950</b>	<b>5.2%</b>

**Part 2: Revenue: 2022-23 through 2029-30**  
**George Mason University**

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.  
 In line 25, enter E&G GF revenues for the current biennium. The formulas will automatically hold that constant for the remaining years.

NOTE: In light of ongoing budget negotiations, please complete the template assuming only what has already been signed into law as the baseline 2022-23 and 2023-24 appropriation. In the event that a new budget results in additional funding for institutions in 2023-24, OpSix will provide guidance at that time on whether and how to modify or resubmit plans.

Instructions: Provide a pro forma analysis of total tuition revenue in years 2026-2030 by holding T&F constant at the planned 2025-26 rate while incorporating your institution's submitted enrollment projections for each year through 2030. These columns are NOT meant to be a projection and do NOT make any assumption about GF support. The calculations will be used to support the pro forma analysis in tab 5.

Items	2022-2023 (Actual)			2023-2024 (Estimated)			2024-2025 (Planned)			2025-2026 (Planned)			2026-2027 (Pro Forma)			2027-2028 (Pro Forma)			2028-2029 (Pro Forma)			2029-2030 (Pro Forma)			2022-2030 Chg	CAGR			
	Total Collected Tuition Revenue	Total Collected Tuition Revenue	Chg	Total Projected Tuition Revenue	Chg	Total Projected Tuition Revenue	Chg	Total Calculated Tuition Revenue	Chg	Total Calculated Tuition Revenue	Chg	Total Calculated Tuition Revenue	Chg	Total Calculated Tuition Revenue	Chg	Total Calculated Tuition Revenue	Chg	Total Calculated Tuition Revenue	Chg										
<b>E&amp;G Programs</b>																													
Undergraduate, In-State	\$188,483,012	\$193,081,394	2.4%	\$202,353,687	4.8%	\$212,069,506	4.8%	\$215,475,240	1.6%	\$219,310,129	1.8%	\$223,203,516	1.8%	\$227,156,298	1.8%	\$231,049,685	1.7%	\$234,942,072	1.7%	\$238,834,459	1.7%	\$242,726,846	1.7%	\$246,619,233	1.7%	\$250,511,620	1.7%	%	2.7%
Undergraduate, Out-of-State	\$150,506,880	\$157,844,002	4.9%	\$167,640,241	6.2%	\$178,101,889	6.2%	\$180,897,639	1.6%	\$183,695,598	1.5%	\$186,536,224	1.5%	\$189,420,173	1.5%	\$192,304,122	1.5%	\$195,188,071	1.5%	\$198,072,020	1.5%	\$200,955,969	1.5%	\$203,839,918	1.5%	\$206,723,867	1.5%	%	3.3%
Graduate, In-State	\$44,986,667	\$43,036,179	-4.3%	\$44,260,089	-2.8%	\$45,684,616	3.2%	\$46,920,983	2.7%	\$47,855,942	2.0%	\$48,805,176	2.0%	\$49,768,904	2.0%	\$50,732,632	2.0%	\$51,696,360	2.0%	\$52,660,088	2.0%	\$53,623,816	2.0%	\$54,587,544	2.0%	\$55,551,272	2.0%	%	1.5%
Graduate, Out-of-State	\$77,656,622	\$88,741,783	14.3%	\$94,450,276	6.4%	\$100,543,893	6.5%	\$102,294,484	1.7%	\$104,055,230	1.7%	\$105,842,796	1.7%	\$107,657,592	1.7%	\$109,492,388	1.7%	\$111,347,184	1.7%	\$113,221,980	1.7%	\$115,116,776	1.7%	\$117,031,572	1.7%	\$118,956,368	1.7%	%	4.8%
Law, In-State	\$7,068,139	\$7,235,268	2.4%	\$7,694,016	6.3%	\$8,185,579	6.4%	\$8,315,654	1.6%	\$8,447,713	1.6%	\$8,581,787	1.6%	\$8,717,907	1.6%	\$8,854,027	1.6%	\$8,990,151	1.6%	\$9,126,275	1.6%	\$9,262,399	1.6%	\$9,398,523	1.6%	\$9,534,647	1.6%	%	3.0%
Law, Out-of-State	\$20,688,679	\$22,190,041	7.3%	\$23,619,331	6.4%	\$25,151,862	6.5%	\$25,577,133	1.7%	\$26,008,887	1.7%	\$26,447,223	1.7%	\$26,892,244	1.7%	\$27,337,265	1.7%	\$27,782,286	1.7%	\$28,227,307	1.7%	\$28,672,328	1.7%	\$29,117,349	1.7%	\$29,562,370	1.7%	%	3.8%
Medicine, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Medicine, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Dentistry, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	23%
Dentistry, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	30%
PharmD, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	-19%
PharmD, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	17%
Veterinary Medicine, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Veterinary Medicine, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
First Professional, In-State (Total)	\$7,068,139	\$7,235,268	2.4%	\$7,694,016	6.3%	\$8,185,579	6.4%	\$8,315,654	1.6%	\$8,447,713	1.6%	\$8,581,787	1.6%	\$8,717,907	1.6%	\$8,854,027	1.6%	\$8,990,151	1.6%	\$9,126,275	1.6%	\$9,262,399	1.6%	\$9,398,523	1.6%	\$9,534,647	1.6%	%	3.0%
First Professional, Out-of-State (Total)	\$20,688,679	\$22,190,041	7.3%	\$23,619,331	6.4%	\$25,151,862	6.5%	\$25,577,133	1.7%	\$26,008,887	1.7%	\$26,447,223	1.7%	\$26,892,244	1.7%	\$27,337,265	1.7%	\$27,782,286	1.7%	\$28,227,307	1.7%	\$28,672,328	1.7%	\$29,117,349	1.7%	\$29,562,370	1.7%	%	3.8%
Other NGF	\$18,578,000	\$14,967,000	-19.4%	\$14,967,000	0.0%	\$14,967,000	0.0%	\$14,967,000	0.0%	\$14,967,000	0.0%	\$14,967,000	0.0%	\$14,967,000	0.0%	\$14,967,000	0.0%	\$14,967,000	0.0%	\$14,967,000	0.0%	\$14,967,000	0.0%	\$14,967,000	0.0%	\$14,967,000	0.0%	%	-3.0%
Total E&G NGF Revenue	\$507,967,999	\$527,095,667	3.8%	\$554,984,641	5.3%	\$584,704,346	5.4%	\$594,448,132	1.7%	\$604,340,499	1.7%	\$614,383,723	1.7%	\$624,580,117	1.7%	\$634,837,511	1.7%	\$645,144,905	1.7%	\$655,512,299	1.7%	\$665,929,693	1.7%	\$676,397,087	1.7%	\$686,914,481	1.7%	%	3.0%
E&G GF Revenue (assume flat after 2024)	\$223,379,000	\$234,630,288	5.0%	\$234,630,288	0.0%	\$234,630,288	0.0%	\$234,630,288	0.0%	\$234,630,288	0.0%	\$234,630,288	0.0%	\$234,630,288	0.0%	\$234,630,288	0.0%	\$234,630,288	0.0%	\$234,630,288	0.0%	\$234,630,288	0.0%	\$234,630,288	0.0%	\$234,630,288	0.0%	%	0.7%
<b>Total E&amp;G Revenue</b>	<b>\$731,346,999</b>	<b>\$761,725,955</b>	<b>4.2%</b>	<b>\$789,614,928</b>	<b>3.7%</b>	<b>\$819,334,634</b>	<b>3.8%</b>	<b>\$829,078,420</b>	<b>1.2%</b>	<b>\$838,970,787</b>	<b>1.2%</b>	<b>\$849,014,011</b>	<b>1.2%</b>	<b>\$859,210,405</b>	<b>1.2%</b>	<b>\$869,460,791</b>	<b>1.2%</b>	<b>\$879,711,177</b>	<b>1.2%</b>	<b>\$889,961,563</b>	<b>1.2%</b>	<b>\$899,212,949</b>	<b>1.2%</b>	<b>\$909,463,335</b>	<b>1.2%</b>	<b>\$919,713,721</b>	<b>1.2%</b>	<b>%</b>	<b>2.3%</b>

Auxiliary Revenue	2022-2023 (Actual)			2023-2024 (Estimated)			2024-2025 (Planned)			2025-2026 (Planned)		
	Total Revenue	Total Revenue	Chg	Total Revenue	Chg	Total Revenue	Chg					
In-State undergraduates	\$80,276,212	\$83,558,515	4.1%	\$88,823,938	6.3%	\$96,467,238	8.6%					
All Other students	\$33,626,751	\$34,836,484	3.6%	\$36,971,533	6.1%	\$40,152,933	8.6%					
Total non-E&G fee revenue	\$113,902,963	\$118,395,000	3.9%	\$125,795,470	6.3%	\$136,620,170	8.6%					
<b>Total Auxiliary Revenue</b>	<b>\$255,343,875</b>	<b>\$270,204,405</b>	<b>5.8%</b>	<b>\$282,516,361</b>	<b>4.6%</b>	<b>\$298,445,407</b>	<b>5.6%</b>					

**Part 3: Financial Aid Plan: 2022-23 through 2029-30**  
**George Mason University**

**Instructions:** Provide a breakdown of the projected source and distribution of tuition and fee revenue redirected to financial aid for the revenue numbers in Tab 2. 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**

<b>*2022-23 (Actual) Please see footnote below</b>									
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)	Implied Discount Rate	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$188,483,012	\$3,048,952	1.6%	\$3,048,952	\$14,220,579	\$12,670,911	\$215,374,502	12.5%	\$0 Compliant
Undergraduate, Out-of-State	\$150,506,880	\$29,345,340	19.5%	\$29,345,340	\$3,121,591	\$687,664	\$154,316,135	2.5%	
Graduate, In-State	\$44,986,667	\$0	%	\$0	\$4,925,873	\$5,448,636	\$55,361,176	18.7%	
Graduate, Out-of-State	\$77,656,622	\$0	%	\$0	\$12,355,422	\$280,844	\$90,292,888	14.0%	
First Professional, In-State	\$7,068,139	\$0	%	\$0	\$372,926	\$0	\$7,441,065	5.0%	
First Professional, Out-of-State	\$20,688,679	\$0	%	\$0	\$2,874,409	\$0	\$23,563,088	12.2%	
<b>Total</b>	<b>\$489,389,999</b>	<b>\$32,394,292</b>	<b>6.6%</b>	<b>\$32,394,292</b>	<b>\$37,870,800</b>	<b>\$19,088,056</b>	<b>\$546,348,855</b>	<b>10.4%</b>	

<b>2023-24 (Estimated)</b>									
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)	Implied Discount Rate	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$193,081,394	\$3,925,326	2.0%	\$3,925,326	\$14,504,991	\$14,145,060	\$221,731,445	12.9%	\$0 Compliant
Undergraduate, Out-of-State	\$157,844,002	\$37,774,674	23.9%	\$37,774,674	\$3,184,022	\$760,215	\$161,788,239	2.4%	
Graduate, In-State	\$43,036,179	\$0	%	\$0	\$5,001,780	\$6,023,484	\$54,061,442	20.4%	
Graduate, Out-of-State	\$88,741,783	\$0	%	\$0	\$12,751,940	\$310,474	\$101,804,196	12.8%	
First Professional, In-State	\$7,235,268	\$0	%	\$0	\$402,995	\$0	\$7,638,264	5.3%	
First Professional, Out-of-State	\$22,190,041	\$0	%	\$0	\$2,782,488	\$0	\$24,972,530	11.1%	
<b>Total</b>	<b>\$512,128,667</b>	<b>\$41,700,000</b>	<b>8.1%</b>	<b>\$41,700,000</b>	<b>\$38,628,216</b>	<b>\$21,239,233</b>	<b>\$571,996,116</b>	<b>10.5%</b>	

<b>2024-25 (Planned)</b>									
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)	Implied Discount Rate	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$202,353,687	\$4,121,593	2.0%	\$4,121,593	\$15,230,241	\$18,129,904	\$235,713,832	14.2%	\$0 Compliant
Undergraduate, Out-of-State	\$167,640,241	\$39,663,407	23.7%	\$39,663,407	\$3,343,224	\$1,003,035	\$171,986,500	2.5%	
Graduate, In-State	\$44,260,089	\$0	%	\$0	\$5,251,990	\$7,947,445	\$57,459,524	23.0%	
Graduate, Out-of-State	\$94,450,276	\$0	%	\$0	\$13,390,467	\$409,642	\$108,250,385	12.7%	
First Professional, In-State	\$7,694,016	\$0	%	\$0	\$423,024	\$0	\$8,117,040	5.2%	
First Professional, Out-of-State	\$23,619,331	\$0	%	\$0	\$2,920,682	\$0	\$26,540,013	11.0%	
<b>Total</b>	<b>\$540,017,641</b>	<b>\$43,785,000</b>	<b>8.1%</b>	<b>\$43,785,000</b>	<b>\$40,559,627</b>	<b>\$27,490,027</b>	<b>\$608,067,294</b>	<b>11.2%</b>	

**2025-26 (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)	Implied Discount Rate	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$212,069,506	\$4,327,672	2.0%	\$4,327,672	\$15,991,753	\$22,543,468	\$250,604,727	15.4%	\$0 Compliant
Undergraduate, Out-of-State	\$178,101,889	\$41,646,578	23.4%	\$41,646,578	\$3,510,385	\$1,247,215	\$182,859,489	2.6%	
Graduate, In-State	\$45,684,616	\$0	%	\$0	\$5,514,590	\$9,882,180	\$61,081,386	25.2%	
Graduate, Out-of-State	\$100,543,893	\$0	%	\$0	\$14,059,991	\$509,366	\$115,113,250	12.7%	
First Professional, In-State	\$8,185,579	\$0	%	\$0	\$444,175	\$0	\$8,629,753	5.1%	
First Professional, Out-of-State	\$25,151,862	\$0	%	\$0	\$3,066,716	\$0	\$28,218,579	10.9%	
Total	\$569,737,346	\$45,974,250	8.1%	\$45,974,250	\$42,587,608	\$34,182,230	\$646,507,185	11.9%	

2026-27 (Pro Forma)

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)	Implied Discount Rate	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$215,475,240	\$4,327,672	2.0%	\$4,327,672	\$15,991,753	\$22,915,009	\$254,382,002	15.3%	\$0 Compliant
Undergraduate, Out-of-State	\$180,897,639	\$41,646,578	23.0%	\$41,646,578	\$3,510,385	\$1,207,401	\$185,615,424	2.5%	
Graduate, In-State	\$46,920,983	\$0	%	\$0	\$5,514,590	\$9,566,714	\$62,002,287	24.3%	
Graduate, Out-of-State	\$102,294,484	\$0	%	\$0	\$14,059,991	\$493,106	\$116,847,581	12.5%	
First Professional, In-State	\$8,315,654	\$0	%	\$0	\$444,175	\$0	\$8,759,829	5.1%	
First Professional, Out-of-State	\$25,577,133	\$0	%	\$0	\$3,066,716	\$0	\$28,643,849	10.7%	
Total	\$579,481,132	\$45,974,250	7.9%	\$45,974,250	\$42,587,608	\$34,182,230	\$656,250,971	11.7%	

2027-28 (Pro Forma)

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)	Implied Discount Rate	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$219,310,129	\$4,327,672	2.0%	\$4,327,672	\$15,991,753	\$22,915,009	\$258,216,891	15.1%	\$0 Compliant
Undergraduate, Out-of-State	\$183,695,598	\$41,646,578	22.7%	\$41,646,578	\$3,510,385	\$1,207,401	\$188,413,383	2.5%	
Graduate, In-State	\$47,855,942	\$0	%	\$0	\$5,514,590	\$9,566,714	\$62,937,246	24.0%	
Graduate, Out-of-State	\$104,055,230	\$0	%	\$0	\$14,059,991	\$493,106	\$118,608,327	12.3%	
First Professional, In-State	\$8,447,713	\$0	%	\$0	\$444,175	\$0	\$8,891,888	5.0%	
First Professional, Out-of-State	\$26,008,887	\$0	%	\$0	\$3,066,716	\$0	\$29,075,603	10.5%	
Total	\$589,373,499	\$45,974,250	7.8%	\$45,974,250	\$42,587,608	\$34,182,230	\$666,143,337	11.5%	

