

INSTRUCTIONS FOR SUBMITTING 2023 INSTITUTIONAL SIX-

Due Date: July 17, 2023

PLEASE READ INSTRUCTIONS CAREFULLY

Six-year Plan Requirement

The Higher Education Opportunity Act of 2011 (TJ21) requires Virginia's public institutions of higher education to prepare and submit six-year plans. (See below for complete code reference.) During the 2015 General Assembly session, joint resolutions approved by the House (HJR 555) and Senate (SJ 228) also require that the mission, vision, goals, and strategies expressed in the Virginia Plan, the statewide strategic plan, guide the development

2023 Six-Year Plan Format

The 2023 Six-Year Plan consists of a workbook and an accompanying narrative. The workbook has an Instructions page, Institution ID page and eight parts/worksheets: Enrollment, Undergraduate Tuition and Fee Increase Rates, Revenue, Financial Aid, Academic-Financial, General Fund (GF) Request, and Pro Forma. **Note: Shaded cells contain formulas.** Instructions for the narrative are provided in a separate attachment. Though the The 2023 Six-Year Plans are due July 17, 2023. The review group (referred to as Op Six) as outlined in § 23.1-306 - see Legislative Reference section below - will meet with each institution in August to review the institution's plan and provide comments. If changes to the plans are

INSTRUCTIONS FOR SECTIONS

1. Undergraduate Tuition and Fee Increase Rate Plan

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

2. Revenue

For FY2023- FY2026: 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

For 2027-FY2030: 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

3. Financial Aid

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

4. Academic-Financial Plan

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 For the 2026-28 bienium and 2028-2030 bienium, 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.

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

The Virginia Plan has three major goals (please refer to the Plan at <https://www.schev.edu/research-publications/strategic-plan> for more information about the GOAL 1 EQUITABLE: CLOSE ACCESS AND COMPLETION GAPS.

GOAL 2 AFFORDABLE: LOWER COSTS TO STUDENTS.

GOAL 3 TRANSFORMATIVE: EXPAND PROSPERITY.

5. Six-Year Pro Forma Calculations

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

6. General Fund (GF) Request

Instructions: Indicate items for which you anticipate making a request for state general fund in the 2024-26 biennium. The item can be a supplement to a strategy or item from the academic and financial plan or it can be a free-standing request for which no tuition revenue would be used. If it is a supplement to a strategy or item from the academic and financial plan, use the same title used in Part 4 and place it in bold print to draw attention to its connection to Part 6. Also, describe in the Notes column how additional general fund will enhance or expand the strategy. Requests for need-based financial aid appropriated in program 108 should be included here. If additional rows are added, please update the total costs formulas.

Enrollment/Degree Projections: Detailed six-year enrollment/degree projections are being collected through a separate process. These projections will be incorporated in the Six-Year

BOV Approval: Final board approval of the Six-Year Plan should be done at the earliest possible fall meeting. HB 897 (2018) specified that initial plans do not get posted on the General Assembly's website and that final plans should be submitted to DLAS no later than December 1. However, we are requesting that institutions submit final plans with their

Accessibility: All files need to be checked for accessibility prior to submitting them.

Information on accessibility is provided at this link on SCHEV's website:

<http://schev.edu/index/accessibility/creating-accessible-content>. The first link, "How to Make

Contacts for Questions:

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Academic - Joe DeFilippo (joedefilippo@schev.edu)

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

Legislative Reference:

§ 23.1 - 306. Institutional Six-Year Plans.

A. The governing board of each public institution of higher education shall (i) develop and adopt biennially and amend or affirm annually a six-year plan for the institution; (ii) submit such plan to the Council, the General Assembly, the Governor, and the Chairmen of the House Committee on Appropriations, the House Committee on Education, the Senate Committee on Education and Health, and the Senate Committee on Finance no later than July 1 of each odd-numbered year; and (iii) submit amendments to or an affirmation of that plan no later than July 1 of each even-numbered year or at any other time permitted by the Governor or General Assembly to the Council, the General Assembly, the Governor, and the Chairmen of the House Committee on Appropriations, the House Committee on Education, the Senate Committee on Education and Health, and the Senate Committee on Finance. Each such plan and amendment to or

B. The Secretary of Finance, Secretary of Education, Director of the Department of Planning and Budget, Executive Director of the Council, Staff Director of the House Committee on Appropriations, and Staff Director of the Senate Committee on Finance, or their designees, shall review each institution's plan or amendments and provide comments to the institution on

C. Each plan shall be structured in accordance with, and be consistent with, the objective and purposes of this chapter set forth in § 23.1-301 and the criteria developed pursuant to § 23.1-309 and shall be in a form and manner prescribed by the Council, in consultation with the Secretary of Finance, the Secretary of Education, the Director of the Department of Planning

D. Each six-year plan shall (i) address the institution's academic, financial, and enrollment plans, including the number of Virginia and non-Virginia students, for the six-year period; (ii) indicate the planned use of any projected increase in general fund, tuition, or other nongeneral fund revenues; (iii) be based upon any assumptions provided by the Council, following consultation with the Department of Planning and Budget and the staffs of the House

- 1. Financial planning reflecting the institution's anticipated level of general fund, tuition, and*
- 2. The institution's anticipated annual tuition and educational and general fee charges required by (i) degree level and (ii) domiciliary status, as provided in § 23.1-307;*
- 3. Plans for providing financial aid to help mitigate the impact of tuition and fee increases on low-income and middle-income students and their families as described in subdivision 9,*
- 4. Degree conferral targets for undergraduate Virginia students;*
- 5. Plans for optimal year-round use of the institution's facilities and instructional resources;*
- 6. Plans for the development of an instructional resource-sharing program with other public institutions of higher education and private institutions of higher education;*
- 7. Plans with regard to any other incentives set forth in § 23.1-305 or any other matters the*
- 8. The identification of (i) new programs or initiatives including quality improvements and (ii) institution-specific funding based on particular state policies or institution-specific programs, or*
- 9. An institutional student financial aid commitment that, in conjunction with general funds appropriated for that purpose, provides assistance to students from both low-income and middle-income families and takes into account the information and recommendations resulting*

E. In developing such plans, each public institution of higher education shall consider potential future impacts of tuition increases on the Virginia College Savings Plan and ABLE Savings Trust Accounts (§ 23.1-700 et seq.) and shall discuss such potential impacts with the Virginia

F. 1. In conjunction with the plans included in the six-year plan as set forth in subsection D, each public institution of higher education, Richard Bland College, and the Virginia Community College System may submit one innovative proposal with clearly defined performance measures, including any request for necessary authority or support from the Commonwealth, for a performance pilot. If the General Assembly approves the proposed performance pilot, it shall include approval language in the general appropriation act. A performance pilot shall advance the objectives of this chapter by addressing innovative requests related to college access, affordability, cost predictability, enrollment management subject to specified

2. A performance pilot may include or constitute an institutional partnership performance agreement, which shall be set forth in a memorandum of understanding that includes mutually dependent commitments by the institution, the Commonwealth, and identified partners, if any, related to one or more of the priorities set forth in subdivision 1 or set forth in a general

3. No more than six performance pilots shall be approved in a single session of the General

4. Development and approval of any performance pilot proposal shall proceed in tandem with

a. An institution that intends to propose a performance pilot shall communicate that intention as early as practicable, but not later than April 1 of the year in which the performance pilot will be proposed, to the reviewers listed in subsection B, the co-chairmen of the Joint Subcommittee on the Future Competitiveness of Virginia Higher Education, and the Governor. In developing a proposed performance pilot, the institution shall consider the Commonwealth's educational and economic policies and priorities, including those reflected in the Virginia Plan for Higher Education issued by the Council, the economic development policy developed

b. An institution that submits a performance pilot shall include the one innovative proposal with clearly defined performance measures, and any corresponding authority and support requested from the Commonwealth, with its submission of the preliminary version of its six-