2028-29 (Pro Forma)

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)	Implied Discount Rate
Undergraduate, In-State	\$223,203,516	\$4,327,672	1.9%	\$4,327,672	\$15,991,753	\$22,915,009	\$262,110,278	14.8%
Undergraduate, Out-of-State	\$186,536,224	\$41,646,578	22.3%	\$41,646,578	\$3,510,385	\$1,207,401	\$191,254,010	2.5%
Graduate, In-State	\$48,805,176	\$0	%	\$0	\$5,514,590	\$9,566,714	\$63,886,480	23.6%
Graduate, Out-of-State	\$105,842,796	\$0	%	\$0	\$14,059,991	\$493,106	\$120,395,892	12.1%
First Professional, In-State	\$8,581,787	\$0	%	\$0	\$444,175	\$0	\$9,025,962	4.9%
First Professional, Out-of-State	\$26,447,223	\$0	%	\$0	\$3,066,716	\$0	\$29,513,940	10.4%
Total	\$599,416,723	\$45,974,250	7.7%	\$45,974,250	\$42,587,608	\$34,182,230	\$676,186,562	11.4%

2029-30 (Pro Forma)								
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)	Implied Discount Rate
Undergraduate, In-State	\$227,156,298	\$4,327,672	1.9%	\$4,327,672	\$15,991,753	\$22,915,009	\$266,063,060	14.6%
Undergraduate, Out-of-State	\$189,420,173	\$41,646,578	22.0%	\$41,646,578	\$3,510,385	\$1,207,401	\$194,137,958	2.4%
Graduate, In-State	\$49,768,904	\$0	%	\$0	\$5,514,590	\$9,566,714	\$64,850,208	23.3%
Graduate, Out-of-State	\$107,657,592	\$0	%	\$0	\$14,059,991	\$493,106	\$122,210,688	11.9%
First Professional, In-State	\$8,717,907	\$0	%	\$0	\$444,175	\$0	\$9,162,081	4.8%
First Professional, Out-of-State	\$26,892,244	\$0	%	\$0	\$3,066,716	\$0	\$29,958,960	10.2%
Total	\$609,613,117	\$45,974,250	7.5%	\$45,974,250	\$42,587,608	\$34,182,230	\$686,382,956	11.2%

*\* 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.*

**Part 4: ACADEMIC-FINANCIAL PLAN: 2024-25 through 2029-30**  
**George Mason University**

Instructions: The Academic Plan should contain academic, finance, and support service strategies the institution intends to employ in meeting state needs/goals as found in the Virginia Plan. (Please see the main instructions sheet in this workbook for more detailed information about The Virginia Plan. Please provide short titles to identify institutional strategies and other expenditure increases. Provide a concise description in the "Notes" column (column O), including a % increase where relevant and a specific reference as to where more detailed information can be found in the Narrative document.

Complete the lines appropriate to your institution, adding lines within the relevant categories as needed. As completely as possible, the items should represent a complete picture of your anticipated use of projected tuition revenues and strategic focus areas. Categories are listed in bold; you may not change the categories but you may add lines where indicated. Please update total cost formulas if necessary. For every line, the total amount and the sum of the reallocation and tuition revenue (and GF when indicated) should equal one another.

Funding amounts in the first year should be incremental. However, if the costs continue into the second year and beyond, they should be reflected cumulatively (i.e. cost increases vs. 2023-24). Please update total cost formulas if necessary. Institutions should assume no general fund (GF) support in 2024-26 in this worksheet other than for salaries, health insurance and VITA charges per the instructions below. A separate worksheet (Part 6) is provided for institutions to request additional GF support for 2024-26. 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 6, General Fund Request, of the plan.

Also, 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 be included in an institution's plan, unless they are completely supported by tuition revenue.

Lines 5 and 6 are newly added to collect the estimated E&G expenditures of 2022-23 and 2023-24 as baselines for Tab 5 Pro Forma.

For the 2026-28 biennium and 2028-2030 biennium, total amounts should be provided as estimates of future expenditures on these items but delineation of reallocation vs. tuition revenue vs. GF does not need to be provided by the institution.

Funding amounts shall assume an annual 2% salary increase for each year from FY2025 to FY2030 for those employees eligible for the state-supported salary increases in the 2022-2024 biennium. Funding amounts shall also assume an annual 3% health insurance increase and a 5.36% VITA cost increase. Institutions shall calculate the GF portion of these increases in columns H and L using the appropriate fund share, which can be found in Tab 4b. If an institution plans to use its own funds to provide additional salary increases, add lines below the "increased fringe benefits costs" and specify salary amount by employee type and associated fringe benefit costs, but do not put any dollar amount in Columns H and L.

NOTE: In light of ongoing budget negotiations, please complete the template assuming only what has already been signed into law as the baseline 2022-23 and 2023-24 appropriation. In the event that a new budget results in additional funding for institutions in 2023-24, OpSix will provide guidance at that time on whether and how to modify or resubmit plans.

<b>Please estimate total E&amp;G expenditures for 2022-23 and 2023-24</b>		<b>2024-2025</b> (Auto-calculated)	<b>2025-2026</b> (Auto-calculated)
Total Estimated 2022-23 E&G Expenditures	\$772,834,355	Implied GF share	Implied GF share
Total Estimated 2023-24 E&G Expenditures	\$782,808,138	48.1%	42.5%

Short Title	Incremental amounts relative to 2023-24 estimated baseline												Explanation Please be brief; reference specific narrative question for more detail. Explicitly share key assumptions, including any additional salary increases beyond the 2% increase baseline.	
	2024-2025				2025-2026				2026-2027	2027-2028	2028-2029	2029-2030		
	Total Amount	Reallocation	Amount from Tuition Revenue	Amount from GF (Salaries & benefits only)	Total Amount	Reallocation	Amount from Tuition Revenue	Amount from GF (Salaries & benefits only)	Total Amount (Pro Forma)	Total Amount (Pro Forma)	Total Amount (Pro Forma)	Total Amount (Pro Forma)		
<b>Salary &amp; benefit increases for existing employees</b>														
Increase T&R Faculty Salaries	\$4,640,031	\$0	\$2,398,445	\$2,241,586	\$11,680,054	\$0	\$7,066,466	\$4,613,588	\$18,860,878	\$26,185,319	\$33,656,248	\$41,276,596		
Increase Admin. Faculty Salaries	\$2,149,188	\$0	\$1,143,424	\$1,005,764	\$4,304,340	\$0	\$2,272,696	\$2,031,643	\$6,502,594	\$8,744,813	\$11,031,877	\$13,364,882		
Increase Classified Staff Salaries	\$3,078,200	\$0	\$1,614,117	\$1,464,082	\$7,215,268	\$0	\$4,247,388	\$2,967,879	\$11,435,077	\$15,739,283	\$20,129,573	\$24,607,668		
Increase University Staff Salaries	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
Increase GTA Salaries	\$533,892	\$0	\$280,634	\$253,258	\$1,078,462	\$0	\$566,881	\$511,581	\$1,633,924	\$2,200,494	\$2,778,397	\$3,367,857		
Increase Adjunct Faculty Salaries	\$715,053	\$0	\$340,472	\$374,581	\$1,542,738	\$0	\$786,083	\$756,654	\$2,386,976	\$3,248,099	\$4,126,444	\$5,022,356		
3% annual state health insurance cost-Faculty	\$566,924	\$0	\$285,163	\$281,761	\$1,155,999	\$0	\$581,468	\$574,532	\$1,756,856	\$2,369,730	\$2,994,861	\$3,632,494		
3% annual state health insurance cost-Admin Faculty	\$176,797	\$0	\$88,929	\$87,868	\$367,129	\$0	\$179,636	\$177,493	\$541,068	\$728,687	\$920,057	\$1,115,255		
3% annual state health insurance cost-Classified Staff	\$526,789	\$0	\$264,974	\$261,814	\$1,064,113	\$0	\$535,249	\$528,864	\$1,612,184	\$2,171,216	\$2,741,429	\$3,323,046		
Increase Wage Salaries	\$339,212	\$0	\$168,333	\$170,879	\$730,114	\$0	\$384,938	\$345,176	\$1,128,835	\$1,535,529	\$1,950,358	\$2,373,483		
Increase CWS Salaries	\$4,003	\$0	\$4,003		\$9,519	\$0	\$9,519		\$15,145	\$20,884	\$26,738	\$32,709		
Increase Other Salaries	(\$105,302)	\$0	(\$105,302)		(\$43,900)	\$0	(\$43,900)		\$18,730	\$82,612	\$147,772	\$214,236		
Planned Budget Reductions	(\$5,149,250)	(\$5,149,250)	\$0		(\$5,149,250)	(\$5,149,250)	\$0		(\$5,149,250)	(\$5,149,250)	(\$5,149,250)	(\$5,149,250)	Effort to reduce deficit each year from FY24-FY26, with planned drawdown of reserves to offset E & G budget deficit totaling \$103.1M (FY23-FY26), which is not sustainable.	
Retention Program	\$2,500,090	\$0	\$2,500,090		\$5,000,180	\$0	\$5,000,180		\$7,500,270	\$10,000,360	\$12,500,450	\$15,000,540		
Retirement Incentive Program	(\$2,700,000)	(\$2,700,000)	\$0		(\$9,000,000)	(\$9,000,000)	\$0		(\$9,000,000)	(\$9,000,000)	(\$9,000,000)	(\$9,000,000)	Proj. \$18M program implementation costs, with est. 50% compensation savings achieved @30% in FY25 (\$5.4m) & 70% in FY26 (\$12.6m)	
Increase new Faculty positions	\$0	\$0	\$0		\$2,329,313	\$0	\$2,329,313		\$2,329,313	\$2,329,313	\$2,329,313	\$2,329,313		
Increase new Staff positions	\$0	\$0	\$0		\$1,150,024	\$0	\$1,150,024		\$1,150,024	\$1,150,024	\$1,150,024	\$1,150,024		
<b>Inflationary non-personnel cost increases</b>														
5.36% annual VITA charge increase	\$2,680	\$0	\$1,348	\$1,332	\$4,227	\$0	\$2,823	\$1,404	\$4,454	\$4,692	\$4,944	\$5,209		
Contractual services	\$2,917,398	(\$1,472,302)	\$4,389,700		\$7,578,380	(\$1,472,302)	\$9,050,682		\$13,891,219	\$18,973,731	\$24,310,317	\$29,913,678		
Utilities	\$529,934	\$0	\$529,934		\$1,086,364	\$0	\$1,086,364		\$1,670,616	\$2,284,081	\$2,928,219	\$3,604,563		
AE to E&G Transfer	(\$451,280)	\$0	(\$451,280)		(\$1,018,480)	\$0	(\$1,018,480)		(\$1,602,697)	(\$2,204,440)	(\$2,824,235)	(\$3,462,624)		
Other Direct Expenses	\$1,281,323	\$0	\$1,281,323		\$2,601,086	\$0	\$2,601,086		\$3,960,441	\$5,360,577	\$6,802,718	\$8,288,122		
[Add lines & descriptions here]	\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0	\$0		
<b>Financial aid expansion</b>														
Add'l In-State Student Financial Aid from Tuition Rev	\$196,266	\$0	\$196,266		\$402,346	\$0	\$402,346		\$402,346	\$402,346	\$402,346	\$402,346	In Scholarships & Fellowships	
Add'l Out-of-State Student Financial Aid from Tuition Rev	\$1,888,734	\$0	\$1,888,734		\$3,871,904	\$0	\$3,871,904		\$3,871,904	\$3,871,904	\$3,871,904	\$3,871,904	In Scholarships & Fellowships	
Scholarships & Fellowships	\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0	\$0		
[Add lines & descriptions here]	\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0	\$0		
<b>New/expanded academic programs</b>														
[Add lines & descriptions here]	\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0	\$0		
[Add lines & descriptions here]	\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0	\$0		
[Add lines & descriptions here]	\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0	\$0		
[Add lines & descriptions here]	\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0	\$0		
[Add lines & descriptions here]	\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0	\$0		

**Part 4: ACADEMIC-FINANCIAL PLAN: 2024-25 through 2029-30**  
**George Mason University**

Other academic & student support strategies & initiatives															
Student success initiatives:		\$8,182,500	\$1,472,302	\$6,710,198		\$12,765,000	\$1,472,302	\$11,292,698		\$13,147,950	\$13,542,389	\$13,948,660	\$14,367,120	NGF 3% annual growth factor FY27-FY30/See Section C2.	
		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0	\$0		
		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0	\$0		
		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0	\$0		
		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0	\$0		
Other non-academic strategies & initiatives															
[Add lines & descriptions here]		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0	\$0		
[Add lines & descriptions here]		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0	\$0		
[Add lines & descriptions here]		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0	\$0		
[Add lines & descriptions here]		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0	\$0		
[Add lines & descriptions here]		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0	\$0		
<b>Total Additional Funding Need</b>		<b>\$21,823,182</b>	<b>(\$7,849,250)</b>	<b>\$23,529,506</b>	<b>\$6,142,926</b>	<b>\$50,714,929</b>	<b>(\$14,149,250)</b>	<b>\$52,355,365</b>	<b>\$12,508,815</b>	<b>\$78,068,857</b>	<b>\$104,592,393</b>	<b>\$131,779,162</b>	<b>\$159,651,327</b>		

Must not be greater than incremental Tuit Rev in Part 2	
2024-2025	2025-2026
(\$4,359,468)	(\$5,253,315)

If result is < \$0,  
please provide  
explanation in these  
fields.



**Part 5: Six-year Pro Forma Calculations: 2022-23 through 2029-30**  
**George Mason University**

Instructions: No new data needs to be added on this tab; it is entirely comprised by formulas. The top section pulls in data from the previous tabs to calculate a pro forma budget surplus/deficit for the 6 years. The following section calculates what T&F (price) and GF increases would theoretically need to occur each year in order to cover the deficit and maintain the 2022-23 GF/NGF split. At the bottom is a blended scenario calculator that a user can leverage to calculate custom "shared" scenarios where deficits can be covered by a combination of expenditure reduction, T&F increases, and GF increases. Cells D28:30 should be set by the user (so long as they add up to 100%) and the results will flow into the rows below that automatically. This analysis is intended to be directional and pro forma; it is not intended to be interpreted as a projection or plan/budget of any kind.

Note: this pro forma does not include any of the additional GF requests in the following tab; those requests would require GF funding on top of what is calculated in this tab. It does account for the salary/health insurance/VITA increases from tab 4, including the corresponding GF increases.

Baseline Pro Forma Surplus/Deficit	From FY23-FY30												Total Chg	Avg Annual Chg			
	2022-2023 (Actual)	2023-2024 (Estimated)	Chg	2024-2025	Chg	2025-2026	Chg	2026-2027	Chg	2027-2028	Chg	2028-2029			Chg	2029-2030	Chg
Total E&G GF Revenue (includes tab 4, not tab 6)	223,379,000	234,630,288	5%	240,773,214	3%	247,139,103	3%	252,711,832	2%	259,468,583	3%	266,360,473	3%	273,390,204	3%	22%	3%
Tuition discount rate	10.4%	10.5%	0.041pt	11.2%	0.725pt	11.9%	0.683pt	11.7%	-0.176pt	11.5%	-0.174pt	11.4%	-0.171pt	11.2%	-0.169pt	0.759pt	%
Total E&G NGF Revenue	507,967,999	527,095,667	4%	554,984,641	5%	584,704,346	5%	594,448,132	2%	604,340,499	2%	614,383,723	2%	624,580,117	2%	23%	3%
Incremental E&G NGF Revenue vs. prior yr	19,127,668	27,888,974	46%	29,719,706	7%	9,743,786	-67%	9,892,367	2%	10,043,224	2%	10,196,394	2%	10,196,394	2%	-47%	
Total E&G Revenue	731,346,999	761,725,955	4%	795,757,855	4%	831,843,449	5%	847,159,965	2%	863,809,082	2%	880,744,196	2%	897,970,321	2%	18%	3%
Implied GF % of E&G	30.5%	30.8%	0.3pt	30.3%	-0.5pt	29.7%	-0.5pt	29.8%	0.1pt	30.0%	0.2pt	30.2%	0.2pt	30.4%	0.2pt	-0.1pt	%
Total E&G Expenditures	772,834,355	792,808,138	3%	814,631,320	3%	843,523,067	4%	870,876,995	3%	897,400,531	3%	924,587,300	3%	952,459,465	3%	23%	3%
Incremental E&G Expenditures vs. 2023-24				21,823,182		50,714,929	132%	78,068,857	54%	104,592,393	34%	131,779,162	26%	159,651,327	21%	632%	
Reallocation of existing dollars (flat after 2025-26)				-		-	%	-		-		-		-			
Pro Forma Surplus/Deficit	(41,487,356)	(31,082,183)	-25%	(18,873,465)	-39%	(11,679,619)	-38%	(23,717,030)	103%	(33,591,449)	42%	(43,843,104)	31%	(54,489,144)	24%	189%	27%
Incremental Surplus/Deficit	(41,487,356)	10,405,173	-125%	12,208,718	17%	7,193,846	-41%	(12,037,412)	-267%	(9,874,419)	-18%	(10,251,655)	4%	(10,646,040)	4%	-187%	-27%

What would a constant GF/NGF ratio at 2022-23 levels imply for T&F and GF increases?																	
	2022-2023 (Actual)	2023-2024 (Estimated)	Chg	2024-2025	Chg	2025-2026	Chg	2026-2027	Chg	2027-2028	Chg	2028-2029	Chg	2029-2030	Chg	Total Chg	Avg Annual Chg
GF % of E&G	30.5%	30.5%	0pt	30.5%	0pt	30.5%	0pt	30.5%	0pt	30.5%	0pt	30.5%	0pt	30.5%	0pt	0pt	0pt
Implied incremental T&F Increase (%)	5.7%	-1.4%	-7pt	-1.5%	-0.2pt	-0.9%	0.7pt	1.4%	2.3pt	1.1%	-0.3pt	1.2%	0pt	1.2%	0pt	-4.5pt	-0.6pt
Implied incremental GF Increase (%)	5.7%	-1.4%	-7pt	-1.5%	-0.2pt	-0.9%	0.7pt	1.5%	2.3pt	1.2%	-0.3pt	1.2%	0pt	1.2%	0pt	-4.5pt	-0.6pt

Blended Scenario Calculator - Share of Deficit Covered by Each Source (Must add up to 100%)		<< Input percentages here															
Expenditure reductions	25%																
T&F increases	25%																
GF increases	50%																
<b>TOTAL</b>	<b>100%</b>																
	2022-2023 (Actual)	2023-2024 (Estimated)	Chg	2024-2025	Chg	2025-2026	Chg	2026-2027	Chg	2027-2028	Chg	2028-2029	Chg	2029-2030	Chg	Total Chg	Avg Annual Chg
Implied E&G Expenditure Reduction (%)	1.3%	-0.3%	-1.7pt	-0.4%	0pt	-0.2%	0.2pt	0.3%	0.6pt	0.3%	-0.1pt	0.3%	0pt	0.3%	0pt	-1.1pt	-0.2pt
Implied incremental T&F Increase (%)	2.0%	-0.5%	-2.5pt	-0.5%	-0.1pt	-0.3%	0.2pt	0.5%	0.8pt	0.4%	-0.1pt	0.4%	0pt	0.4%	0pt	-1.6pt	-0.2pt
Implied incremental GF Increase (%)	9.3%	-2.2%	-11.5pt	-2.5%	-0.3pt	-1.5%	1.1pt	2.4%	3.8pt	1.9%	-0.5pt	1.9%	0pt	1.9%	0pt	-7.3pt	-1pt
Implied GF % of E&G	32.0%	30.4%	-1.6pt	29.8%	-0.6pt	29.5%	-0.4pt	30.2%	0.8pt	30.3%	0.1pt	30.6%	0.2pt	30.8%	0.2pt	-1.3pt	-0.2pt

Priority Ranking	Biennium 2024-2026 (7/1/24-6/30/26)						Notes/Explanation Please be brief; reference specific narrative question for more detail.
	Strategies (Match Academic-Financial Worksheet Short Title)	Category (Select best option from dropdown)	2024-2025		2025-2026		
			Total Amount	GF Support	Total Amount	GF Support	
1	Deliver a distinctive and inclusive student experience that fosters lifelong engagement	Student Success					
	1a) Financial Aid		\$18,267,204	\$8,000,000	\$18,909,435	\$8,000,000	State Aid-10% annual increase over FY24 w/goal of moving towards meeting 100% of unmet need and extending MVP grants to all students who are Pell-eligible;1/3 of 5% tuition increase for add'l insttit aid (Prog. 108 additional resources needed). <b>See Section B; C1 &amp; C2</b>
	1b) Expand Access		\$2,365,000	\$1,182,500	\$2,365,000	\$1,182,500	1) Expand ADVANCE to more 2 yr instit-\$200K; 2) Scale up EIP-\$240K; 3) Launch pilot Direct Admissions to low income VA H.S. students-\$1.1M; 4) Expand Bachelors to Accel. Masters programs-\$300K;5) Increase online accessibility-\$525K- all 50% GF; <b>See Sections B2 &amp; C2.</b>
	1c) Student Success Initiatives		\$20,000,000	\$13,000,000	\$16,800,000	\$13,400,000	1) New technologies (Salesforce )-consolidate into one platform \$10.2M FY25; \$3M-FY26;3) Integrated student support framework (advising; coaching; career)- Salesforce-\$800K; 4) one-stop shop shared services-\$1.5M; 5) Strengthen student wellbeing, mental health services-\$1.5M; (1-5 @ 50% GF) 6) Establish MasonWorks student employment program - \$6M FY25 ; \$10M-FY26 - 100% GF. <b>See Section B2 &amp; C2.</b>
	1d) Unfunded Mandate-Virginia Military Survivors & Dependent Education Program		\$13,013,000	\$13,013,000	\$16,916,900	\$16,916,900	State support for VMSDEP tuition waivers & mandatory student fee waivers currently funded from reallocated tuition revenues (FY23-\$7.7M; Assume 30% annual increase given recent trends); <b>See Section K1-Policy Change.</b>
4	Expand the impact of Mason's research, scholarship, and creative enterprise	Research					<b>See Section I1.</b>
	4a)Support/ Infrastructure		\$9,850,000	\$9,850,000	\$3,850,000	\$3,850,000	Research compute: 1) Annual infrastructure refresh -\$1M/yr; 2) one-time server infrastructure replacement cost-\$6M (FY25); 3) Core Lab Mgrs-\$600K/yr; 4) Mgmt & student support-\$1.5M/yr; 5) Shared services operational support-\$750K/yr
	4b) Scholarship		\$2,750,000	\$2,750,000	\$2,750,000	\$2,750,000	Annual costs: Eminent Scholars (\$2M); Experiential Education-OSCAR (\$750K)
3	Expand partnerships for economic and social impact.	Economic Development	\$5,400,000	\$5,400,000	\$5,400,000	\$5,400,000	Annual costs: Coulter Program-Mason entrepreneurship training & support to commercialize Institute technology (\$4M); Small Business Development & Mason Enterprise Center Mentor funding (\$1.4M)
2	Invest in faculty and staff success	Cost efficiency					<b>See Section D5.</b>
	2a) Equitable Compensation		\$6,115,894	\$6,115,894	\$6,273,585	\$6,273,585	Variance to achieve 100% State match on 2% sal cost-share; address one-year compensation lag ( <b>See Section K1-Policy Change.</b> )
	2b) Efficient systems, infrastructure, reduce manual processes		\$5,500,000	\$5,500,000	\$3,700,000	\$3,700,000	1) Reduce manual workflow-\$2M/yr; 2) New HR app tracking-\$1M/Yr1; \$200K/Yr 2 3) New identity mgmnt & access system-\$1M/Yr1; \$1.5M/Yr2 4) Budget Development & Planning Tool-\$1.5M-1x (NB: Salesforce in Strategy #1)
	2c) HEETF-Increased institutional support		\$5,000,000	\$5,000,000	\$8,000,000	\$8,000,000	<b>See Section E1.</b>

**2023 SIX-YEAR PLAN NARRATIVE (Part II)**  
**INSTITUTION: George Mason University**

**OVERVIEW**

The six-year plan should describe the institution’s goals as they relate to the Commonwealth’s goals as articulated in the *Pathways to Opportunity: The Virginia Plan for Higher Education*; the Higher Education Opportunity Act of 2011 (TJ21); the Restructured Higher Education Financial and Administrative Operations Act of 2005; and the Governor’s objectives to prepare every graduate for success in life. Please use this opportunity to outline your institution’s plans and objectives, especially as they relate to the Commonwealth’s goals.

The instructions within the institutional mission and priorities section below ask for specific strategies related to affordability and access to quality postsecondary education that prepare students for success in life. Other sections offer institutions the opportunity to describe additional strategies to advance institutional goals and Commonwealth needs.

***Please be comprehensive but as concise as possible with responses; you are encouraged to use bullet points vs. prose. Consider this a starting point for the dialogue with OpSix; you will have the opportunity to further elaborate on the narrative in your review sessions later this summer.***

***Please save this narrative document with your institution’s name added to the file name.***

**SECTION A: MISSION & PRIORITIES**

***Key question: What are your institution’s unique strengths and how do those inform your strategic priorities?***

**A1. What is your institutional mission? Please share any plans you have to change your mission over the six-year period.**

**Mission:** To be an innovative and inclusive academic community committed to creating a more just, free, and prosperous world.

**Vision and purpose.** As a public, comprehensive, R1 institution, Mason provides opportunities and access to excellence for those who seek a quality, affordable education. Mason leverages our collective talents to solve the world’s most pressing challenges.

Mason’s mission is reaffirmed in our [Strategic Directions](#)

- Deliver a distinctive and inclusive student experience that fosters lifelong engagement.
- Expand the impact of Mason’s research, scholarship, and creative enterprise.
- Expand partnerships for economic and social impact.
- Exemplify a university culture of diversity, equity, and inclusion.
- Invest in faculty and staff success

**A2. What are your institution’s greatest strengths and areas of distinctiveness that it should continue to invest in? What are your institution’s greatest opportunities for improvement?**

**Strengths and Distinctiveness:**

- Unparalleled access and opportunity for all commonwealth residents evidenced by:
  - Mason educates more in-state undergraduates than any other Virginia 4-year.
  - Mason’s admission rate of nearly 90% reflects our access mission.
  - Extraordinary 1-year retention and 6-year graduation rates for an institution with such a high admit rate, exceeding the mean for R1/Access (admission rates of 80% or higher) peers by as much as 9ppts, reflecting our success in educating and enabling social mobility for underserved populations.

Source: IPEDS	1 Year Retention Rate (Fall 2020 Cohort)	6 Year Graduation Rate (Fall 2015 Cohort)
Mason	84	71
Peer Mean/Median/Min/Max	82/84/68/92	62/65/37/81

- Mason’s graduates contribute to the Commonwealth’s tax base at higher rates than other public 4-year institutions, the effect of which is amplified by the volume we serve.
  - 73% of in-state graduates remain in Virginia, exceeding the mean for all public 4-year institutions by 3ppts.
  - 29% of out-of-state graduates also stay in Virginia, again exceeding the mean for all public 4-year institutions by 9ppts.
- Mason is cost efficient. While FY 22 E&G expenses per student is at the median for all VA public 4-year institutions, Mason operates in the most expensive commonwealth market by far. Indeed, it is one of the most expensive markets in the United States.
- A comprehensive institution serving the diverse needs of a diverse population, Mason’s innovative program portfolio, mindful of workforce and pipeline development includes:
  - Virginia’s first College of Public Health
  - Tech Talent programming, including programs in cyber-security, artificial intelligence, and the ethics of artificial intelligence.
  - Our acclaimed College of Visual and Performing Arts includes the Virginia Serious Game Institute which cultivates and supports Mason-founded startups, rapid prototype development, high-value knowledge job creation, and regional economic development.
  - In 21-22 Mason graduated more than 150 students in each the following programs, demonstrating our role in meeting a broad spectrum of workforce needs: Psychology, Computer Science, Information Technology, Information Systems and Operations Management, Special Education, Criminology, Law and Society, Biology, Curriculum and Instruction, Nursing, Accounting, Business, Government and International Politics, Global Affairs, Management, Communication, Community Health, Data Analytics Engineering, Integrative Studies, Economics and Law.

The undergraduate students Mason serves (25% low income, 17% middle income, 61% minority, 23% first generation) often require additional, targeted support compared to students from other types of backgrounds. Unlikely to add additional expense to their education goals, many students from Northern Virginia choose Mason because it is cost effective for themselves and their families. Given the cost of living in Northern Virginia, the value of the work Mason does to enable social mobility while meeting workforce demands is undeniable. But it comes with funding needs commensurate with those factors.

Mason's start as a commuter school with significant capital needs contributed to the nature of funding requests and appropriations over time, which included an inequitable distribution of non-financial aid general fund appropriations to support the students we now serve as an R1 Access institution.

- A highlight that identified the base budget funding disparity was noted in a 2005 Joint Legislative Audit and Review Commission report that provided information on agencies with the most growth in total operating appropriations (excluding capital appropriations) between 1996 and 2005; while Mason was in the top 20 agencies for growth during that period, Mason's increases still lagged significantly behind other institutions of higher education.
- In 2014, Mason Government Relations focused efforts on addressing the funding disparity, which has resulted in certain Mason appropriations increasing annually at a higher comparative percentage rate, although increased appropriations were received at all institutions.
- Mason seeks Commonwealth support to narrow the funding gap further across universities and align funding with our R1 Commonwealth peers, mindful of the students we serve and the cost of living in Northern Virginia.
- As with the Governor's proposal to invest in K-12 public education to align with other states, as documented in the July 2023 JLARC report titled [Virginia's K-12 Funding Formula](#), Mason asks for similar investments to align our funding with our R1 peers.
- Simply aligning in-state undergraduate support levels between Mason and our closest peer would have provided more than \$35 million in FY23, significantly reducing our current operating shortfall and closing our future year funding equity gaps to reduce potential operating shortfalls.

To that end and to continue our support for the Governor's higher education agenda, we seek funding to:

- Continue investments in our core missions of student academic success and research including:
  - Technology improvements/enhancements to increase efficiency, enhance student services, reduce costs, and enable long-term tuition control, e.g., continuing the decade long investment in Salesforce to improve student experiences.
    - Mason is consolidating the multiple Salesforce instances into a streamlined single student lifecycle CRM.
    - The effects of which will allow Mason to improve processes and services to students through enhanced coaching and advising, real-time interventions, and engagements.
    - In turn, this will enhance retention and graduation rates and build the base for deeper alumni engagement after graduation.
- Offer competitive compensation for our skilled and talented staff (all of whom are also contributing to the prosperity of the Commonwealth).
- Continued investments in a variety of inter-institutional partnerships.

Additional details can be found in both the deep dive conversations below and the financial workbook.