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

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

Part 1: Undergraduate Tuition and Mandatory Fee Increase Plans in 2024-26 Biennium
Old Dominion 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	\$7,590	\$8,045	6.0%	\$8,528	6.0%	
In-State UG Mandatory E&G Fees	\$18	\$18	0.0%	\$18	0.0%	
In-State UG Mandatory non-E&G Fees	\$4,654	\$4,794	3.0%	\$4,937	3.0%	
In-State UG Total	\$12,262	\$12,857	4.9%	\$13,483	4.9%	
Out-of-State UG Tuition	\$27,465	\$28,289	3.0%	\$29,138	3.0%	
Out-of-State UG Mandatory E&G Fees	\$543	\$543	0.0%	\$543	0.0%	
Out-of-State UG Mandatory non-E&G Fees	\$4,654	\$4,794	3.0%	\$4,937	3.0%	
Out-of-State UG Total	\$32,662	\$33,626	3.0%	\$34,618	3.0%	

**Part 2: Revenue: 2022-23 through 2029-30
Old Dominion 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.			
E&G Programs																		
Undergraduate, In-State	\$90,787,202	\$95,506,123	5.2%	\$99,835,129	4.5%	\$104,401,923	4.6%	\$102,646,879	-1.7%	\$100,891,835	-1.7%	\$99,136,791	-1.7%	\$99,136,791	0.0%		%	1.3%
Undergraduate, Out-of-State	\$18,372,341	\$18,236,963	-0.7%	\$18,280,314	0.2%	\$18,215,368	-0.4%	\$17,621,777	-3.3%	\$17,028,186	-3.4%	\$16,434,595	-3.5%	\$16,434,595	0.0%		%	-1.6%
Graduate, In-State	\$20,448,231	\$21,376,032	4.5%	\$22,618,910	5.8%	\$24,102,479	6.6%	\$24,160,261	0.2%	\$24,191,495	0.1%	\$24,409,833	0.9%	\$24,409,833	0.0%		%	2.6%
Graduate, Out-of-State	\$6,413,725	\$6,059,153	-5.5%	\$5,974,126	-1.4%	\$5,837,386	-2.3%	\$5,586,777	-4.3%	\$5,336,168	-4.5%	\$5,085,560	-4.7%	\$5,085,560	0.0%		%	-3.3%
Law, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%		%	%
Law, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%		%	%
Medicine, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%		%	%
Medicine, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%		%	%
Dentistry, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%		%	%
Dentistry, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%		%	%
PharmD, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%		%	28%
PharmD, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%		%	6%
Veterinary Medicine, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%		%	%
Veterinary Medicine, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%		%	%
First Professional, In-State (Total)	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%		%	%
First Professional, Out-of-State (Total)	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%		%	%
Other NGF	\$19,767,419	\$20,755,790	5.0%	\$21,793,579	5.0%	\$22,883,258	5.0%	\$24,027,421	5.0%	\$23,808,253	-0.9%	\$25,228,792	6.0%	\$25,228,792	0.0%		%	3.5%
Total E&G NGF Revenue	\$155,788,918	\$161,934,061	3.9%	\$168,502,058	4.1%	\$175,440,414	4.1%	\$174,043,115	-0.8%	\$171,255,937	-1.6%	\$170,295,571	-0.6%	\$170,295,571	0.0%		%	1.3%
E&G GF Revenue (assume flat after 2024)	\$178,801,060	\$185,637,784	3.8%	\$185,637,784	0.0%	\$185,637,784	0.0%	\$185,637,784	0.0%	\$185,637,784	0.0%	\$185,637,784	0.0%	\$185,637,784	0.0%		%	0.5%
Total E&G Revenue	\$334,589,978	\$347,571,845	3.9%	\$354,139,842	1.9%	\$361,078,198	2.0%	\$359,680,899	-0.4%	\$356,893,721	-0.8%	\$355,933,355	-0.3%	\$355,933,355	0.0%		%	0.9%

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	\$55,725,609	\$57,521,370	3.2%	\$59,932,395	4.2%	\$62,188,699	3.8%	
All Other students	\$10,979,134	\$11,165,199	1.7%	\$11,780,299	5.5%	\$12,429,285	5.5%	
Total non-E&G fee revenue	\$66,704,743	\$68,686,569	3.0%	\$71,712,694	4.4%	\$74,617,984	4.1%	
Total Auxiliary Revenue	\$140,288,472	\$124,057,472	-11.6%	\$130,217,140	5.0%	\$136,705,436	5.0%	

Part 3: Financial Aid Plan: 2022-23 through 2029-30
Old Dominion 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

T&F Used for Financial Aid	*2022-23 (Actual) Please see footnote below							Implied Discount Rate	Compliance with § 4-5.1.a.i
	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)		
Undergraduate, In-State	\$90,787,202	\$5,901,168	6.5%	\$5,901,168	\$153,866	\$16,990,376	\$107,931,444	15.9%	\$0 Compliant
Undergraduate, Out-of-State	\$18,372,341	\$1,139,085	6.2%	\$1,139,085	\$226,054	\$566,238	\$19,164,633	4.1%	
Graduate, In-State	\$20,448,231	\$858,176	4.2%	\$858,176	\$1,724,143	\$1,851,975	\$24,024,349	14.9%	
Graduate, Out-of-State	\$6,413,725	\$429,088	6.7%	\$429,088	\$6,194,087	\$25,951	\$12,633,763	49.2%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$136,021,499	\$8,327,517	6.1%	\$8,327,517	\$8,298,150	\$19,434,540	\$163,754,189	16.9%	

T&F Used for Financial Aid	2023-24 (Estimated)							Implied Discount Rate	Compliance with § 4-5.1.a.i
	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)		
Undergraduate, In-State	\$95,506,123	\$2,714,818	2.8%	\$2,714,818	\$157,824	\$14,931,585	\$110,595,532	13.8%	\$0 Compliant
Undergraduate, Out-of-State	\$18,236,963	\$478,066	2.6%	\$478,066	\$224,424	\$562,156	\$19,023,543	4.1%	
Graduate, In-State	\$21,376,032	\$93,780	0.4%	\$93,780	\$1,802,373	\$1,936,005	\$25,114,410	14.9%	
Graduate, Out-of-State	\$6,059,153	\$40,854	0.7%	\$40,854	\$6,120,143	\$25,641	\$12,204,937	50.4%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$141,178,271	\$3,327,518	2.4%	\$3,327,518	\$8,304,764	\$17,455,387	\$166,938,422	15.4%	

T&F Used for Financial Aid	2024-25 (Planned)							Implied Discount Rate	Compliance with § 4-5.1.a.i
	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)		
Undergraduate, In-State	\$99,835,129	\$2,714,818	2.7%	\$2,714,818	\$165,204	\$15,629,833	\$115,630,166	13.7%	\$0 Compliant
Undergraduate, Out-of-State	\$18,280,314	\$478,066	2.6%	\$478,066	\$224,993	\$563,581	\$19,068,888	4.1%	
Graduate, In-State	\$22,618,910	\$93,780	0.4%	\$93,780	\$1,907,169	\$2,048,571	\$26,574,650	14.9%	
Graduate, Out-of-State	\$6,059,126	\$40,854	0.7%	\$40,854	\$6,034,261	\$25,281	\$12,033,668	50.4%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$146,708,479	\$3,327,518	2.3%	\$3,327,518	\$8,331,627	\$18,267,266	\$173,307,372	15.3%	

T&F Used for Financial Aid	2025-26 (Planned)							Implied Discount Rate	Compliance with § 4-5.1.a.i
	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)		
Undergraduate, In-State	\$104,401,923	\$2,714,818	2.6%	\$2,714,818	\$172,221	\$15,832,575	\$120,406,719	13.3%	\$0 Compliant
Undergraduate, Out-of-State	\$18,215,368	\$478,066	2.6%	\$478,066	\$224,429	\$578,542	\$19,018,339	4.2%	
Graduate, In-State	\$24,102,479	\$93,780	0.4%	\$93,780	\$2,027,064	\$2,115,732	\$28,245,275	14.7%	
Graduate, Out-of-State	\$5,837,386	\$40,854	0.7%	\$40,854	\$5,895,417	\$23,980	\$11,756,763	50.3%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$152,557,156	\$3,327,518	2.2%	\$3,327,518	\$8,319,131	\$18,550,829	\$179,427,116	15.0%	