**A3. What are the top 3-5 strategic priorities you are currently pursuing or planning to pursue in the next six years? Please explain how each strategy relates to the strengths and/or opportunities for improvement mentioned above and will ultimately drive better outcomes for students.**

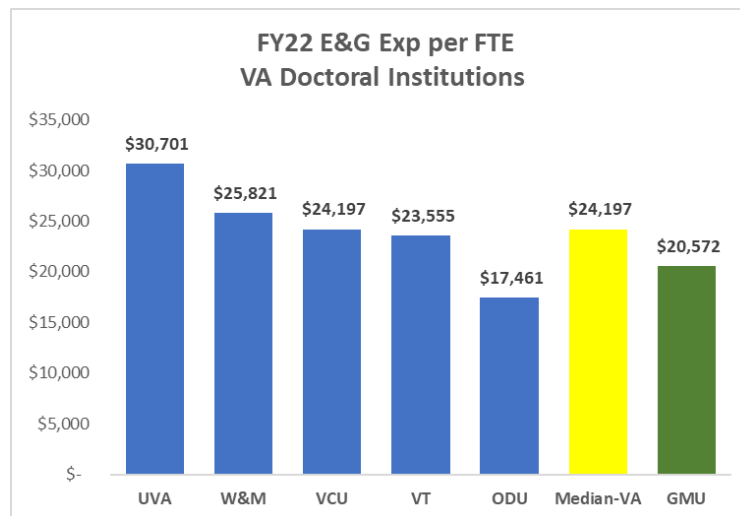
Mason's mission and value proposition are reaffirmed in our [Strategic Directions](#), each of which was developed to build upon our strengths paired with strategies that provide opportunities for innovation and exceptional learning:

- Deliver a distinctive and inclusive student experience that fosters lifelong engagement.
- Expand the impact of Mason's research, scholarship, and creative enterprise.
- Expand partnerships for economic and social impact.
- Exemplify a university culture of diversity, equity, and inclusion.
- Invest in faculty and staff success.

**A4. What support can OpSix provide to help you achieve those strategies? Please include both budget and policy requests and reference Part I of your submission where appropriate.**

The value proposition Mason provides to the Commonwealth is indisputable. However, our exceptional performance is not sustainable given inflationary pressures paired with years of comparative underfunding.

- While Mason’s costs are at the median of all 4-year VA institutions, Mason’s FY22 E&G expenses of \$21K per student FTE is 15% below the median of our Commonwealth doctoral peers, i.e., UVA, VT, VCU, ODU, and William & Mary, which stands at \$24K. See chart below.



(FP02: E&G Expenditures by Program & Annual Per FTE)

- Organizationally lean, Mason is understaffed with salaries that are below industry medians.
- The effects contribute to challenges in staff turnover and recruiting.

Following the review of all 6-year plans, Mason seeks a realignment of the general fund appropriation for universities with an eye towards equitable funding for Mason students. Consideration should be given to all available revenue sources, enrollment, tuition rates, unfunded mandate impacts, and the regional cost of living with the DC metro being the 5<sup>th</sup> most expensive area in the United States.

**In addition to addressing the foundational issue of funding,** Mason also seeks the following policy support:

- Grant Mason the autonomy to manage its cash reserves to generate investment / interest income for operational deployment.
- Allow Mason to use auxiliary reserves to purchase revenue-generating component assets, the effect of which would enable Mason to eliminate debt service on component unit facilities and save millions of dollars in operating expenses.

Mason has detailed strategies aligned with our strategic directions for which additional budget support, beyond what the institution is already investing, is requested totaling \$139.3M over the biennium including:

- Student Success: \$74.7MGF (\$35.2M FY 25; \$39.5 FY26)

- Impactful Research: \$19.2M GF (\$12.6M-FY25; \$6.6M-FY26)
- Partnerships: \$10.8M GF (\$5.4M-FY25; \$5.4M-FY26)
- Faculty and Staff Success: \$34.57M GF (\$16.6M FY25; \$17.97M FY26)

Mason will mitigate its FY23 budget deficit of \$41.5M with planned use of reserves. Our FY24 budget projects a \$41.4M budget deficit, which we plan to mitigate with a combination of budget reductions (\$10.4M), limited use of reserves, and new revenue generating opportunities.

Highlighting the continuing impact of Mason’s funding inequity relative to our Commonwealth R1 peers:

- Mason’s 6-year plan projects an E&G operating deficit of (\$18.9M) in FY25, declining to (\$11.7M) in FY26. This projection includes:
  - Savings to be realized with ongoing budget reductions, and
  - A 5% tuition increase in FY25 & FY26.
- A cumulative draw against reserves of \$103.1M is planned to offset anticipated deficits in FY23-FY26. This is financially unsustainable.
- The combined impact of both a 0% tuition increase from FY27-FY30 and flat Commonwealth general fund appropriation for FY27-FY30 will result in a spike in our (\$11.7M) operating deficit from FY26, increasing to (\$23.7M) in FY27 to (\$54.5M) in FY30 just to meet core operating expenses. This does not include funding for new initiatives (See Tab 5- Proforma).
- Further, without additional E&G funding, Mason may potentially face layoffs which impact student services, as well as the Virginia economy.

**SECTION B: STRATEGIC DEEP DIVE – ENROLLMENT VOLUME & COMPOSITION**

***Key question: How is your institution managing enrollment in light of state and national trends, and what are the financial implications?***

**B1. What do you see as the primary drivers of recent enrollment trends for your institution? Please reference any specific academic programs that have had a significant (positive or negative) effect on enrollment, if relevant.**



While there is a national “enrollment cliff”, Mason’s primary enrollment pipeline is based on Northern Virginia high school graduates. For the next few years, this population is growing and will level off at a value higher than this year’s graduation production. In addition, our programs and initiatives will result in growing market share.

- Projections for that specific population are far more impactful to Mason enrollment projections than either Commonwealth or national projections.
- However, there is increasing competition for this population from institutions within and outside the Commonwealth.
- Mason enrolls more transfer students than any other institution in the Commonwealth, expanded pipelines with Northern Virginia Community College and other VCCS institutions insulate against enrollment stress.

Overall institutional enrollment trends reflect:

- Continued growth in first time in college cohorts which has increased 12.7% in the last 5 years.
- Master’s level growth (11.6% in the last 5 years) specifically driven by international students (many from India) where enrollment growth in the last 5 years has increased 92.3%. Growth out of India has helped offset losses within our primary markets.
- Interest at all degree levels in all programs that contribute to the Commonwealth’s Tech Talent Identification Program (TTIP.) Enrollment has dramatically increased in these programs over the last 10 years (194% at the undergraduate and 203% at the graduate level.)
- Lingering effects of the pandemic:
  - Diminished pipeline for transfer students coming from 2-year institutions, specifically Northern Virginia Community College (NVCC)
  - As enrollment at NVCC stabilizes, Mason is poised to increase the number of new transfer students for the first time since mid-way through the pandemic.
  - Diminished pipeline of Commonwealth master student populations

**B2. Please summarize your enrollment management strategy moving forward and the specific actions (if any) you are taking to implement that strategy.**

Mason's strategy of modest, predictable growth built on undergraduate enrollment from within the Commonwealth, up 4.4% in last 5 years, paired with our comprehensive program array allows Mason to counter contradictory trends in the market.

Specific actions include:

- Direct admissions—proactive offers of admissions to students without an application, specifically targeting students from high schools with low college-going rates. We expect to offer more than 1,000 students an offer of admission through this program.
- Expand the transfer pathway program ADVANCE to other Virginia Community College System (VCCS).
- Increase undergraduate online program offerings.
- Launching a partnership for a centrally organized effort to recruit-back former Mason students who have stopped or dropped out.
- Expand Mason Virginia Promise (MVP) grants which guarantee gift aid equal to the cost of tuition and fees for in-state undergraduates with an annual (household?) income below \$60,000). In the previous aid year, 472 students received this grant totaling \$1.5M in institutional aid.
- Double the size of our Early Identification Program (EIP), currently at 750, which targets early interventions for high ability, low resource students beginning in grade 9.
- Consider implementing differential tuition pricing strategies within the DMV and neighboring states.
- Expanded service models, enabled by technology, to improve communication, automation, and online learning experiences to enhance student retention and progression including:
  - A new learning management system (LMS).
  - An enhanced operationalization of the Constituent Relationship Management (CRM) software.
  - Integrating student coaching/advising/mentoring within the envisioned student lifecycle CRM, connected to the currently operational, and to be expanded, one-stop shop.

**B3. How ambitious/realistic/conservative are the enrollment projections you most recently submitted to SCHEV? What are the greatest unknowns or risks that could lead enrollment to differ significantly from your projections? Please reference national and statewide enrollment trends/projections and cite any other data (e.g. regional trends, performance of prior enrollment strategies) that informed your projections.**

Mason's enrollment goals are realistic and achievable.

- Northern Virginia high school graduates are not expected to decline to the same degree as will be found in other parts of the Commonwealth.
- High school population growth in the DC area will likely mitigate national enrollment declines. In addition, Mason is developing direct entry programs that have the potential to increase acceptance rates and ultimately enrollment.
- Recent investments by the Commonwealth in need-based financial aid for Virginia students enhances Mason's ability to serve our sizable populations of low and middle-income students.
- Mason is also developing more specialized certificate programs in anticipation of changes in demand for degrees and to support lifelong learning and career development.

Mason relies on historic and current K-12 enrollment data (by grade, by county) from the [Virginia Department of Education Fall Membership Reports](#) to project future new in-state student enrollment. Grounded by historic trends, Mason projects future 12<sup>th</sup> grade enrollments in each county with the application of cohort survival ratios. Mason then estimates the percentage of future 12<sup>th</sup> graders in each county and, again, based on a historic application rate by county, for how many will apply to Mason.

Mason continues to invest in an aggressive out of state new undergraduate student enrollment strategy. At the graduate level, meeting workforce needs is a primary focus in both recruiting talent from out of state and enabling Commonwealth citizens to enhance skills through advanced study.

**B4. Explain the implications of your enrollment strategy on your institution's financials. Please consider impacts on both revenues (e.g., discounting, financial aid, net tuition revenue) and expenditures (e.g., costs to implement enrollment management strategies, costs of enrolling more students or students with different needs, cost-per-student impact of flat/decreased enrollment).**

- In FY22, Tuition and Fees comprised 67.7% of Mason E&G revenue (36.3% of Mason's All-Funds revenue), our primary source of funding.
- Mason leverages merit and need-based aid to achieve freshmen enrollment.
  - Mason attracts, admits, and enrolls a large percentage of middle- and low-income students unable to afford the full cost of attendance without assistance.
  - 83% of Mason's Virginia undergraduates with need come from households that earned less than \$100,000 annually in 2021-22, more than 10ppts higher than the 72.3% among all Virginia publics. (Source: SCHEV FA01)
  - Individual student discounting is an essential component of achieving enrollment goals.
  - A 2022 JLARC study titled ["Higher Education Financial Aid Grant Programs and Awards"](#) noted that:
    - Mason would need an additional \$35.7M in order to meet the financial need of its students.
    - Mason's student body is challenged by the limitations placed by the Commonwealth on assistance to part-time students. For Fall 2022, 25% of Mason's undergraduate enrollment was part-time.

**SECTION C: STRATEGIC DEEP DIVE – PROGRAM ALIGNMENT & PERFORMANCE**  
**COMPLETION OUTCOMES**

*Key question: How is your institution supporting all students to succeed in completing their degree in a timely manner?*

**C1. What are your highest-priority completion outcomes targets, both overall and for particular student segments? Please include aspirational targets, realistic expectations, and qualitative targets and specify by when you are aiming to meet those targets (e.g., X% 6-year graduation rate for Pell students by 2030).**

Mason’s impressive performance and future goals are summarized below

	1 Year Retention (Fall 21 Cohort)	6 Year Graduation (Fall 16 Cohort)
Overall	85.2	70.5
African American	82.9	69.3
Asian American	89	78.7
Hispanic	83.4	68.4
Pell	86.9	67.5
1 <sup>st</sup> Generation	83.7	66.6
<b>Threshold</b>	<b>86</b>	<b>69.8</b>
<b>Target (Target Cohort)</b>	<b>88 (2023)</b>	<b>72 (2018)</b>

While gaps between populations are small, especially for 1-year retention rate, our goal is to ameliorate all gaps while maintaining our notably outstanding performance.

**C2. What specific strategies/actions are you planning to take to achieve those goals? How will you draw on successes/challenges from your prior completion outcome improvement strategies?**

Mason's student success strategies, aligned with our student experience initiative detailed in our strategic directions and appropriately connected to our enrollment management strategies, builds on our successes, and innovates based on our knowledge.

- Mason Virginia Promise Grant financial aid initiative expansion:
  - Reduce out-of-pocket tuition expenses for Virginia students
  - Include all Virginia Pell-eligible students
- Expand Mason's ADVANCE program to all institutions in the Virginia Community College System.
- Grow the number of students participating in Mason's college preparatory Early Identification Program (EIP).
- Launch a direct admissions pilot program to qualified students enrolled at low-income Virginia high schools.
- Increase accessibility to place-bound learners through expanded online offerings.
- Adopt new technologies (learning management and customer relations management systems) to enhance the student experience and success.
- Implement an integrated student support framework inclusive of academic advising, success coaching, and career opportunities.
- Add new shared services delivered directly to students through an integrated one-stop-shop model.
- Expand Bachelors-to-Accelerated-Masters (BAM) programs and develop academic program partnerships with other Virginia institutions.
- Strengthen well-being, mental health, and accessibility services for students.
- Develop on-campus employment/retention task force targeting middle-income students.

Further, Mason has adopted several initiatives to increase student retention for targeted student populations:

- Emergency financial support
- Scholarship opportunities connected to majors and/or affinity groups.
- Increase childcare support for student parents, including military families.
- Assign Success Coaching for targeted at-risk populations.
- Continue to build the First-Generation Peer Mentoring program.
- Enhance understanding of the black male student experience to increase retention and graduation rates.
- Increase tutoring services for all students.
- Enhance language support for multi-lingual learners.

**C3. How will you use existing/recently provided resources to execute those strategies? Will you be requesting incremental state resources? Please state the request and rationale and explicitly tie to Part I of your planning template.**

Existing and recently provided resources will support:

- Additional financial aid base for the expansion of the MVP grant.
- Invested in and implemented:
  - Shared and student support services offered through the Mason Student Services Center, aka one-stop-shop.
  - Enhanced exploratory academic advising and success coaching.
  - New technologies (i.e., Salesforce, Stellar, Kognito and others) to enhance operational efficiency and the student experience.
  - Market-based salaries for faculty and staff to attract and retain top talent.
  - Investment in research institutes and initiatives.

## POST-COMPLETION OUTCOMES

*Key question: How is your institution preparing all students for success beyond completion (e.g., career preparation)?*

**C4. Please explain how you monitor post-completion outcomes (e.g., employment rates, wage attainment, debt load, upward mobility). What data do you collect? What metrics are you monitoring most closely? What do the data reveal about your institution's greatest strengths and areas for improvement with respect to post-completion outcomes? Please include any relevant data/reports in the appendix or as a separate attachment, including any data that captures outcomes by school/department/program.**

To track post completion outcomes, Mason monitors several external sources in addition to collecting information from our graduates.

- The [Post-Secondary Educations Outcomes](#) dashboard from the US Census enables Mason to track 1-, 5-, and 10-year wage outcomes by fields of study.
- Mason's Educational Destinations dashboard leverages National Student Clearinghouse data to determine if and where our graduates are pursuing additional education drillable to school/department/program.
- The Career Plans Survey, paired with social media data collection, provides for schools/colleges, departments, majors and degrees employment and salary outcomes as well as information regarding who is employing Mason graduates.
- Mason has requested (not yet received) from SCHEV further data on 1-year, 3-year, 10-year, 15-year student loans and wage averages for all degree programs at Mason compared to all reporting institutions to use in our analyses.

Mason is currently engaged in building a comprehensive student/alumni engagement platform using Salesforce. This will result in more comprehensive connections with our graduates, providing greater clarity on career outcomes.

Our strengths include:

- 75% or more lower-income students achieve upward mobility 5 years post-graduation. Given the volume of low- and middle-income populations that Mason serves, the value proposition is clear.
- Mason bachelor and master graduates' median income 3 years post-graduation is \$23k and \$38K more respectively, per year, than a high school graduate.
- Approximately 40% of Mason graduates hold degrees aligned with high-growth occupations in terms of workforce development. Of course, many graduates will also be employed in those areas, as the nature of high-growth fields inherently draws in degree fields outside of 1-1 matches.
- Close to 20% of Mason graduates are working in VEDP-designated priority industries.

***C5. What specific strategies/actions, including potential changes to your program portfolio or curriculum, are you planning to take to maximize the career readiness and job attainment of all students across programs of study, including increasing early career exposure for students (e.g., internships) during their time at your institution? How will you draw on successes/challenges from prior initiatives?***

Mason strives to provide opportunities for transformational experiences that enable our students to grow in their personal and professional goals. To maximize student potential for job attainment and enhance opportunities for career exposure specifically, several strategies are in place:

- The creation of program life cycle analyses for enhancing curricular program development: Research on national trends in undergraduate and graduate education paired with Mason program array informs curricular development. Consistent program review ensures that Mason is responsive to workforce needs.
- Increased focus on experiential learning, internships, and other high impact practices: As majors are increasingly including experiential learning and internship opportunities as part of their curriculum, students are afforded the option of earning college credit for this work. We are increasing these opportunities so that every student has an opportunity to engage in this high impact practice as part of their college experience.
- Enhanced opportunities for employer round tables and work force summits to maximize learning initiatives and new partnerships. Previous work in this area has informed the development of new majors and concentrations, supports industry credentials and updates curriculum. For example, both the cyber security and cloud concentrations as part of the Bachelor of Applied Studies program were informed by this type of conversation.
- Expand new Learning Initiatives/CPE to include more opportunities for credentialing at both the graduate and undergraduate level. In addition to industry credentials, Mason is offering more opportunities for badging and certifications that provide ways to enhance majors and ease students into new learning opportunities, e.g., a masters level student could earn certificates that build upon each other, stacking into a graduate degree.
- Create internship opportunities within university administration to give students real-world experience while also facilitating university efforts to improve systems and processes (example: Automation Center of Excellence) This model already exists at our Mason Korea branch campus and is a highly effective way to engage students in work-based learning.
- Increase study abroad opportunities for online Mason students and partnerships with other schools in the Commonwealth. Mason will expand the ways that students can enhance their global understanding through both face to face and virtual study abroad experiences. An example of this effort was developed during the pandemic when students studied environmental issues across continents, creating a documentary on Nepal and the impact of climate change.
- MasonWorks: an expanded student employment opportunity program.



**C6. How do you intend to use existing/provided resources to execute those strategies? Will you be requesting incremental state resources? Please explicitly tie to Part I of your planning template**

Mason's total institutional investment in the student success, access and financial aid strategies outlined in the workbook thus far is \$40.8M. Mason is requesting the Commonwealth contribute \$44.8M over the biennium to support this continuing work (See Strategy 1a-1c.)

**WORKFORCE ALIGNMENT**

***Key question: How are your institution's programs of study and degree conferrals aligned with the evolving talent needs of the Commonwealth?***

**C7. For which specific workforce needs is your institution best positioned to supply talent, based on regional, industry, or occupation alignment?**

As a critical regional partner for government, corporation and nonprofit entities, Mason graduates, at higher rates than other public 4-year institutions, choose to remain and work in Virginia and the DMV region upon degree completion.

- 73% of Mason in-state graduates remain in Virginia.
- 29% of Mason out-of-state graduates remain in the state effectively creating talent importation for the Commonwealth.
- 38% of Mason graduates consistently enter industries with the highest job growth in Virginia, and the proportion in the VEDP designated high priority tradable industries (18.5%) reflects a growing number of graduates.

Mason will continue to address workforce needs with the following plans:

- Greater integration of experiential learning and internships in alliance with the public and private sectors including the federal, state and local governments as well as corporate and non-profit organizations into degree programs.
- Better alignment of programs to careers. Majors to careers are not one-to-one, however, over 30% of Mason graduates have degree programs aligned with high growth occupations.
- Address specific gaps in critical areas such as nursing and education, with abbreviated approval processes and new curriculum design.
- Increased focus on workforce development through the new Learning Initiatives area that expands the work of Continuing/Professional Education; and
- Expand TTIP to ensure that Mason meets agreed upon state goals.

**C8. What specific strategies/actions is your institution planning to take to better align your program offerings or degree conferrals to current and projected workforce needs? Please provide a list of specific programs you intend to sunset or grow in the next 6 years to increase alignment, partnerships/initiatives you intend to launch or deepen, etc. If you intend to launch any new programs, please explain why your institution is particularly well-suited to succeed in that area.**

Mason's innovation and flexibility to meet Commonwealth needs can be demonstrated in a variety of ways.

- Appendix B details proposed degree/certificate programs, along with rationale, for the next 6 years
  - The MS Information and Security Assurance is scheduled to close this summer due to low enrollment.
  - Mason consistently reviews and closes programs. We anticipate other degrees/certificates may close as new programs, aligned with workforce needs become available.
  - Since January 2019, Mason has launched 15 new degree programs and 42 certificate programs.
  - At the same time, Mason has closed 21 degree programs and 22 certificate programs.
- Mason currently meets a broad spectrum of workforce needs as demonstrated by our 21-22 graduation cohort wherein more than 150 students graduated in each of the fields of study: Psychology, Computer Science, Information Technology, Information Systems and Operations Management, Special Education, Criminology, Law and Society, Biology, Curriculum and Instruction, Nursing, Accounting, Business, Government and International Politics, Global Affairs, Management, Communication, Community Health, Data Analytics Engineering, Integrative Studies, Economics and Law.
- Opportunities for targeted program growth for which Mason is well positioned, based on current success and alignment with critical state needs around technology and transfer student success, include:
  - The launch of Virginia's first and only College of Public Health which is partnering with INOVA, particularly related to meeting nursing education needs.
  - The intersection of Robotics and AI, Law and Policy.
  - Computer Science.
  - Bachelor of Applied Science programs in Cyber Security and Cloud Computing
  - Programs aligned with ADVANCE pathways including Psychology, Business, IT, Criminology, Law, and Society.
  - Educator preparation.
  - Artificial Intelligence and the ethics of AI.

Mason's Centers and Institutes support and enhance our program array and supports workforce needs with leading edge research in critical areas:

- Institute for a Sustainable Earth
- Institute for Digital Innovation
- Quantum Science and Engineering Center
- Center for Humanities Research
- Center for Advancing Human-Machine Partnerships
- Cybersecurity Manufacturing Institute ([CyManII](#))
- Institute for Biohealth Innovation
- Center for Adaptive Systems of Brain-Body Interaction
- Criminal Investigations and Network Analysis
- Center for Advancing Human-Machine Partnerships
- Center for Resilient and Sustainable Communities
- Center for Health Workforce

**SECTION D: STRATEGIC DEEP DIVE – FINANCIAL EFFECTIVENESS & SUSTAINABILITY**

**AFFORDABILITY FOR STUDENTS & FAMILIES**

**Key question: How is your institution accounting for and improving affordability for students and families?**

**D1. What specific strategies/actions do you plan to take to improve affordability moving forward across your overall student body and priority subpopulations, and what is the expected impact? Please account for a broad range of factors including the full cost of attendance, net price, time to degree, debt load, etc.**

- Mason adjusts aid/discount strategies based on privileging the neediest students while remaining mindful of the strategic use of aid to achieve both headcount and revenue targets.
  - Even with tuition increases, the total cost of attendance annual growth of 2.5% over 10 years reflects keeping pace with HEPI & CPI.
  - The impact of tuition increases for our neediest students has been offset with increased institutional aid.
  - As a result, annual borrowing/FTE (-2.4%) as well as % of students borrowing to attend GMU has declined.
- Expand the transfer pathway program ADVANCE to other Virginia Community College System (VCCS).
- Increase undergraduate online program offerings.
- Expand Mason Virginia Promise (MVP) grants which guarantee gift aid equal to the cost of tuition and fees for in-state undergraduates with an annual household income below \$60,000. In the previous aid year, 472 students received this grant totaling \$1.5M in institutional aid. Our first step is to expand this grant to all Pell-eligible students.
- Double the size of our Early Identification Program (EIP), currently at 750, which targets early interventions for high ability, low resource students beginning in grade 9.
- Mason budgets \$2.3M in emergency student funding through its Stay Mason program.

**REVENUE**

**Key question: How is your institution approaching pricing and revenue management? What are the implications on long-term top-line financial health?**

**D2. Please explain the rationale behind your full pricing (i.e. published tuition & fees, including mandatory non-E&G fees) and financial aid award strategy (i.e. net tuition revenue projections). What data informed your assessment of T&F increase feasibility (e.g., market comparisons, student capacity to pay) and estimates of discounts/ waivers/unfunded scholarships? What informed your strategy around financial aid awards, merit and need-based, particularly for various student segments by income level and academic preparation?**

Mason deliberately determines price in the context of our student's price range in order not to price ourselves out of affordability. We provide a high value education at a reasonable cost while maintaining accessibility as per our mission. Tuition and fees are proposed based on an analysis that includes:

- Competitor price monitoring. Competitors are identified using National Student Clearinghouse data.
- Surveys of primary markets directly for price sensitivity every three to five years.

Mason adjusts aid/discount strategies based on prioritizing the neediest students while remaining mindful of the strategic use of aid to achieve both headcount and revenue targets.

- Even with tuition increases, the total COA annual growth of 2.5% over 10 years reflects keeping pace with HEPI & CPI.
- The impact of tuition increases for our neediest students has been offset with increased institutional aid.
- As a result, annual borrowing/FTE (-2.4%) as well as % of students borrowing to attend GMU has declined.

Mandatory non-E&G fees are balanced between the needs to provide co-curricular academic and student service support programming with operational and service costs.

Further aid award strategies include expansion of programming in:

- Mason Virginia Promise
- Stay Mason: emergency assistance funding.
- VMSDEP which has seen significant annual program growth as an unfunded, highly beneficial, mandate.

**D3. What do you expect to be the impact of your pricing/discounting approach on enrollment numbers/mix (if any) and net tuition revenue moving forward and why?**

Mason has a core commitment to affordability and access. Mason's in-state tuition pricing is comparatively low relative to other R1 universities (5<sup>th</sup> of the 6<sup>th</sup> lowest I/S UG tuition among our 6 VA R1 peers), University of Maryland, and other Washington DC universities.

However, in the absence of additional Commonwealth funding through a realignment of funds, Mason will need to increase tuition.

- Given our student population, Mason has substantially increased institutional aid between 2014 and 2022 (11.6%).
- This institutional aid growth has outstripped both Commonwealth financial aid increases and gross tuition revenue increases (6.3%) over the same period.
- Annual net tuition revenue growth has equaled 5.6%.
- Since FY21, Mason has reallocated one-third of additional revenues generated from a tuition rate increase to incremental institutional aid.
  - Doing so has allowed the launch several initiatives to address substantial unmet need, e.g., the Mason VA Promise grants which guarantee gift aid equal to the cost of tuition and fees for in-state undergraduates with an adjusted gross family income below \$60K.
  - The additional institutional aid reallocation has been an important lever in our strategy to achieve freshman and transfer enrollment increases.
- Mason expects to increase enrollment of Pell-Eligible and needy students as a result of our expanded discounting strategy.

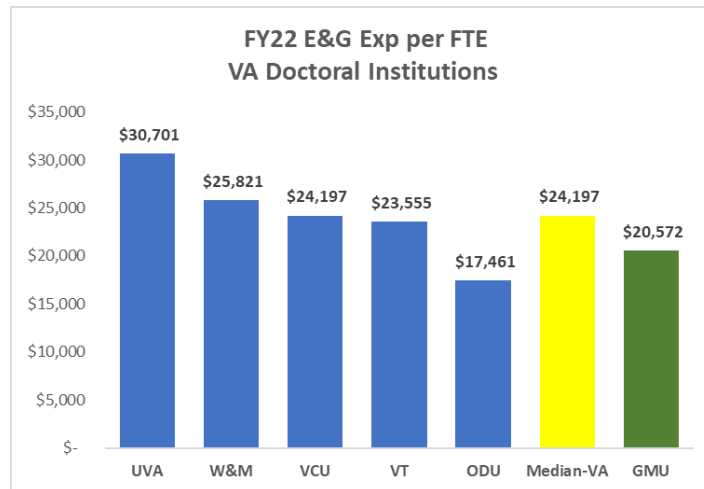
**COST EFFECTIVENESS**

***Key question: How has your institution maintained bottom-line financial health and focused investment on the levers that will drive improvements in student outcomes?***

**D4. Reflect on the categories/subcategories of cost that have recently experienced the most significant increases on an absolute or per-student basis. What have been the primary drivers of those increases? Please be specific and include supporting data.**

As responsible and efficient stewards, Mason is taking steps to be efficient; however, Mason is challenged to optimize excellence given the current funding model in the face of our annual costs as detailed in GMU's Fact Pack slide 47.

- Mason's spending is commensurate with the delivery of our core educational mission.
- While Mason's costs are at the median of all 4-year VA institutions, Mason's FY22 E&G expenses of \$21K per student FTE is 15% below the median of our Commonwealth doctoral peers, i.e., UVA, VT, VCU, ODU, and William & Mary, which stands at \$24K. See chart below.



(FP02: E&G Expenditures by Program & Annual Per FTE)

Top 5 Service Area (Slide 47)

Service Area	Annual Growth	FY22 Spend
General Academic Instruction –\$389M	5.3%	58%
Higher Education Institutional Support-\$81M	6.1%	12%
All Other Subprograms (Academic Support)-\$66M	7.8%	10%
Operations and Maintenance - \$60M	5.4%	9%
Higher Ed Student Services- \$37M	5.1%	6%

Drivers for expense growth:

- Increased compensation driven by market competitiveness and critical retention.
- Post pandemic, compensation costs have increased 9% and 14% in FY22 and FY23, respectively, driven by hiring and market compensation in the highest cost region in the state.
- Although we have made strides in improving compensation competitiveness, we still have market gaps in key functional areas and disciplines that we need to address.
- State provides cost share on authorized 5% salary increase. In FY23 the state provided \$13.4M, ~45% of the total \$30M increase. Mason covered the remainder from tuition. (State policy change recommendation)
- Compensation increases lag approximately one year (State policy change recommendation) and hiring replacements and new positions at market rate has dramatically increased compensation.
- Enrollment growth increases the need for additional student services and personnel to deliver those services.
- Institutional support and Operations & Maintenance expense drivers:
  - Contract Services price escalations (utilities, janitorial services, consultants)

- Increased costs related to compliance (research, foreign influence, Conflict of Interest)
- Previous underinvestment has resulted in infrastructure investment need.
- Optimization of processes and technology improvements, coupled with human resources, to enable efficiency and service delivery expected at an R1/Access institution.