T&F Used for Financial Aid	2026-27 (Pro Forma)							Implied Discount Rate	Compliance with § 4-5.1.a.i
	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)		
Undergraduate, In-State	\$102,646,679	\$2,714,818	2.6%	\$2,714,818	\$169,326	\$15,566,422	\$118,382,627	13.3%	\$0 Compliant
Undergraduate, Out-of-State	\$17,621,777	\$478,066	2.7%	\$478,066	\$217,116	\$559,689	\$18,398,582	4.2%	
Graduate, In-State	\$24,160,261	\$93,780	0.4%	\$93,780	\$2,031,924	\$2,120,804	\$28,312,989	14.7%	
Graduate, Out-of-State	\$5,586,777	\$40,854	0.7%	\$40,854	\$5,642,317	\$22,951	\$11,252,045	50.3%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$150,015,694	\$3,327,518	2.2%	\$3,327,518	\$8,060,683	\$18,269,866	\$176,346,243	14.9%	

T&F Used for Financial Aid	2027-28 (Pro Forma)							Implied Discount Rate	Compliance with § 4-5.1.a.i
	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)		
Undergraduate, In-State	\$100,891,835	\$2,714,818	2.7%	\$2,714,818	\$166,431	\$15,300,270	\$116,358,536	13.3%	\$0 Compliant
Undergraduate, Out-of-State	\$17,028,186	\$478,066	2.8%	\$478,066	\$209,802	\$540,836	\$17,778,824	4.2%	
Graduate, In-State	\$24,191,495	\$93,780	0.4%	\$93,780	\$2,034,551	\$2,123,546	\$28,349,592	14.7%	
Graduate, Out-of-State	\$5,336,168	\$40,854	0.8%	\$40,854	\$5,389,217	\$21,921	\$10,747,306	50.3%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$147,447,684	\$3,327,518	2.3%	\$3,327,518	\$7,800,001	\$17,986,573	\$173,234,258	14.9%	

T&F Used for Financial Aid	2028-29 (Pro Forma)							Implied Discount Rate	Compliance with § 4-5.1.a.i
	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)		
Undergraduate, In-State	\$99,136,791	\$2,714,818	2.7%	\$2,714,818	\$163,536	\$15,034,117	\$114,334,444	13.3%	
Undergraduate, Out-of-State	\$16,434,595	\$478,066	2.9%	\$478,066	\$202,489	\$521,983	\$17,159,067	4.2%	
Graduate, In-State	\$24,409,833	\$93,780	0.4%	\$93,780	\$2,052,913	\$2,142,712	\$28,605,458	14.7%	
Graduate, Out-of-State	\$5,085,560	\$40,854	0.8%	\$40,854	\$5,136,117	\$20,892	\$10,242,569	50.3%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$145,066,779	\$3,327,518	2.3%	\$3,327,518	\$7,555,055	\$17,719,704	\$170,341,538	14.8%	

T&F Used for Financial Aid	2029-30 (Pro Forma)							Implied Discount Rate	Compliance with § 4-5.1.a.i
	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)		
Undergraduate, In-State	\$99,136,791	\$2,714,818	2.7%	\$2,714,818	\$163,536	\$15,034,117	\$114,334,444	13.3%	
Undergraduate, Out-of-State	\$16,434,595	\$478,066	2.9%	\$478,066	\$202,489	\$521,983	\$17,159,067	4.2%	
Graduate, In-State	\$24,409,833	\$93,780	0.4%	\$93,780	\$2,052,913	\$2,142,712	\$28,605,458	14.7%	
Graduate, Out-of-State	\$5,085,560	\$40,854	0.8%	\$40,854	\$5,136,117	\$20,892	\$10,242,569	50.3%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$145,066,779	\$3,327,518	2.3%	\$3,327,518	\$7,555,055	\$17,719,704	\$170,341,538	14.8%	

* 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
Old Dominion University

Institutions: 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.

Please estimate total E&G expenditures for 2022-23 and 2023-24

Total Estimated 2022-23 E&G Expenditures	\$354,413,589
Total Estimated 2023-24 E&G Expenditures	\$351,071,845

2024-2025

(Auto-calculated)	
Implied GF share	\$1

2025-2026

(Auto-calculated)	
Implied GF share	\$1

Short Title	2024-2025				2025-2026				2026-2027	2027-2028	2028-2029	2029-2030	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.
	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)	
Salary & benefit increases for existing employees													
Increase T&R Faculty Salaries	\$2,108,411	\$0	\$921,376	\$1,187,036	\$4,258,991	\$0	\$1,861,179	\$2,397,812	\$6,452,582	\$8,690,045	\$10,972,257	\$13,300,113	Pro forma assumes 2% increase in each year
Increase Admin. Faculty Salaries	\$1,271,247	\$0	\$555,535	\$715,712	\$2,567,500	\$0	\$1,122,181	\$1,445,319	\$3,890,526	\$5,239,084	\$6,615,623	\$8,019,183	Pro forma assumes 2% increase in each year
Increase Classified Staff Salaries	\$1,342,585	\$0	\$568,709	\$775,876	\$2,712,021	\$0	\$1,185,153	\$1,526,868	\$4,108,846	\$5,533,008	\$6,986,865	\$8,469,186	Pro forma assumes 2% increase in each year
Increase GTA Salaries	\$175,466	\$0	\$76,679	\$98,787	\$354,441	\$0	\$154,891	\$199,550	\$536,996	\$723,202	\$913,131	\$1,106,860	Pro forma assumes 2% increase in each year
Increase Adjunct Faculty Salaries	\$247,588	\$0	\$108,196	\$139,392	\$500,127	\$0	\$218,556	\$281,572	\$757,717	\$1,020,459	\$1,288,456	\$1,561,813	Pro forma assumes 2% increase in each year
3% annual state health insurance cost	\$524,256	\$0	\$229,100	\$295,156	\$1,064,240	\$0	\$465,073	\$599,167	\$1,620,424	\$2,193,293	\$2,783,348	\$3,391,105	Pro forma assumes 3% increase in each year
Inflationary non-personnel cost increases													
5.36% annual VITA charge increase	\$14,379	\$6,284	\$0	\$8,095	\$29,528	\$12,904	\$0	\$16,624	\$45,490	\$62,307	\$80,026	\$98,694	Pro forma assumes 5.36% increase in each year
Utilities, contracts, and leases	\$1,843,385	\$500,000	\$1,343,385		\$3,742,073	\$500,000	\$3,242,073		\$5,697,721	\$7,712,039	\$9,786,796	\$11,923,776	Assumes 3% increase in each year
New/expanded academic programs													
Establish the Eastern Virginia Health Sciences Center	\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0	\$0	Provide support for EVHSC academic programs to bolster enrollment, address health disparities in the Hampton Roads Region, and enhance faculty collaboration and research opportunities.
Grow ODU as a Data Science Hub to Serve Student and Industry Demand in Hampton Roads	\$1,130,182	\$361,314	\$777,868		\$1,850,000	\$361,314	\$1,488,686		\$1,850,000	\$1,850,000	\$1,850,000	\$1,850,000	Leverage the newly created School of Data Science to educate and graduate students into high-demand career opportunities in the region and provide a highly-skilled workforce to attract future industry investment.
Other academic & student support strategies & initiatives													
Promote Academic Innovation and High-Impact Experiences through Experiential Learning	\$277,098	\$87,887	\$189,211		\$450,000	\$87,887	\$362,113		\$450,000	\$450,000	\$450,000	\$450,000	Build out the Monarch Internship and Co-Op office in order to provide work-based learning and internship opportunities for every graduating student, and develop infrastructure to expand research opportunities for interested students.
Other non-academic strategies & initiatives													
Expand Economic Impact Through Research Expansion	\$1,113,818	\$353,269	\$760,549		\$1,808,810	\$353,269	\$1,455,541		\$1,808,810	\$1,808,810	\$1,808,810	\$1,808,810	Capitalize on RT status to increase external research investment, targeting emerging research areas. Develop infrastructure to support faculty and incorporate arts and humanities into scholarship in sciences, engineering, and other fields.
Maximize Student Access, Affordability, and Degree Completion	\$1,492,886	\$473,498	\$1,019,388		\$2,424,405	\$473,498	\$1,950,907						Provide alternative pathways to degrees by growing fully-online enrollment. Invest in tutoring, career services, and support services to promote retention and on-time degree completion. Engage in a comprehensive review of the university's cost model to ensure cost-efficiency.
Total Additional Funding Need	\$11,650,301	\$1,782,261	\$6,647,997	\$3,206,053	\$21,742,647	\$1,788,671	\$13,696,363	\$6,467,332	\$27,218,112	\$35,293,347	\$43,635,302	\$51,979,636	

Must not be greater than Incremental Tuition Rev in Part 2	
2024-2025	2025-2026
\$0.00	\$0.00
If result is < \$0, please provide explanation in these fields.	