**D5. What specific strategies/actions do you plan to take to contain/reduce key costs and improve fiscal health going forward while improving student outcomes? What are your objectives and what have been your results to date of any already-launched initiatives? What is the expected impact and timeframe of these strategies? Include any short-term costs that would need to be incurred to implement the strategies.**

As a demonstrably efficient institution and responsible steward of Commonwealth resources, our ability to sustain our performance requires a multi-year commitment focused on improving our infrastructure, optimizing and upgrading existing systems, eliminating redundancies and automating processes including:

- Providing greater financial transparency through Banner Optimization/Chart of Accounts. Launched in FY23, this work will allow insight into leveraging our resources and the creation of enhanced analytics/report development.
  - The new Chart of Accounts allows streamlined processes by leveraging system functionality. Mason is currently developing a pilot with selected units for FY24 to quantify savings to assess broader savings targets for FY25.
  - Eliminating resource-wasteful processes such as manual processes, duplicate data entry, etc. with investments in technology solutions (e.g., Automation Center of Excellence).
- Enhancing student support through a student focused CRM to improve student advising, retention and completion FY24-27.
- To improve donor cultivation, fundraising analysis and capacity, through a development focused CRM.
- The implementation of a formal retirement incentive program for both Instructional / Research Faculty and Administrative / Professional Faculty beginning in FY25-26.
- Implement unit reorganizations which requires Commonwealth partnership for exceptions from state code and policies to provide the necessary flexibility to achieve efficiencies and optimizations.
- Enhancing human resources operation through the deployment of technologies to quicken time to hire, performance management processes, class and compensation analyses and process. Tools include Page Up (launched in FY23) Performance Management System (FY25), and other HR Capital Management Systems.
- Replacing the outdated degree audit and scheduler tool to enhance the student experience and allow for integration with other state-level systems such as the TransferVA portal.
- Creating a robust data management program and data infrastructure as part of the Mason Impact: Data to Analytics Solutions (MIDAS) initiative.
- Implementing new Identity and Access management system to enable automatic role-based provisioning to improve efficiency and reduce operational risks.
- Transitioning to a new learning management system in FY24/25 will provide greater flexibility and consistent design elements, increasing value for student users and the faculty who create course content.
- Optimizing space utilization.
- Refining our Electronic-MOU system to better manage contract and negotiation processes.
- Budget Development & Planning Tool (FY25)
- Establishing task forces in a variety of functional areas (HR, research, finance) to explore shared service opportunities in academic and administrative units.
- Collaborations with other institutions such as University of Mary Washington. Current initiatives include:
  - Smithsonian School of Conservation (at which UMW students take GMU courses and spend a semester at the Front Royal, VA facility).
  - Army ROTC program through which UMW students can participate in ROTC through coursework and training offered at UMW.



- Charting pathways from UMW Bachelor's degrees to accelerated GMU Master's degrees.
- Collaborations with external entities (Government, Business, Non-Governmental Organizations, etc.) on projects that are revenue generating.

These strategies will result in long-term savings and Mason is reallocating resources towards these critical cost-saving measures. However, cost will exceed reallocations. Commonwealth support will accelerate our capacity to achieve long-term returns on investments. In the absence of the implementation of an equitable general fund formula, Mason anticipates base budget reductions in FY24 and FY25 to balance our E&G budget.

**D6. Provide information about your institution's highest-priority E&G capital projects and requests (including new construction as well as renovations) over the six-year plan period and how they align to your enrollment trajectory, student outcomes improvement plans, or other strategic priorities. Please also reflect on your current E&G facilities utilization (especially classrooms, labs and student service areas), particularly in light of any recent trends that might impact space needs (e.g., enrollment trends, shifting learning modalities). How has square footage per student changed over time and why? What efforts have you made to reassess and further optimize the use of your existing facilities, and what has been the impact of those efforts to date? What do you intend to do in the next six years to increase utilization?**

## Highest Priority E & G Capital Requests:

CAPITAL NEEDS				Projected Expenditure Plan (\$Ms)							
Capital Project	Campus	Type	GSF	FY24	FY25	FY26	FY27	FY28	FY29	Total GF	Total NGF
<b>E&amp;G Projects</b>											
Real Estate Acquisitions Phase 2 (VSH)	Arlington	New	NA	107	--	--	--	--	--		107
Student Innovation Factory Bldg.	Fairfax	New	205,363	1	13	21	3	--	--	37	
Interdisciplinary Sci. & Eng. Bldg.	Fairfax	New	150,000	0	8	33	67	49	8	165	
Business School	Fairfax	New	150,000	0	13	37	62	46	7	165	
Critical Deferred Maintenance	Fairfax	Reno	0	10	3	2	11	10	--	36	
Academic VIII	Sci Tech	New	200,000	1	26	41	72	52	8	200	
<b>Total</b>										<b>603</b>	<b>107</b>

See <https://planning.gmu.edu/wp-content/uploads/2023/06/FY24-Capital-Budget-Requests.pdf> for details on capital projects above.

Our space data presently reflects nearly a net neutral change to our total assignable square footage (ASF). We anticipate additional ASF with the opening of Fuse at Mason Square and reductions in the off-site lease space needed

- Lessons learned from our successes and abilities to provide instructional alternatives to our students, as well as demand for those online courses, resulted in our emergence from the pandemic with a new steady state with less in-person instruction and more online instruction than before 2020.
- Working to mitigate the impact that shift has on our classroom utilization.
- Transitioning to University Registrar-managed classrooms to increase utilization rates.
- Renovation and operational modifications reflect a reduction in the total number of classrooms scheduled from 432 in 2018 to 393 in 2022 in order to address other campus space needs, preserve our utilization rates, and acknowledge shifts in our need for physical space to meet current instructional needs.

Assessment, Optimization and Future Utilization:

- Continued study to adjust and repurpose our classroom and class lab uses in response to changes in instructional methods and the continued need to improve and expand our inventory of wet labs.
- A 500K square foot program to perform anonymized occupancy detection analyses for all space types occupied by faculty, staff and students to help us better identify underutilized spaces of all types in support of our continued enrollment growth, additional new programs and the corresponding support spaces

Mason is also optimizing space utilization by:

- Realigning administrative and office space given the increase in remote and hybrid work environments.
- Reviewing offsite leased spaces for savings as we more efficiently utilize Mason-owned space.
- Creating financial incentives for units to relinquish underutilized/unused space.

## SECTION E: BUDGET REQUESTS

**E1. Provide additional information for any budget requests in Part I of your planning template that are not described elsewhere in your narrative.**

Mason appreciates and deploys the ~\$4.4M of Higher Education Equipment Trust Fund (HEETF) funding received annually. However, a refresh of the HEETF funding allocation formula that will more equitably align Mason's HEETF funding with other VA R1s in terms of relative institution size and infrastructure support needs for instructional, research, and administrative technologies is requested. Our current allocation is dramatically below our Virginia R1 doctoral peers of similar size.

**SECTION F: ECONOMIC DEVELOPMENT ANNUAL REPORT**

**F1. Provide a link to any report your institution has produced about its economic development contributions. You may also share it in the appendix or as an attachment**

See Appendix C: Briefing Paper GMU Economic Impact FY 2022

**SECTION G: FREEDOM OF EXPRESSION AND INQUIRY, FREE SPEECH, ACADEMIC FREEDOM AND DIVERSITY OF THOUGHT**

**G1. Provide a copy of any policy or reports your institution has produced and provide information about annual training or orientation related to this topic.**

Mason is committed to, and proudly recognized for, fostering an environment that welcomes free speech for all.

- Earns top national ranking ([green light rating](#)) for campus climate from the Foundation for Individual Rights in Education ([FIRE](#)) and ranked 17 in 2023 nationally for encouraging free speech.
- Ranked 7th nationally for being an LGBTQ friendly campus.
- Mason affirms the principles outlined in the Chicago Statement: "the principle that debate or deliberation may not be suppressed because the ideas put forth are thought by some or even by most members of the University community to be offensive, unwise, immoral, or wrong-headed."
- Co-Curricular student programming:
  - "Rights and Responsibilities" during New Student Orientation
  - "Self, Others, and Community" offered during Preamble/Welcome Week and throughout the academic year.
- Course offerings:
  - Schar School of Policy and Government: Civil Rights Law, Social Media Privacy and Innovation, Constitutional Law, Civil Rights and Civil Liberties, and the Democracy Lab Undergraduate Learning Community.
  - Antonin Scalia Law School: Foundational courses in Constitutional Law, Free Speech Clinic, Freedom of Speech and First Amendment Law, training on respectful discussion and debate during orientation;
  - College of Humanities and Social Sciences: Free Speech and Ethics course is offered that satisfies a Mason Core, general education requirement.
- Statement of Faculty Principle: Affirms the faculty's commitment to "respectful debate and the full and open exchange of ideas." Published [here](#).
- Liberty & Law Center's Public Discourse Project
- Mason's provides online resources to guide legal and safe First Amendment expressions at [Mason Climate](#) and [Free Speech at Mason](#).
- The [Student Media](#) offers hands-on training, co-curricular learning experiences, campus-wide events, publishing opportunities to elevate student voices, and connections to practicing media professionals and national organizations that protect free speech.
- Expansion goals:
  - Freedom & Learning Presidential Speaker Series.
  - Freedom of Speech teach-in series.
  - Constructive Dialogue Institute to be incorporated into first-year programming.
  - Expanding freedom of expression modules into student organization leadership training.

## **SECTION H: NEW SCHOOLS, SITES, AND MERGERS**

**H1. Provide information on any new instructional sites, schools, or mergers supported by all types of funding that your institution is considering or planning to undertake during the six-year period.**

- No new instructional sites are currently scheduled for development.
- Plans to change the School of Business to the “College” of Business and increase the number of schools located in the unit, e.g. the formation of a School of Accounting. The approval process for making this shift will be submitted to SCHEV before the end of the 2023 calendar year.
- A strategy to improve recruiting out-of-state students and provide study abroad opportunities for domestic students revolves around locating programs internationally. This includes conversations with our current campus in South Korea, subject to the constraint that any such programs would also have to be self-supporting.
- Building alliances and collaborations with University of Mary Washington including:
  - Smithsonian School of Conservation (at which UMW students take GMU courses and spend a semester at the Front Royal, VA facility).
  - Army ROTC program through which UMW students can participate in ROTC through coursework and training offered at UMW.
  - Charting pathways from UMW Bachelor’s degrees to accelerated GMU Master’s degrees.

#### **[OPTIONAL] SECTION I: RESEARCH**

**I1. [OPTIONAL] Highlight any strategic research priorities, programs, or key areas of investment (e.g., hiring plans, critical research agendas, interdisciplinary centers, business partnerships, commercialization efforts) and IP dissemination and commercialization priorities you intend to pursue over the next 6 years that have not already been mentioned in this narrative. What are the anticipated benefits to your faculty attraction/retention strategy, student value proposition, and the economic competitiveness of the Commonwealth?**

As appropriate for an R1 university with an impressive trajectory, i.e., achieving R1 status after only 43 years as an institution in 2016, Mason supports a wide array of research initiatives with strengths concentrated around key areas of urgent societal need. Driving discovery and the creation of new knowledge, Mason seeks to meet current and future challenges and supports the creation of game-changing opportunities yet to be imagined. The products of Mason's bold research agenda are key resources in our local community, the commonwealth, and the US providing unparalleled access, capacity, and leadership in innovation, job creation, partnerships, workforce development, and economic growth.

Mason supports 908 tenured or tenure-track faculty and continues to attract top research talent to the Commonwealth. These researchers, in turn, provide rich experiences for our students, compelling partners for companies, and engines for economic growth including startups and workforce advancement, reskilling, and expansion opportunities.

Over the past 5-yrs Mason's research enterprise has grown by 105% reaching \$230M in FY22 research expenditures (as measured by the NSF HERD Survey).

- Leveraging national best practices, Mason began a research administration initiative focused on improving processes and tools to better manage the regional and national stakeholder investments in Mason's faculty and student researchers.
- To attract student and faculty researchers, nationally and globally leading educational experiences, industry partnerships, and federal investments, this effort requires extension to drive efficiencies in research operations to support emerging laboratories in areas of intense national interest (e.g., high performance computing, augmented reality, data analytics, infectious diseases, disaster resilience, cybersecurity) including:
  - Computing
    - In addition to funds needed to refresh the Mason computing infrastructure on a 5-year cycle (\$1M Annually), immediate needs include replacing the underlying server infrastructure that underpins much of the Mason computing environment. (\$6M One-time)
    - Management and student support to provide research service and cross-functionality. (\$1.5M Annually)
  - Labs: Manager support for core shared facilities and buildings across campus. (\$600K Annually)
  - Shared service operational support across the Office of Research, Innovation and Economic Impact, beyond research administration. (\$750K Annually)
  - Eminent Scholar program funding to recruit, support and retain top talent and provide leadership support for research institutes. (\$2M Annually). These scholars will lead key transdisciplinary research centers and institutes that address urgent societal needs such as national security (RPRC-\$42M expenditures), sustainability (ISE-\$57M expenditures), biohealth (IBI-\$36M expenditures), and digital innovation (IDIA-\$62M expenditures).
  - Experiential education for our students, such as those engaged with our award-winning Office of Student Scholarship, Creative Activities, and Research (OSCAR) (\$750K Annually)
  - Funds to support the Coulter Program that provides entrepreneurship training to commercialize technologies (\$4M Annually)
  - Mason Enterprise, a proven leader for entrepreneurially focused economic development programming, supports 28 SBDC's and the well-regarded ICAP program among others. Growth in this area to provide full-service tech entrepreneurship support to nascent ventures throughout the commonwealth, these startups will receive industry leading entrepreneurship training, support

for commercialization, and mentorship in order to support the regional development of tech startup culture in key sectors like biohealth, digital innovation, sustainability. To that end, Mason seeks additional support for Tech Mentor funding to enhance federally funded I-Corps Programs, state funded ICAP programs and other commercialization activity to increase the number of new ventures and start-ups. (\$1.4M Annually).

**[OPTIONAL] SECTION J: COLLABORATION**

**J1. [OPTIONAL] Outline any existing or potential initiatives you have not already highlighted in this narrative that feature collaboration across public higher education institutions (and other state agencies as appropriate) in furthering the goals outlined in sections B-D. What is the expected impact and in what timeframe? What is the timeline for the initiative and how far along is it? What (if anything) would be required from a budget or policy perspective to facilitate the success of the initiative?**

Several projects are underway to expand collaborations with other public higher education institutions in the Commonwealth. These partnerships are designed to enhance opportunities and increase affordability for all students to attain a college degree. They include:

- Partnership with the University of Mary Washington to enhance opportunities for graduate work through accelerated Masters' pathways.
- Looking ahead, given geographic proximity, we anticipate several additional options for collaboration with UMW, including faculty and course sharing, shared library resources and services, and programmatic collaboration such as through Honors programs and co-curricular activities.
- Partnership under discussion with Virginia Military Institute to provide accelerated master's pathways for cadets.
- Library collaboration and prospective integration with University of Mary Washington.
- Expansion of the ADVANCE program:
  - Partnerships signed with Piedmont Virginia, Tidewater, and Germanna.
  - Current conversations with Virginia Peninsula, Laurel Ridge and Danville.
  - Given funding, Mason anticipates additional community colleges partnerships over the next six years.
- Development of Lab School proposal to include Mason, Fairfax County Public Schools, and Northern Virginia Community College.
- Mason is a founding partner of the Online Virginia Network, a collaboration between James Madison University, Old Dominion University, and the Virginia Community College system.
- Robotic Process Automation and Centers for Excellence (Tier 3s).
- Governor's School, located on the Science and Technology campus, and operating in collaboration with the Northern Virginia School Divisions, is a successful long-term initiative that attracts high achieving students to STEM fields.
- Expansion of Ellucian (Banner) knowledge share and potential for contract savings through Council of Presidents and Council of State Business Officers.