Part 4b General Fund Share in FY2022

Institution	GF Share FY2022
Christopher Newport University	60.5%
George Mason University	49.7%
James Madison University	51.4%
Longwood University	60.3%
Norfolk State University	48.2%
Old Dominion University	56.3%
Radford University	59.0%
University of Mary Washington	59.4%
University of Virginia	31.3%
University of Virginia at Wise	56.9%
Virginia Commonwealth University	50.4%
Virginia Military Institute	42.1%
Virginia State University	47.1%
Virginia Tech	38.2%
William & Mary	38.2%
Richard Bland College	62.0%
Virginia Community College Sys	62.8%
Total, All Institutions	48.2%

Source: SCHEV 2022 Base Adequacy Calculation.

Part 5: Six-year Pro Forma Calculations: 2022-23 through 2029-30
Old Dominion 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	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.	From FY23-FY30					
	Total E&G GF Revenue (includes tab 4, not tab 6)	178,801,060	185,637,784	4%		188,837,837	2%		192,105,116	2%		195,441,068	2%		198,847,171	2%		202,324,939	2%		205,875,920	2%		Total Chg.	Avg Annual Chg.				
Tuition discount rate	16.9%	15.4%	-1.50ppt	15.3%	-0.08ppt	15.0%	-0.37ppt	14.9%	-0.04ppt	14.9%	-0.04ppt	14.9%	-0.04ppt	14.9%	-0.04ppt	14.9%	-0.04ppt	14.9%	-0.04ppt	14.9%	-0.04ppt	14.9%	-0.04ppt	14.9%	-0.04ppt	-2.09ppt	%		
Total E&G NGF Revenue	155,788,918	161,934,981	4%	168,502,058	4%	175,440,414	4%	174,043,115	-1%	171,255,937	-2%	171,255,937	-2%	170,265,571	-1%	170,265,571	0%	170,265,571	0%	170,265,571	0%	170,265,571	0%	170,265,571	0%	170,265,571	0%	9%	
Incremental E&G NGF Revenue vs. prior yr	6,145,143	6,145,143	0%	6,567,997	7%	6,938,358	6%	(1,397,259)	-120%	(2,787,178)	-99%	(2,787,178)	-99%	(960,368)	-66%	(960,368)	-66%	(960,368)	-66%	(960,368)	-66%	(960,368)	-66%	(960,368)	-66%	(960,368)	-66%	-100%	
Total E&G Revenue	334,589,978	347,871,845	4%	357,339,895	3%	367,545,530	3%	369,484,183	1%	370,103,168	0%	370,103,168	0%	372,620,510	1%	372,620,510	1%	372,620,510	1%	372,620,510	1%	372,620,510	1%	372,620,510	1%	372,620,510	1%	0%	
Implied GF % of E&G	53.4%	53.4%	0ppt	52.8%	-0.6ppt	52.3%	-0.6ppt	52.9%	0.6ppt	52.9%	0.6ppt	52.9%	0.6ppt	53.7%	0.8ppt	53.7%	0.8ppt	54.3%	0.6ppt	54.7%	0.4ppt	54.7%	0.4ppt	54.7%	0.4ppt	1.3ppt	%		
Total E&G Expenditures	354,413,989	351,071,845	-1%	360,839,885	3%	371,045,531	3%	378,502,089	1%	384,566,321	2%	384,566,321	2%	382,818,278	2%	382,818,278	2%	382,818,278	2%	382,818,278	2%	382,818,278	2%	382,818,278	2%	382,818,278	2%	13%	
Incremental E&G Expenditures vs. 2023-24	11,550,301	11,550,301	0%	11,550,301	0%	11,550,301	0%	11,550,301	0%	11,550,301	0%	11,550,301	0%	11,550,301	0%	11,550,301	0%	11,550,301	0%	11,550,301	0%	11,550,301	0%	11,550,301	0%	11,550,301	0%	350%	
Reallocation of existing dollars (ftaf after 2025-26)	1,782,251	1,782,251	0%	1,782,251	0%	1,782,251	0%	1,782,251	0%	1,782,251	0%	1,782,251	0%	1,782,251	0%	1,782,251	0%	1,782,251	0%	1,782,251	0%	1,782,251	0%	1,782,251	0%	1,782,251	0%	100%	
Pro Forma Surplus/Deficit	(19,824,011)	(3,500,000)	-82%	(3,500,000)	0%	(3,500,000)	0%	(3,500,000)	0%	(3,500,000)	0%	(3,500,000)	0%	(3,500,000)	0%	(3,500,000)	0%	(3,500,000)	0%	(3,500,000)	0%	(3,500,000)	0%	(3,500,000)	0%	(3,500,000)	0%	617%	
Incremental Surplus/Deficit	(19,824,011)	16,324,011	-182%	16,324,011	-100%	16,324,011	-100%	16,324,011	-100%	16,324,011	-100%	16,324,011	-100%	16,324,011	-100%	16,324,011	-100%	16,324,011	-100%	16,324,011	-100%	16,324,011	-100%	16,324,011	-100%	16,324,011	-100%	16,324,011	-100%

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	53.4%	53.4%	0ppt	53.4%	0ppt	53.4%	0ppt	53.4%	0ppt	53.4%	0ppt	53.4%	0ppt	53.4%	0ppt	53.4%	0ppt
Implied Incremental T&F Increase (%)	5.9%	-4.7%	-10.6ppt	0.0%	4.7ppt	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Implied Incremental GF Increase (%)	5.9%	-4.7%	-10.6ppt	0.0%	4.7ppt	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Blended Scenario Calculator - Share of Deficit Covered by Each Source (Must add up to 100%)		Expenditure reductions		T&F increases		GF increases		TOTAL	
		0%	0%	0%	0%	0%	0%	0%	0%
Input percentages here		0%	0%	0%	0%	0%	0%	0%	0%
TOTAL		0%	0%	0%	0%	0%	0%	0%	0%

	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 (%)	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%
Implied incremental T&F increase (%)	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%
Implied incremental GF increase (%)	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%
Implied GF % of E&G	53.4%	53.4%	0ppt	52.8%	-0.6ppt	52.3%	-0.6ppt	52.9%	0.6ppt	52.9%	0.6ppt	53.7%	0.8ppt	54.3%	0.6ppt	54.7%	0.4ppt

2023 SIX-YEAR PLAN NARRATIVE (Part II)

INSTITUTION: Old Dominion 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.

Old Dominion University (ODU) is a very high research activity public research university located in Coastal Virginia. Our world-class faculty fosters dynamic on-campus and global online learning for undergraduate and graduate students that enriches their lives, promotes insightful and perceptive leadership, and motivates the pursuit of excellence in dedicated fields and professions. We collaborate with strategic partners to address challenges and propose solutions that impact the economy, environment, health and wellness, and social justice. In pursuit of equity and inclusion, ODU provides opportunities for educational, artistic, and professional growth to our diverse Monarch community.

Our core values are accessibility, collaboration, global engagement, inclusion, innovation, and respect.

Our vision for the future is to be a forward-focused public research university that is both innovative and entrepreneurial in propelling Old Dominion University to national and international prominence.

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?