Mason also engages in a wide breadth of research partnerships including:

- In the context of biohealth, Mason partners with Prince William County through the Institute for Biohealth Innovation that supports life science startups.
- In addition to the Institute for Sustainable Earth, the Virginia Climate Center acts as an extension agency for sustainability and resilience.
- The Institute for Digital Innovation is inclusively shaping the future of our digital society, promoting well-being, security, and prosperity. IDIA is a sector leader that provides transdisciplinary research, innovation, and next-generation workforce development strategy across the university for scaled, sustainable growth in digital innovation
- Leveraging the wealth of national security expertise in Northern Virginia, Mason is building a network focused on rapid, innovative technology start-ups with a defense focus via the Rapid Prototype Research Center.
- Under Auxiliary related projects, we are evaluating our West Campus, Mason Square (Arlington) and SciTech assets for new development partnerships which would provide additional revenues to offset current E&G shortfalls driven by market compensation and funding disparity challenges.

## **[OPTIONAL] SECTION K: STATE POLICY**



**K1. [OPTIONAL] Use this section to outline any state policy changes you have not already mentioned in this narrative that would enhance your ability to achieve greater success on the topics, strategies, and initiatives referenced in this narrative. What existing policies, if any, are hindering your ability to maximize outcomes and value for students? What new policies might create conditions that are more conducive to achieving those goals? What strategies or initiatives would these policy changes enable your institution to do or try that you are not yet able to do today? Please be as specific as possible.**

**Support for current unfunded mandates:**

- VMSDEP: Financial impact of FY23 tuition and mandatory student fee waiver = \$7.7M; Average annual increases of 36% since 2019.
- Compensation increases should be fully funded:
  - The Commonwealth cost share funding lags one year lag, such that the compensation base budget increases are on a lower base than year they are executed.
  - By not fully funding State authorized salary increases (GMU cost share=49.7% on a one-year lag basis) requires institutions to allocate NGF resources to meet compensation requirements that are effectively mandated increases.
- Freedom of Speech orientation and programming mandates
- Increased compliance expectations for distance learning, licensing requirements, and DOE mandates that, in turn, require substantial institutional resources to fulfill.
- Expectations for transfer students and partnership with VCCS through TransferVA requires significant commitment and oversight, including personnel and technology.

**Policy changes:**

- Greater autonomy to manage cash reserves in order to increase interest income and yields to generate additional revenues to support operations (Mason and JMU did not receive cash management authority as Tier 3 institutions).
  - With cash management authority, Mason would invest a portion of reserves that do not require immediate liquidity in low risk, longer duration investments, which could generate more annual interest income than interest income received from the Commonwealth's highly-liquid portfolio. This also increases yield for the Commonwealth as a whole.
  - Remove code requirement to transmit all receipts of state funds to the Treasury for institutions with cash management authority. Currently, institutions wire funds to the state daily, only for the state to wire them back to the institution, resulting in increased administrative burden, inefficiency, and unnecessary transaction fees for both the institution and the Commonwealth.
- Allow Mason to invest auxiliary reserves to purchase revenue-generating component unit assets.
- For institutions of Higher Education, provide for or allow performance-based increases for classified staff, rather than across-the-board increases.
- Policy 1.30 Higher Education exception for Classified Staff and reorganization or layoff – addition of another rubric for measurement vs. identifying least senior employee in the work area for layoff or reorg for comparable position (concern that more recent hires should receive equal consideration depending upon additional job knowledge, performance, capabilities and other) - OR – if positions realigned, ability to consider removal of timeframe for position abolishment in an extraordinary circumstance such as institutional expense reduction in force needs at material level (current DHRM policy states the position cannot be reestablished for one year).

- Procurement terms and conditions flexibility (e.g., ability to accept agreements governed by laws of other states, indemnification, waiver of jury trial, etc.)
  - Commonwealth agencies spend substantive time negotiating with vendors to remove indemnification clauses which are standard business practices. By addressing long standing contract language issues, the Commonwealth will increase efficiency and effectiveness in all state agencies.
- Program 108: Integrate Unfunded Scholarships with Program 108 tuition revenue reallocations since unfunded scholarships reflect need-based aid which institutions fund with tuition revenue reallocation as well. This would simplify administration and reporting of these programs for greater transparency and consistency.
- Allow part-time students to be eligible for state financial aid awards (VGAP). This would significantly benefit the large number of non-traditional students who are completing their undergraduate degrees on a less-than-fulltime schedule due to work commitments or other external factors.
- Reset current process for starting a capital project that currently requires multiple layers of forms and approvals at the start of a project and with every modification. The information is redundant across forms (CO-2, CO-8, BEX), offices (Division of Engineering and Buildings, Department of Planning and Budget), and systems resulting in unnecessary delays and inefficient use of multiple Commonwealth staff resources performing duplicative processes. This would create operational efficiencies and cost reductions across all Commonwealth agencies.
- Accept standard IRS Form W-9 for vendor registrations in lieu of the current COV Substitute W-9. Many businesses/institutions have the IRS form readily available and state agencies can quickly obtain and upload it, whereas completing the COV-specific form creates re-work and inefficiencies for both the state agencies and the vendors

**OPTIONAL] SECTION L: ADDITIONAL INFORMATION**

**L1. [OPTIONAL] Use this final section to provide any additional context and/or supporting materials you feel should be incorporated into the six-year planning process.**

We recommend that the 6-year plan requests include a separate section/category for Unfunded State mandates.



Gregory Washington, Ph.D.  
President

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May 15, 2023

Secretary Aimee Guidera  
Office of the Secretary of Education  
1111 East Broad Street  
4<sup>th</sup> Floor  
Richmond, VA 23219

Secretary Guidera:

Thank you for your letter of May 3 regarding FY24 tuition rates for George Mason University. We continue to share a strong commitment to deliver the highest quality university experience to the Commonwealth while minimizing student exposure to the very real impacts of inflation, regional cost of living, and increasingly intense regional competition.

As always, I respect and appreciate your candor and passion on this topic. And I want to acknowledge the recent, vital increases in state appropriations we have received, which the Youngkin administration has supported and advocated for. Within this spirit of our common cause for strong higher education in Virginia, I am writing to offer you an update and a response to your thoughtful letter.

### **Your request**

I shared your letter with the George Mason Board of Visitors ahead of their deliberations on tuition, and the content of your message was reflected in the board's deliberations. As you may know by now, the Board voted to hold FY 24 tuition increases to \$300 for all students, which is approximately 3 percent for in-state undergraduate students. In addition, it contains a contingency that will erase the increase for in-state undergraduates if the General Assembly and Governor Youngkin are able to enact a budget that includes enough vital funding to offset the foregone revenue that flattening tuition would cause.

### **Context**

As we have discussed and your data highlights, George Mason University is proud to be Virginia's largest provider of higher education. We educate more in-state undergraduates at a lower cost (when one considers our per student subsidy), despite operating in by far the most expensive market in the Commonwealth. This is an accomplishment for which we are very proud. That being said, it also presents us with our enduring challenge, which is how to sustain both our accessibility and our quality – our twin promises of “access to excellence” – on a resource base that is consistently lower than our Virginia peer doctoral universities.

Secretary Aimee Guidera

May 15, 2023

Page 2

While Education and General (E&G) Commonwealth support and base funding have increased in recent years as detailed in your schedule, our total costs of operating have risen significantly due to inflation and from years of underfunding that caught up to us as the pandemic has ended. Our campus is subjected to many of the same cost increases as the broader society and the increased funds we received were not enough to support those cost.

Mason's appropriations per in-state undergraduate FTE have not grown commensurate with or to the total level of general fund support provided for other R1 Commonwealth universities. This is difficult to explain to our faculty, staff and students, especially when Mason has significantly higher operating costs based on its location, where [Kiplinger](#) ranked Washington, DC as the 5<sup>th</sup> most expensive city in the US. Mason is grateful for both the state appropriations of \$42.4 million in student aid received for FY23, as well the \$23 million of additional aid to be received in FY24. Rightly, these appropriations are pass-through dollars that go directly to our students and as such cannot be used for operations.

### **Solving the structural inequity**

I would like to suggest several steps we can take together that would help to address the financial disparities we face without requiring additional resources in FY24, either from the state or from students.

1. Grant Mason greater autonomy to manage its reserves – The state is holding a significant amount of reserves and unlike most other Tier 3 universities, Mason does not have management authority over these funds. This means that other universities are able to deploy the interest on these reserves toward operations, where the state invests a limited percentage of investments and Mason receives limited interest income. If the bulk of Mason's reserves were simply invested in low-risk investments such as U.S. Treasuries, the incremental interest would exceed at least the last two in-state undergraduate tuition increases.
2. Allow Mason to use auxiliary reserves to purchase revenue-generating component assets –Mason would eliminate debt service on component unit facilities and buildings, saving millions of dollars in operating expenses, generating additional resources for Mason and return on investments far exceeding current interest earnings on reserves.

Further context supporting the tuition increase decision and comparison to the Commonwealth R1 institutions is detailed in the attached Appendix and attached reconciliation of E&G funding to your schedule.

Secretary Aimee Guidera  
May 15, 2023  
Page 3

I look forward to continuing our conversation about how together we can find new opportunities to make Virginia's great system of higher education even better. I believe we have a number of viable alternatives and I hope we can agree to pursue them to the benefit of the Commonwealth.

Sincerely,

A handwritten signature in blue ink, appearing to read "Gregory Washington", with a long horizontal flourish extending to the right.

Gregory Washington

**APPENDIX**

Cost of living – Accounting for the basic cost of living is far more expensive for George Mason University than for any other public university in Virginia. That higher cost is borne largely in the salaries we must pay to be competitive, and the goods and services we must purchase to function. Compared to our peer doctoral universities’ communities, [Forbes](#) calculates Northern Virginia’s cost of living as by far higher than Richmond (-57%), Charlottesville (-48%), Blacksburg (-60%), and greater southeast Virginia (-59%).

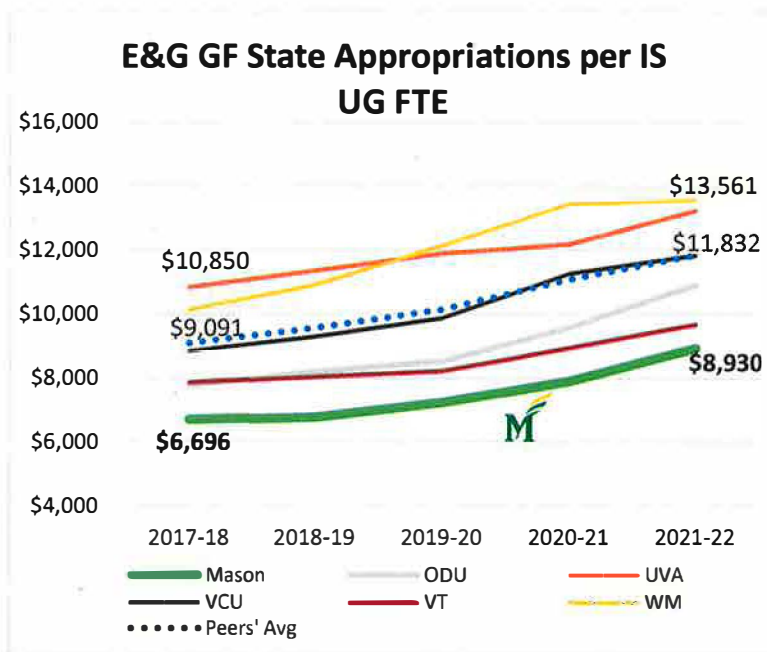
Competition – The vast majority of George Mason’s student body comes from within a 50-mile range of our campuses. George Mason’s “back yard” is one of the most fiercely competitive higher education regions in the nation. In that radius there are eight public and three elite private universities in Maryland, including the University of Maryland’s campuses at College Park and Baltimore County, and Johns Hopkins University. In the District of Columbia there are six elite private institutions including Georgetown, American, George Washington, and Howard universities. And in Northern Virginia, home to 24 of the Commonwealth’s 30 top high schools and 81 percent of Mason’s recent enrollment growth, other Virginia universities are building campuses and marketing aggressively for online enrollment, including campuses planned for Virginia Tech and the University of Virginia, with Old Dominion University aggressively recruiting online students. In all, it is estimated that the DMV region sees about \$300 million in higher education advertising annually, all seeking to draw students out of this attractive base.

No other Virginia university faces such sustained and acute competition in its own region.

Funding disparity – Throughout its history, Mason has done more with less. As Virginia’s overall college enrollment has continued to drop, Mason’s continues to grow. Next week we will celebrate our largest graduating class in Virginia history, and this fall we are on track to welcome the largest incoming class in Virginia history.

Despite that, state appropriations, which account for about 20 percent of our total operating budget, have consistently and significantly lagged our peer doctoral institutions in Virginia. Of these same institutions, Mason has the lowest endowment values, which are an additional source of revenue available to the other R1 institutions.

Using SCHEV General Fund base appropriations data and in-state undergraduate enrollments from FY18 to FY22, you can see that while our own funding per in-state undergraduate FTE has increased from \$6,696 to \$8,930, the average



appropriation of our peers has grown from \$9,091 to \$11,832.<sup>1</sup> Our appropriation per UG FTE ended slightly lower than where the peer average began in FY18.

### **Costs in detail**

Specific demands that drive Mason's need for more equitable funding include increases in compensation and increased demand for student financial aid. Put another way, we are trying to take care of our students, and we are trying to take care of our faculty and staff. Our vision is to remove financial roadblocks from our students' journey to graduation, and we want our faculty and staff to be compensated on par with their competitors and the communities they serve.

Student financial aid – As Virginia's No. 1 educator of in-state undergraduate students, Mason also enrolls the most students with greatest financial need of any doctoral university in Virginia. In FY22, SCHEV data indicates that 7,630 students receiving aid (56.1 percent of all aid recipients) had a family income of \$50,000 or less, and 9,501 Mason students had an expected family contribution of less than \$7,500 per year.

Mason is grateful for the state appropriations of \$42.4 million in student aid that Mason received for FY23. Mason is also extremely grateful for the \$23 million in additional aid to be received in FY24. Rightly, these appropriations are pass-through dollars that go directly to our students. They do not cover the incremental operating expenses necessary to make such aid available to them.

Compensation demands – Post-pandemic demands for better employment compensation have increased acutely, and Mason is behind the market and its peers. This presents the very real danger of "brain drain" that will have very direct impact on the quality of the student experience.

To counteract this challenge, Mason has deployed targeted salary increases in addition to the state mandated increases to close the gap between our compensation and the market. The combined effect of the state increases, targeted supplemental increases, and additional hires (both filling existing vacancies and new positions to meet current demands) is that Mason experienced a 9 percent increase in overall compensation expense in FY22 and is projecting a 14% increase for FY23. While Mason does receive incremental appropriations for a portion of the state mandated increase each year, we have had to self-finance the majority of these increased costs.

<sup>1</sup> This ratio differs from SCHEV's standard calculation of appropriations per all in-state FTE's, but approximates the calculation provided by your office for Mason's E&G support per UG FTE. The calculation *does not* include the annual central adjustments for salary cost share, as that information is not published.

**George Mason University  
2023 Six-Year Plan  
New Degree Programs**

**Carter School**

**Degree Program Name CIP Code**

- MA Dispute Resolution 30.2801  
George Mason University is the only four-year, public institution in the Commonwealth that is currently offering a graduate dispute resolution program. We are building upon the success of a graduate certificate in Contemporary Dispute Resolution.
- BA Organizational Dispute Resolution 30.2801  
George Mason University is the only four-year, public institution in the Commonwealth that is currently offering an undergraduate organizational conflict program, we are building upon the success of a minor in Organizational conflict.