Old Dominion University's strengths and areas of distinctiveness include its success in graduating STEM-H students, long history of distance/online education, emphasis on leveraging regional assets to produce internationally recognized programs and research, and culture of innovation. Across all higher education institutions in Virginia, ODU graduates the second highest percentage of STEM-H graduates. Many of these degrees were earned through distance learning programs.

Additional areas of distinctiveness include -

- The pending integration with Eastern Virginia Medical School
- The creation of the School of Data Science

Opportunities for improvement include the following:

- Updating the institution's general education requirements in a way that reimagines instruction and employs more contemporary approaches to support student learning and better prepare students for the future.
- Increasing targeted hiring for specific academic, operational, research, and service needs and anticipated areas of institutional growth.
- Creating new revenue streams and attracting grants through new program initiatives, innovative campus facility use agreements, and local partnerships.
- Jump-starting research and industry opportunities by developing projects to generate mutually beneficial regional and global partnerships and collaborations.
- Increasing opportunities for paid experiential learning to engage students and benefit the community.

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.

- **Establish the Eastern Virginia Health Sciences Center**

Once completed, the merger will have several impacts on local students and the Hampton Roads community including –

- Strengthening the pipeline of medical education and associated degrees, which will aid in addressing healthcare access disparities in Hampton Roads.
- Facilitating greater research collaboration among faculty at ODU and EVMS, as well as medical students and graduate students.
- Attracting faculty who will provide an enhanced educational experience for undergraduate and graduate students.

- **Expand Economic Impact through research expansion**

Capitalizing on the University's recent R1 status, a focus on research infrastructure will drive external investment in the region, support local industry and increase local and state tax revenues, and serve to recruit and retain best-in-class faculty. Specific strategies include -

- Developing infrastructure to support faculty.
- Targeting emerging research areas.
- Incorporating scholarship in arts and humanities into sciences, engineering, and other fields.

- **Grow ODU as a Data Science Hub to serve student and industry demand in Hampton Roads**

Hampton Roads has an especially high demand for data science expertise, from national labs, finance, industry, health care providers, military centers, and maritime-related industries. To address the need for highly-compensated professionals in this field, the University is focused on –

- Leveraging a new school of data science to grow enrollment.
- Hiring faculty and support staff to respond to anticipated student and industry demand.
- Concentrate on interdisciplinary skills that graduates will need throughout their careers.

- **Maximize Student Access, Affordability, and Degree Completion**

The University is fully committed to continuing to serve its unique student population in the most cost-effective way possible. Ongoing and planned efforts in this area include -

- Providing affordable alternative pathways to degrees by growing fully online enrollment.
- Investing in tutoring, career services, and other support services to promote retention and on-time degree completion.
- Engaging in a comprehensive review of the University's cost model to ensure cost-effectiveness.

- **Promote Academic Innovation and High-Impact Experiences through Experiential Learning Opportunities**

The newly created Monarch Co-op and Internship office will serve to-

- Develop cross-campus partnerships and assess internship programming.
- Provide internship advising and coordinate internship placements.
- Build relationships with local industry to identify work-based learning opportunities.

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.

- ODU is committed to minimizing tuition increases and maintains the fourth-lowest tuition and E&G fees among public Virginia institutions.
- According to the most recent SCHEV Base Adequacy calculations, ODU was the only institution below the “base adequacy” benchmark.
- At the same time, growth in the VMSSDP program has increased the cost of foregone revenue from \$1.8M in FY18 to \$9.1M in FY23.
- Taken together, these factors limit ODU’s ability to make strategic investments. As demonstrated in Part 1, the 4.8% increase in tuition for FY24 is not sufficient to cover ongoing operations, and reallocations from mission-critical functions needed to cover salary and fringe increases, utility escalation, and strategic initiatives.
- State investment will allow ODU to make needed investments in academic, student success, and research strategies identified in Part 1.

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.

Enrollment projections are primarily based on the longitudinal data regarding various subsets of the records and their academic behavior over time. Specific factors impacting current projections include the following:

- An overall decline in undergraduate enrollment is attributed to strategic changes in application of the freshman class target size. It is also partially explained by the decline in retention and persistence rates, which are recovering incrementally. Another aspect of the phenomenon is the decline in student progression rates during the pandemic.
- The University is making deliberate efforts to increase fully online enrollment.
- Degree production shows a decline due to smaller upper level on-campus undergraduate enrollment. The negative impact of this decline is expected to be offset by the growth in online enrollment

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

ODU's enrollment projections incorporate a slight decline in the high school graduate population. To balance this decline, ODU's enrollment strategy includes investment in alternative delivery methods, growth of in-demand programs, and a shift in admissions policy to ensure institutional student support resources are used to maximize effect.

The University's future enrollment strategy includes the following actions -

- Growing fully online enrollment, focusing on developing degree programs that are in high demand for online instruction.
- Implementing a more deliberate admissions approach to reduce admittance of students who are unlikely to persist and graduate.
- Incorporating current EVMS enrollment and leveraging the merger to grow enrollment in the newly created Eastern Virginia Health Sciences Center.

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.

- Enrollment projections are based on longitudinal data for various subsets of records, however there is uncertainty regarding the return of trends to pre-pandemic levels.
- It is unknown how the shift in the distribution between campus-based and online enrollment will affect retention, persistence, progression, and completion.
- Future freshman classes will undergo greater selectivity with a goal of improving the likelihood of student success and preventing applicants from incurring costs for unfinished degrees. The total impact of this shift is unknown.
- The usual methods of enrollment projections are not able to account for the merger with EVMS and any immediate or future enrollment impact.

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).

- A modest decline in undergraduate enrollment due to greater selectivity will have a negative impact on revenue, however the class of students who would not be admitted are unlikely to persist to degree, so the tail of the effect is short.
- A focus on student success and retention will incur costs associated with counseling, advising, and coaching.
- Growth in high-demand online programs is expected to counterbalance the admission policy decision. Online growth will require institutional investment in faculty, support staff, and technology.

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).

ODU adopted the following graduation and retention goals in its 2023-2028 strategic plan:

- Increase graduation rate from 48% (2022) to 57% by 2028.
- Increase year one to year two retention rate from 74% (2022) to 82% in 2028.
- Realize 100% student participation in work-based learning opportunities prior to graduation by 2027.

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?

ODU is taking a number of steps to address persistence and completion goals, including-

- Increased tutoring, success coaching, and peer success services, with a specific focus on first- and second-year students and courses with especially high drop, fail, and withdraw rates.
- Establishing an Associate Registrar for Enrollment Services position to manage withdrawal and stop-out enrollment.
- Investment in support services for digital learning programs, including support for advising, student success for freshmen populations, and targeted support for special populations such as international and military students.

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.

Due to the critical nature of this work, ODU is dedicating existing and planned nongeneral funds to advancing student persistence and graduation. If state support is provided for operations per the general fund requests in Part 1, it will allow the institution to develop the office and meet its goals with minimal additional tuition funds needed, thereby reducing the need for planned tuition increases.

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.

- ODU administers the First Destination Survey (FDS) to graduates 3, 6, and 12 months after their graduation.
- The FDS records employment or continuing education status, occupation, industry, compensation, location, degree-relevancy, and internship experience (including whether an internship led to employment).
- The FDS illustrates the University's success in placing students into high-demand fields and occupations, including information technology, education, and health, pharmaceuticals, and biotech.
- The FDS highlights the importance of internship opportunities and pathways – in the most recent survey, 51.4% of respondents reported that their internship experience(s) led to employment opportunities.
- The Fall 2022 FDS is attached.

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?

- In response to feedback from several focus groups with the local business community, ODU has created the Monarch Co-op and Internship Office to support the goal of every graduate completing an internship by 2027.

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.

Due to the critical nature of this work, ODU is dedicating existing and planned nongeneral funds to growing the Monarch Co-op and Internship Office. If state funding support is provided for operations per the general fund requests in Part 1, it will allow the institution to develop this office and meet its goals with minimal additional tuition funds needed, thereby reducing the need for planned tuition increases.

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?