**College of Engineering and Computing**

**Degree Program Name CIP Code**

- PhD Mechanical Engineering 14.1901  
Mechanical engineering is a foundational discipline to any R1 institution's research and teaching mission. This degree program is required to serve the people of Northern Virginia who do not have access to a ME PhD at a Virginia public institution in the region.
- PhD Robotics 14.4201  
George Mason has a unique combination of faculty expertise and student interest in Robotics. Robotics is an emerging field and we anticipate significant demand for PhD level engineers to teach and conduct research in this area.
- MS Data Science 30.3001  
Mason has excellent expertise in foundations of data science (Statistics, Computer Science) and there is considerable demand for students due to potential job opportunities in the region.
- MS Network Engineering 14.1004  
Mason CEC provides the comprehensive educational pipeline for all networks engineering technologies. Network Engineering encompasses Cloud computing, data centers, wireless communications, IoT, mobile devices, fiber optics, etc., and networking is an engineering exercise matching up bandwidth, routing, services, storage, accessibility, etc. in order to provide seamless services
- MS Peace Engineering 14.9999  
Mason's location in the National Capital Region, an area with many organizations (both NGOs and government) undertaking peace-supporting initiatives, makes it well-suited to lead in this application of engineering with collaboration between the Carter School and CEC.
- MS Autonomous Systems/Responsible AI 14.4201  
The proposed master's program will serve the specific needs of government and industry in the responsible and ethical development of AI for autonomous systems.

**College of Education and Human Development**

**Degree Program Name CIP Code**

- EdS School Psychology 42.2805  
Mason has long offered the MA in Psych, Cert in School Psych and will build on expertise, coursework and capacity moving to the MA and EdS: The EdS degree is now the standard degree for School Psych, recognized by the National Association of School Psychologists (NASP)



- MEd Education Leadership 13.0401  
Mason has long offered a program toward VDOE Administration and Supervision license producing the majority of ed leaders in Northern Va and VA: a program name change (and SCHEV inventory cleaning) from MED Leadership and Development to MED Education Leadership requires a new degree proposal yet builds on existing program, coursework, expertise and capacity
- BSEd Secondary Education 13.1205  
Mason has since inception offered a master's in curriculum and instruction toward VDOE endorsement in Secondary Education: to address the critical shortage for teachers, instruction at the BSEd level beyond an UG certificate is necessary and builds on existing capacity.
- MEd Early Childhood Education/ECSE for Diverse Learners 13.1210  
Mason has since inception offered a master's in curriculum and instruction concentration toward VDOE endorsement in Early Childhood and Early Childhood Special Education: to address the critical shortage for teachers, creating a standalone degree is necessary, builds on existing capacity, and addresses SCHEV concerns for embedded concentrations having evolved without a common degree core.
- MEd Elementary Education 13.1202  
Mason has since inception offered a master's in curriculum and instruction concentration toward VDOE endorsement in Elementary Education: to address the critical shortage for teachers, creating a standalone degree is necessary, builds on existing capacity, and addresses SCHEV concerns for embedded concentrations having evolved without a common degree core.
- MEd Literacy 13.1315  
Mason has long offered a master's in curriculum and instruction concentration toward VDOE endorsement in Reading and Literacy: to address the critical shortage for teachers, creating a standalone degree is necessary, builds on existing capacity, and addresses SCHEV concerns for embedded concentrations having evolved without a common degree core.
- MEd Secondary Education 13.1205  
Mason has since inception offered a master's in curriculum and instruction concentration toward VDOE endorsement in Secondary Education: to address the critical shortage for teachers, creating a standalone degree is necessary, builds on existing capacity, and addresses SCHEV concerns for embedded concentrations having evolved without a common degree core.
- BS Hospitality Tourism and Events Management 52.0903  
Mason has long offered the BS in Tourism and Events Mgt: to address a shortage in the VA workforce in hospitality, events and tourism services, a program name change from BS TEM to BS HTEM requires a new degree proposal yet builds on existing program, coursework, expertise and capacity
- BSEd Teaching English to Speakers of Other Languages and World Languages (Pk-12) 13.1401  
Mason has long offered a master's in curriculum and instruction toward VDOE endorsement in foreign languages (and TESOL): to address the critical shortage for teachers, instruction at the BSEd level is necessary and builds on existing expertise and capacity.
- MEd Teaching English to Speakers of Other Languages (Pk-12) 13.1401  
Mason has long offered a master's in curriculum and instruction concentration toward VDOE endorsement in foreign languages (and TESOL): to address the critical shortage for teachers, creating a standalone degree is necessary, builds on existing capacity, and addresses SCHEV concerns for embedded concentrations having evolved without a common degree core.
- MEd Mathematics Specialist Leader 13.1311  
Mason has long offered a master's concentration in mathematics specialist leadership: to address the shortage for those with advanced preparation in mathematics leadership, creating a standalone degree is

necessary, builds on existing capacity, and addresses SCHEV concerns for embedded concentrations having evolved without a common degree core.

MEd Learning Technologies in Schools 13.0501  
Mason has long offered a master's in curriculum and instruction, concentrations in learning technologies in schools: to address the essential need for teachers skilled in the use of emerging technologies, creating a standalone degree is necessary, builds on existing capacity, and addresses SCHEV concerns for embedded concentrations having evolved without a common degree core.

### **College of Humanities and Social Sciences**

**Degree Program Name CIP Code**

MA Asian Studies 05.0103  
This interdisciplinary degree program will take advantage of Mason's existing strengths and the Mason Korea campus. This degree program will integrate courses from languages, cultural studies, history, economics, and literature. Northern Virginia boasts diverse Asian communities, and the degree can recruit from regional populations and engage in community-based research.

MA Linguistics 30.4801  
This degree program will capitalize on the recent development of linguistics as a STEM field, engaging computational linguistics, building off the existing linguistics curriculum in the MA in English, and cultivating partnerships with psychology and computing.

MP Science Communication 09.0905  
This degree program will address regional market demands in science communication and build on existing department curriculum strengths.

BA Asian Studies 05.0103  
This interdisciplinary degree program will take advantage of Mason's existing strengths and the Mason Korea campus with coursework in language instruction, literature, cultural studies, film, history, economics, religion, and philosophy.

BS Global Affairs 45.0901  
This degree designation will complement the existing BA program with specialized coursework in quantitative methods, program analysis, and experiential learning, taking advantage of Mason's strategic location and regional relationships with international development and humanitarian assistance.

BS Intelligence Studies 42.2701  
This degree program will capitalize on one of Mason's most popular minors by expanding the course offerings. This program adds an experiential learning component, building upon the existing relationship with the region's intelligence community, while offering practical skills in research methods, data gathering, and analysis.

BS Economics 45.0603  
This degree program will enhance Mason's already nationally-recognized Economics offerings with a STEM-designation that will increase access for international students and facilitate bachelor to graduate pathways in the program.

### **College of Public Health**

**Degree Program Name CIP Code**

PhD Health Informatics 51.2706  
The Department of Health Administration has health informatics faculty conduct original research in several areas related to health informatics, health information technology, and health services research. The department also has three established health informatics labs: The Health Informatics Learning Lab (HILL), The Center for Discovery Science and Health Informatics (DSHI), and The Machine Learning and

Inference Laboratory (MLI). The Department of Health Administration is poised to successfully support PhD students in this field with our already established resources.

- PhD Social Work 44.0701  
 The College of Public Health has been preparing students to become social work leaders, scholars, and clinicians for more than 40 years. The Department of Social Work is poised to respond to pressing societal challenges in Virginia, including the Virginia Governor's Healthcare Workforce Roundtable first held in 2019 focusing on developing strategies in healthcare workforce. Adding a PhD program will only enhance the opportunities for students and faculty for little additional resources.
- BS Nutrition 51.3102  
 The Department of Nutrition and Food Studies faculty collaborate with disciplines such as computer science, education, nursing, social work, and political science to explore the causes and develop relevant means of intervening to improve nutrition and health in individuals, communities, and populations.

**College of Science**

**Degree Program Name CIP Code**

- PhD Geology and Earth Science 40.0601  
 With its faculty expertise, Mason is unique prepared to fulfill the commonwealth's need for Earth scientists who are prepared to handle energy resources, coastal erosion threats, and climate change.
- PhD Integrative Biology 26.9999  
 With our multidisciplinary research team and the evolution of integrative science programs at NIH and NSF, Mason is well-suited to develop an Integrative Biology Ph.D. program to meet the workforce's needs.
- MS Ecological Sustainability and Energy 30.3301  
 The department's facilities, faculty specialties, and course offerings in water science, ecotoxicology, and the nexus of water and energy will drive the success of the degree.
- MS/PSM Genetic Counseling 51.1509  
 Given our excellent background in biology, genetics, and public health education, Mason is well-suited to provide a Genetics Counseling MS that will meet the needs of the field's growing workforce.
- MS Geology 40.0699  
 With program offerings at the bachelor's, and soon PhD level, the department is well-prepared to welcome students into a master's level Geology program.
- MS Integrative Biology 26.9999  
 With our multidisciplinary research team and the evolution of integrative science programs at NIH and NSF, Mason is well-suited to develop an Integrative Biology MS program to meet the workforce's needs.
- MS/PSM Medical Laboratory Science 51.1005  
 With a demonstrated history of success in its Medical Laboratory Science, BS, the progression into offering a master's program is a natural one that Mason is well-prepared to assume.
- MS Urban Science 45.1201  
 Considerable faculty hires, research funding, industry partners, and established undergraduate curricular offerings support the department's expansion into an Urban Planning, MS.

**College of Visual and Performing Arts**

**Degree Program Name CIP Code**

- PhD Serious Games 50.0411

Mason's long-established reputation in the field of serious games (VSGI having been founded in 2014), combined with the presence of world-renowned faculty and external researchers' lab spaces, will allow for our future students' unique opportunities in the research and scholarship of game design.

BA Arts and Aesthetics 50.0201

Mason is well-suited to succeed in offering a BA in Arts and Aesthetics due to the wide range of artistic practices already taught in the College of Visual and Performing Arts, the faculty's commitment to multidisciplinary teaching and research, and the region's dynamic arts and cultural sector.

#### **Scalia Law School**

**Degree Program Name CIP Code**

LLM General Studies 24.0102

The LLM will meet the demand for students to obtain the educational credits needed to qualify for a Bar exam or to obtain a legal specialization.

**Schar School of Policy and Government**

No degree programs in development at this time.

**School of Business****Degree Program Name****CIP Code**

MS      Supply Chain Management      52.0203

The School of Business has a formidable group of faculty who specialize in studying supply chain-related issues and consistently publish their research in prestigious journals like Management Science and Manufacturing & Service Operations Management. For many years, we have been offering supply chain-related graduate courses, including specialized instruction in sustainable supply-chain operations. George Mason University possesses extensive research and teaching proficiency in Analytics, which has emerged as a pivotal element in achieving effective supply chain management.

**BRIEFING PAPER<sup>1</sup>**  
**Economic Contributions of George Mason University**  
**Commonwealth of Virginia**  
**Fiscal Year 2022**

George Mason University emerged from the challenges of the COVID-19 pandemic as a stronger, more impactful university providing education, personal growth and workforce readiness to more than 39,000 students while deepening its connections with business leaders, especially those in emerging technology sectors. George Mason remains Virginia’s largest contributor to its tech talent labor force. The following reports an update to our analysis of the economic contributions of George Mason University through its budgeted expenditures and related spending on the state economy.

This analysis includes spending related to university operations, on campus student and visitor spending, student spending for off-campus housing and living expenses, and off-campus spending by campus visitors for lodging, dining, local transportation and other travel expenses. It also includes the impacts of capital spending projects occurring within Fiscal Year 2022. Finally, the analysis includes operating expenditures by the GMU Foundation. Foundation contributions for scholarships and research are counted within university operations. The estimates presented below are based on the IMPLAN economic input-output model that provides estimates of direct, indirect, and induced economic impacts. Direct impacts capture the spending by the university, students, visitors, and closely related entities. Indirect impacts represent economic spillovers that flow to vendors, contractors, and suppliers of goods and services to the university. Induced impacts come from staff, faculty, and employees of vendors spending a portion of their earnings in the Virginia economy. The contributions are expressed as total economic activity (a measure of business transactions), value added (gross state product), labor income (salaries, wages, and benefits), and employment (headcount jobs). In addition, the model provides estimates of state government revenues from taxes, fees and other sources, which we adjust to account for the university’s tax-exempt status.

It is important to recognize that this analysis does not include many other sources of economic benefits realized by residents and businesses of the Commonwealth of Virginia through the efforts of GMU students, faculty, and staff. These “other” impacts include pecuniary and non-pecuniary benefits such as GMU programs that support small business and entrepreneurial growth and development, the contributions of students who provide their talents as interns, apprentices, and eventually employees of Virginia companies, the value of technologies and research developed on GMU campuses, the contributions of faculty and staff as advisors to businesses, governments, and non-profit organizations, and the community development benefits of the GMU family supporting and assisting community organizations.

The analysis is based on Fiscal Year 2022 data, which ended June 30, 2022. Total spending by key categories include:

- Capital expenditures totaled \$46 million.
- Operations expenditures totaled \$976.4 million.

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<sup>1</sup> Prepared by Dr. Terry L. Clower, Director Center for Regional Analysis and the Stephen Fuller Institute, June 2023.

- Student and visitor spending totaled \$148.3 million.
- The GMU foundation spent \$2.5 million for operations, not including funds transferred to GMU for scholarships and other support that are included in university spending.

Based on the analysis, recurring operations at the university and related spending generated \$2.1 billion in economic activity in Virginia, increased total gross state product by \$1.4 billion, and supported over 19,600 jobs that paid more than \$1 billion in salaries, wages, and benefits (see Table below). Even though the university does not directly pay taxes, its recurring economic contributions supported \$37.8 million in revenue for state government in FY2022.

Capital spending at GMU campuses declined in FY2022 compared to FY2020, but still totaled about \$46 million. This spending boosted state economic activity by \$74.7 million, increased total state product by \$45 million, added \$30.7 million in state labor income, supported almost 500 jobs, and increased state tax revenues by \$703,000.

Combining operations and capital economic contributions, in FY2022, George Mason University created almost \$2.2 billion in statewide economic activity, increased gross state product by \$1.4 billion, and supported over 20,100 jobs that paid \$1.06 billion in salaries, wages, and benefits. University operations and capital spending at GMU generated almost \$38.5 million in new tax revenues for the Commonwealth of Virginia.

In addition, Mason Enterprise is the host to federal, state, and local programs that support entrepreneurs and small businesses. Last year’s impact was \$3.36 billion, achieved through 40,000 hours of 1:1 counseling to 10,000 small businesses, 1,600 training programs for 30,000 attendees, and 550+ companies incubated. 61% of businesses served were woman-owned, 46% were minority-owned, and 15% were veteran-owned. The bulk of this increase in impact was the availability of more federal government contracting funds, for which we ensured Virginia small businesses benefitted. Additionally, the second largest growth area is tech start-ups, which continue to increase their ability to launch revenue-generating products and raise venture capital through Mason supported programs.

**Economic Contributions of George Mason University  
Commonwealth of Virginia  
Fiscal Year 2022**

Description	Contribution
<b>University Operations</b>	
<b>Output (business transactions)</b>	\$ 2,133,988,000
<b>Value Added (gross state product)</b>	\$ 1,375,021,000
<b>Labor Income (salary, wages, benefits)</b>	\$ 1,034,926,000
<b>Employment (headcount jobs)</b>	19,621
<b>State Tax Revenues</b>	\$ 37,775,233
<b>Capital Spending</b>	
<b>Output (business transactions)</b>	\$ 74,667,000
<b>Value Added (gross state product)</b>	\$ 45,037,000
<b>Labor Income (salary, wages, benefits)</b>	\$ 30,667,000

<b>Employment (headcount jobs)</b>	488
<b>State Tax Revenues</b>	\$ 703,000
<b>Total</b>	
<b>Output (business transactions)</b>	\$ 2,188,655,000
<b>Value Added (gross state product)</b>	\$ 1,420,058,000
<b>Labor Income (salary, wages, benefits)</b>	\$ 1,065,593,000
<b>Employment (headcount jobs)</b>	20,109
<b>State Tax Revenues</b>	\$ 38,478,000

Sources: GMU, IMPLAN, Center for Regional Analysis. Note estimate totals may not sum due to rounding.