ODU is best positioned to supply talent in the following areas:

- Engineering and technology
- Health Professions
- Education
- Business Analytics
- Computer Science
- Cybersecurity
- Data Science
- Supply chain, logistics, and maritime operations

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.

ODU has engaged in five different strategies to align programs with workforce needs-

- Expansion of its focus on online learning through the development of the Division of Digital Learning.
- Collaboration with advisory boards to review and suggest changes to course syllabi and materials.
- Creation of the Office of the Associate Vice President for Corporate Relations, focused on developing and providing programming of specific need to businesses.
- Creation of the Monarch Co-op and Internship Office, with the goal of every graduate completing an internship by 2027.
- Development of two lab school proposals, focused on maritime and computer science.

The University has identified four undergraduate and six graduate programs for growth.

- Undergraduate programs include cybersecurity, computer science, nursing, and leadership (which serves as its degree completion program).
- Graduate programs include master's degree programs in cybersecurity, computer science, library science, public administration and doctoral degree programs in community college leadership and English.

The University continues to monitor low-enrolled programs, and is in the process of closing four programs:

- Modeling and Simulation (BS)
- Economics (BA)
- Occupational and Technical Studies (MS)
- Applied Sociology (MS)

At this point, the following are planned for closure:

- Graduate certificate in Arts & Entrepreneurship
- Graduate certificate in Health & Humanities
- Graduate certificate in Social Justice & Entrepreneurship
- Undergraduate major in Parks and Recreation Management
- Master's in Early Childhood Education

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.

ODU intends to maintain its status as one of the lowest-cost institutions in Virginia. Specific strategies include –

- Undergoing a comprehensive external review of the University’s cost model and examining a move from per-credit hour tuition to flat rate for full time, to incentivize students taking more credits per semester and reducing time to degree.
- Investing in and growing targeted online program offerings, to provide an alternative pathway for students seeking degrees in high-demand fields but who are not able to complete an on-campus degree, or who would be able to complete an online degree more quickly.

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?

The included 6% increases are based on the following:

- Consideration of cost increases related to salary and benefit increases and inflationary escalators in nonpersonal services.
- Analysis of the higher education market in Virginia, wherein ODU remains the fourth lowest-cost institution (accounting for tuition and all mandatory fees), and the lowest-cost doctoral institution.
- Accounting for the impact of state investment in financial aid to reduce the net price for students.

Strategies for institutional aid and discounts/ waivers include -

- A reduction of tuition used for financial aid from \$8.3M in FY23 to \$3.3M in FY24, to keep more resources in E&G operations.
- A targeted approach of institutional merit aid focused on attracting high-performing students.
- Accounting for the rapid growth in VMSSDP waivers in recent years.

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?

The pricing / discounting approach is expected to have the following impacts:

- Increased enrollment of high-performing high school students due to focused merit awards.
- Decreased net tuition due to VMSSDP waivers.
- Possible increase in students taking fifteen or more credit hours, pending results of the external cost model review and potential move to a flat rate tuition.

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.

The most significant driver of costs is salary and benefit increases.

- Between 2019 and 2022 the number of employees per student FTE decreased by 0.5%, but salary outlay increased by 3.4% (ODU Fact pack "Personnel #s and Costs Chart (C)")
- Salary increases of 5% in each year of the 2022-24 biennium have required an additional \$13M over FY22 amounts.

Other significant increases include the following:

- Waivers provided under the VMSSDP program have grown 400% between FY18 and FY23
- Utilities have increased 48% (\$7M) between FY18 and FY23
- Software maintenance has increased 101% (\$6M) between FY18 and FY23

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.

Short Term Strategies

- The University has prioritized reallocations to reduce tuition increases. The Board-approved budget for FY24 includes \$4.76 million in reallocation within Education & General programs.
- Further development of online education options will enhance the University's ability to offer cost-effective education.

Long Term Strategies

- The University is undergoing a full-scale external review of its cost model, to include options for tuition restructuring.
- Low-enrollment programs are monitored for potential closure where appropriate.

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?

1. Construct Engineering & Arts Building

The Arts & Engineering Building will address an array of significant existing programmatic and building deficiencies across several academic colleges, while expanding the University's ability to prepare students for the challenges of today's society and changing workplace. The approximately 135,000-square-foot building will include state-of-the-art instruction, laboratory, studio, computer, and collaborative spaces that integrate the arts and the sciences and facilitate dynamic ways of teaching and research, along with office and other academic support functions. Specialty spaces will include an approximately 800-seat theatre with 50-seat orchestra pit and support spaces, instructional spaces, health science clinical lab spaces, engineering high bay space, visual arts studio spaces, and music and dance studio spaces. Construction of this facility will further the University's goal of incorporating arts and humanities scholarship into science and engineering scholarship and instruction.

2. Construct School of Data Science

The School of Data Science will include a technology-rich environment and include collaborative labs, classrooms, experiential learning spaces, research labs, and faculty/administration offices to support growth in data science, computing, and engineering. The building will expand the inventory of collaborative laboratories and learning spaces at the institution. Electrical and computer engineering, programs that have been constrained for years by limited and outdated laboratories and learning spaces, will be housed in the new building. The collaborative spaces will provide a setting where faculty and students from disciplines such as data science, mathematics, computing, engineering, cyber security, and manufacturing can work together to explore and apply data science strategies to a wide range of real-world problems as they relate to STEM-H professions. Bringing together these disciplines within a collaborative data science space that provides students the opportunity to learn about manufacturing, technology, and innovation will better prepare future graduates for multi-dimensional careers in computing, technology, and engineering.

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.

ODU has two general fund budget requests:

1. Provide support to address base funding disparity. \$11,400,000 in each year.

The requested amount will make progress towards bringing the institution in line with other public institutions, and will allow for investment in targeted academic, research, and student success initiatives while mitigating need for tuition increases.

2. Provide funding to offset VMSPD waivers. \$9,114,010 in each year

As an institution that serves a large military population, growth in the VMSPD program has put a rapidly growing strain on institutional resources (\$1.79M in FY18 to \$9.11M in FY23). The waivers are currently offset entirely by tuition revenue, as no general fund is provided.

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

ODU contributes nearly \$2 billion to the regional economy each year. Details can be found on the University Impact site: [University Impact - Old Dominion University \(odu.edu\)](https://www.odu.edu/impact)

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.

- University Policy Number 1011, last revised April 22, 2022, is available here: [1011: Freedom of Expression - Old Dominion University \(odu.edu\)](#)
- The University's Freedom of Expression Team meets at least once a semester to inform the University's response to incidents, and affords students ways to affirm their rights when their constitutionally protected speech is disrupted, including an online contact form students can use to report concerns or issues. The Freedom of Expression Team website is here: [Freedom of Expression Team - Old Dominion University \(odu.edu\)](#)

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.

- ODU is in the process of finalizing a merger with Eastern Virginia Medical School to create the Eastern Virginia Health Sciences Center.
- ODU is opening the Virginia Beach Institute of Data Science in October 2023. The site will include classrooms for data science offerings, research labs, faculty offices, and the Coastal Virginia Center of Cyber Innovation. A proposal to offer a Bachelor of Science in Data Science has been submitted to SCHEV.

[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?

ODU's recent R1 designation better positions the institution to recruit nationally prominent faculty with strong funded research portfolios and attract top undergraduate and graduate students. R1 status also strengthens faculty and institutional research proposals to federal agencies and other sponsors and has thus-far yielded a 20% growth in externally funded research expenditures over the metric that won R1 designation in 2021.

Specific areas in which ODU has recently invested internal funds include—

- Maritime - ODU provides leadership in securing federal funding support for designing workforce training pipelines for digital transformations in shipbuilding and repair, offshore wind energy, and multi-modal transportation, while also innovating uses of autonomous vehicles in sea/aerial environments.
- Data science and cybersecurity - ODU researchers are funded by agencies such as the Department of Defense and Department of Energy to apply artificial intelligence methods to Navy mission engineering challenges and offshore wind energy facilities (among other application areas), while also collaborating with regional businesses through innovation hubs in Newport News, Suffolk, Portsmouth, Hampton, and Virginia Beach.
- Coastal resilience - ODU researchers work closely with localities and state agencies to develop science-based, long-term plans for adaptation to climate change, demonstrating the efficacy of innovating local models to meet global resilience challenges.
- Population health - ODU researchers are collaborating closely with community-based organizations and Jefferson Lab data scientists to apply cutting-edge computational and Artificial Intelligence (AI) methods in a community-engaged way to reduce health disparities and inequities in Hampton Roads.

Over the next six years, ODU intends to grow capacity in AI – fostering partnership between the new school of data science and Jefferson Lab's new data science initiative. This combination would be among the strongest academic-federal AI research and training partnerships in the US. Funding for additional ODU faculty with AI expertise and a mandate to collaborate with federal and private sector partners would position Hampton Roads to attract startups and existing companies interested in an AI-trained workforce and AI-focused innovation to the region.

[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?

ODU is engaged in a collaborative effort with James Madison University (JMU) and Longwood aimed at helping professionals currently working in non-teacher roles in schools to obtain training to meet licensure eligibility, and to begin teaching immediately upon entering the program. JMU has piloted the program, in which participants complete fully online, non-credit teacher preparation coursework while also teaching during the day. At the end of the coursework, students will be eligible for full licensure. ODU is well-positioned to partner in this effort due to the institution's online capacity.

[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.

Permitting Higher Education Equipment Trust Fund allocations to be used for cloud-based software would enhance ODU's ability to keep pace with technology needs of faculty and students. Cloud-based software has become an integral part of academic needs and is not currently eligible for the Higher Education Equipment Trust Fund.

[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.

N/A

Old Dominion University
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Q1: Can you provide additional details on the causes of the class of 2018 not persisting?

The entering class of 2018 had a retention rate (80%) in line with historical averages at ODU. The change in admissions practice - to reduce admission of students unlikely to succeed - was done not in response to a particular year, but rather as a result of the administration taking a new approach to student success and institutional retention and graduation rate.

Q2: What specific strategies is ODU employing to improve retention and graduation rates, beyond admissions policies? Please refer to data you collect on retention drivers (e.g., financial versus academic causes).

Old Dominion University employs strategies directed toward improving retention and graduation rates. Below is a sampling of specific retention strategies to assist students in persisting throughout their academic endeavors.

- The Center for Major Exploration & Mane Connect Success Coaching provides academic advising and success coaching, targeting students who have not declared a major and/or possess potential risks associated with being successfully retained, such as being a first-generation student and/or Pell eligible. A Retention Coordinator leads these efforts by coordinating retention initiatives, such as calling campaigns, push notifications, and registration hold monitoring/resolution.
- The Student Success Innovation Team provides for coordination of retention planning and interaction between team members in Academic Affairs and Student Engagement & Enrollment Services. The team is engaging with the National Institute for Student Success to conduct a comprehensive review of campus student success initiatives.
- In Financial Aid, need and merit-based financial aid leveraging analysis is conducted to optimize funding and retention/persistence of students.
- Career Development Services coordinates student on-campus employment to support financial and engagement needs that are critical to retention.
- Educational Accessibility provides direct services, such as specialized testing, sign language services, and temporary transportation to students with registered disabilities.
- The Monarch Experience represents a series of programs offered during the first month of the fall semester to provide a deep dive into the content introduced at Orientation, familiarize new students (and families) with campus geography and resources, introduce core components of ODU social culture and norms, and create multiple modes of engagement to allow students to connect with faculty, staff, and peers.

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- Student Outreach Services, which is embedded in the Dean of Students Office, provides direct support to students who experience administrative, academic, or personal roadblocks, while working collaboratively with ODU's Care Team to assist in achieving both academic and personal goals.
- The Care Team is a campus-wide team consisting of staff from Counseling Services, Educational Accessibility, ODU Police Department, University Chaplains, and Student Health Services, among others. This group provides a single point of contact to report and resolve student-related issues.
- The Military Connection Center assists veteran and active-duty students in navigating the college experience.
- The Veteran Student Success Coach is supported by a Centers of Excellence for Veteran Student Success grant. The coach, along with a graduate assistant, serves military-affiliated students (active military, veterans, and dependents) and provides military-related programming in order to support retention.
- The Male Achievement Initiative is supported by a SCHEV grant. the initiative provides male students (including Pell eligible men), who historically retain and graduate at lower rates than females, with help in understanding the foundational principles of financial literacy and the intersection of financial health and student success, academic skill development, and support through multichannel engagement activities that also assist with sense of belonging/connectedness.
- Family Weekend provides a platform to educate families on campus resources, highlight unique programs, and aid parents/families in transition.
- The Monarch Pantry assists students with food insecurity.
- Off-Campus Services provide resources and support for students living off campus, along with representation in local civic leagues.

In addition to the resources/initiatives noted above, in partnership with Ruffalo Noel Levitz, predictive analytic modeling has revealed data related to retention drivers. The Student Retention Predictor (SRP) model contains twenty-three variables, each having a role in determining a student's retention score. Below are a few of the drivers that are closely related to retention and graduation of Old Dominion University students.

- High school GPA is the strongest predictor of success, which is related to academic preparation and is being addressed by the success coaching team (and others across campus) who work with students to establish academic plans and provide associated academic support resources.
- Financial Aid Gap is associated with unmet need and is considered in strategic financial aid modeling/planning, along with financial literacy education for both students and families.

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- Number of Days Admitted is associated with educational aspiration indicating that the sooner one applies for admission and is admitted, the more motivated they are to attend a higher educational institution, and Old Dominion University in particular. And, the reverse (fewer days admitted) is associated with retention risk and is addressed through success coaching and engagement efforts.
- Distance From Campus is related to a student's permanent address and associated with a need for social integration and sense of belonging. Both are addressed through several initiatives targeting these needs.

Each student may possess one or more of these risk factors, and each factor lends itself to a mitigation intervention. Many of these retention drivers are central to the retention mitigation initiatives/strategies described above.

Q3: How can UG/FTIC enrollment projections be relatively flat with ~400 annual decrease in freshman class?

The decline of 418 records is associated with the subset of lower-level undergraduate non-distance enrollment from 6,285 in Fall 2022 to 6,703 in Fall 2023. Old Dominion University anticipates being able to offset this decrease in student headcount through strategic growth in distance education. Specifically, ODU projects an increase of 202 students in the lower baccalaureate distance headcount from Fall 2022 to Fall 2023, going from 1,099 in Fall 2022 to 1,301 in Fall 2023. As a result, the total lower-level baccalaureate enrollment for the institution is projected to decline by 216 students. Similarly, ODU projects a decline in upper-level non-distance headcount and a shift in the distribution of records by modality toward fully online. As a result, the decline in upper-level undergraduate enrollment is projected to be 144 for the entire institution.

Q4: How can ODU better tie program decisions (including launching and sunseting programs) to labor market data and ensure decisions are made in a data-driven way?

Between October 2020 and July 2022, the Division of Academic Affairs led the Program Prioritization Initiative (PPI), which resulted in recommendations for investment, reductions, and program closures. ODU has identified four undergraduate and six graduate programs for growth. These programs have clear connections with the state's workforce needs. The undergraduate programs that have been identified include cybersecurity, computer science, gaming studies, human services, nursing, and leadership, which serves as a degree completion program). The graduate programs include master's degree programs in cybersecurity, computer science, library science, and public administration, as well as doctoral degree programs in community college leadership and English. All these programs, and hence most of the planned growth, will occur through online programs.

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Table 1 New Program Rubric.

			Comments	
Relates to Mission of ODU	Yes	No		
Relates to Vision of ODU	Yes	No		
Relates to Strategic Plan of ODU	Yes	No		
Relates to Research Priority of ODU	Yes	No		
Responsive to Community (external)	Yes	No		
Addresses Future Enrollment Changes	Yes	No		
Incentivized by State	Yes	No		
Demonstrated Rationale/Need for Degree	Yes	No		
Demonstrated BLS Demand	Above average	As Fast Average	Below Average	
Potential for Enrollment Growth	High	Medium	Low	
Amount of Resources Needed	Significant	Some	None	

As part of the PPI, the institution also developed a framework for determining which new programs should be created. It was determined that new programs should go through a pre-review process prior to investing time into developing a full program proposal. The initial step of the process is the completion of a new program rubric (see Table 1). The rubric allows the assignment of internal resources to program development appropriately.

As an illustration of the way that the rubric is used, the table below shows new programs under consideration. ODU's long history as a leading institution for STEM-H programs makes it the right place for many of these degrees. More importantly, with the faculty and research depth in these areas, several of the programs can be developed with minimal investment. Because the University is not able to create a large number of new programs, the rubric will help determine which are the most viable and responsive to the needs of the Commonwealth of Virginia.

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Table 2. Programs Under Consideration at ODU

Bachelor's Degrees	Master's Degrees	Doctoral Degrees
Business Analytics Maritime and Supply Chain Management	Criminology and Public Policy Electrical and Computer Engineering Geospatial Analysis Human Services Leadership Master of Arts in Teaching <ul style="list-style-type: none"> • Teaching, Elementary Education, Middle and Secondary, and Teaching English as a Second Language Mechanical and Aerospace Engineering	Biology Communication and Media Studies Cybersecurity Data Science Electrical and Computer Engineering Mechanical and Aerospace Engineering Systems Engineering

In determining demand, ODU consults the [Bureau of Labor Statistics Occupational Outlook Handbook](#) and the [Virginia Employment Commission's Labor Market Information](#) database as a starting point. In addition, ODU continuously seeks feedback from regional business leaders and alumni to ensure our programs are up to date. These reviews and feedback show high regional demand for programs in business analytics, engineering, teaching, data science, human services/criminal justice, and cybersecurity.

Q4.a: Can you provide a list of recently closed academic programs and planned closure of programs?

Determinations about program closures are driven by enrollment data and program alignment with the University's mission. ODU closely monitors program enrollment in relation to the university's mission and has made decisions to close those programs that are low enrolled and are not directly connected to the University's mission. In 2020, the following four degree programs were closed:

- Modeling and Simulation (BS);
- Economics (BA);
- Occupational and Technical Studies (MS); and
- Applied Sociology (MS).

ODU has also closed or is in the process of closing the following graduate certificates:

- Arts and Entrepreneurship;
- Health and Humanities;
- Social Justice and Entrepreneurship;
- Military and Child Education;
- Modeling and Simulation - Oceanography;
- Grad Cert in Modeling and Simulation - Mathematics and Statistics;

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- Grad Cert in Modeling and Simulation - Education and Training;
- Modeling and Simulation - Computing and Informatics;
- Modeling and Simulation - Business and Public Administration;
- Modeling and Simulation - Biological Sciences;
- Healthcare Executive; and
- Nurse Executive.

Planned closures are underway for the MS in Early Childhood Education and the major in Park, Recreation, and Tourism Management. In addition, programs that did not meet SCHEV productivity standards in 2020 are being monitored closely. For those low-enrolled programs not connected to the University's mission, chairs and deans have been notified that those programs are in jeopardy of being closed if enrollments do not increase.

Q5: Please provide a breakdown of how the \$11 million GF requests would be used for targeted academic, research, and student success initiatives while mitigating need for tuition increases.

Primary uses of the funding will include the following.

1. Freeing up one-time resources for critical infrastructure support and maintenance by filling the longstanding hole in ODU's ongoing budget

ODU's base budget includes \$6,551,425 funded from one-time resources, which was increased to \$10,051,425 in FY24. While the additional \$7.4M received in Chapter 1, 2023 Special Session 1 will ameliorate the need for the additional \$3.5M in FY24, it is not sufficient to address the prior, longstanding hole. Relying on one-time resources for ongoing operations means ODU is not able to use one-time savings (most notably from turnover vacancy savings) to address one-time needs that arise in each year, including maintenance and upkeep of buildings to reduce the need for larger-scale maintenance and infrastructure projects.

Closing the ongoing \$6.5M gap will allow ODU to responsibly manage one-time resources, engage in more stable multi-year planning, and make cost-effective investments in infrastructure and maintenance.

2. Addressing faculty compensation and E&G support services

In FY23, ODU's expenditures on teaching and research faculty salaries were \$4,389 per FTE, compared to an average of \$5,535 across all Virginia public four-year institutions and an average of \$6,134 across the Virginia public R1 doctoral institutions. ODU had the second-lowest expenditures per FTE in this category across all public four-year institutions. The same pattern holds true for E&G expenses more generally, as ODU's FY23 E&G expenditures per FTE were \$18,852 per FTE, the third lowest among public four-year institutions and below the averages of \$23,057 and \$25,007 for all public four-year institutions and R1 doctoral institutions, respectively.

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While ODU prioritizes internal reallocations towards the institutional functions of instruction, student support and academic support, current operations limit the ability to reinforce these areas. ODU is proud to maintain the lowest per-FTE expenditures in institutional support (\$2,234 in FY23 compared to averages of \$3,706 and \$3,073 for all public four-year institutions and R1 doctoral institutions, respectively), but this leanness places a significant constraint on the ability to address critical issues of faculty compensation, as well as student and academic support, without new sources of funding.

3. Investing in wage positions to maintain competitiveness and support employee retention in front-line positions.

As other employers in Hampton Roads increase wages, often starting at a \$15 hourly minimum, ODU faces upward pressure in compensation for front-line and part-time employees who can earn higher wages elsewhere.

Q6: What is driving the significant increase in institutional/administrative expenditures in 2021 and 2022?

Elevated expenditures in FY21 and FY22 are largely explained by one-time COVID expenditures (PPE, testing supplies and equipment), suspending the recovery of full costs to E&G from auxiliary enterprises, and recorded expenditures to move HEERF funding to lost revenue accounts in auxiliary programs, including housing, parking, and athletics. These entries (in fund 03690 – Higher Education Emergency Relief Fund, Institutional Support) total \$14.2 million in FY21 and \$9 million in FY22, and do not represent actual expenditures in program 106.

Table 3 below demonstrates that compensation costs continue to rise as additional salary increases are enacted and ODU has not yet returned to pre-COVID auxiliary indirect cost recovery (IDC) practice, but other ongoing expenditures in FY22 were \$4 million over FY20 levels. Total ongoing expenses in FY22 were \$39.3 million, compared to \$36.3 million in FY19 and \$32.6 million in FY20. On a per-FTE basis, FY22 ongoing expenditures were \$2,082, compared to \$1,850 in FY19 and \$1,659 in FY20.

Table 3 - Changes in Select Categories over FY20

	FY21	FY22
Compensation	\$920,226	\$2,779,599
Auxiliary IDC (Foregone Amount)	\$4,042,585	\$1,094,092
COVID One-Time	\$4,362,280	\$1,753,066
Lost Revenue Entry	\$14,238,021	\$8,966,081
Other	\$6,824,496	\$4,089,824
Total	\$30,387,609	\$18,682,661

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Q7: Regarding costs, your per student overall expenditures 3.5% and institutional/administrative expenditures 8.2% have grown at average annual rates over inflation for the past ten years. Please explain the five largest drivers of these increases including specific data within each category, and what are you doing to control each cost curve while maintaining or improving outcomes?

Regarding total expenditures (E&G and auxiliary), per FTE expenditures grew from \$15,540 in FY12 to \$21,851 in FY22 – a difference of \$6,312 and an annual growth rate of 3.5%. During that timeframe, the average growth across Virginia public four-year institutions was \$9,047 per FTE (3.73% CAGR). The largest driver of this increase is employee compensation (salaries, wages, and benefits), which makes up 84.9% of the total increase (\$5,356). Over the ten-year timeframe, employee compensation has grown at a rate of 4.7%. Table 4 below shows a comparison of employee compensation between FY12 and FY22.

Table 4 - Changes in Compensation Expenditures, FY12-FY22

	Benefits	Salaries	Wages	Compensation Total
Expend Per FTE 2012	\$1,817	\$5,815	\$1,528	\$9,161
Expend Per FTE 2022	\$3,625	\$9,087	\$2,039	\$14,517
FY12 to FY22 Growth Per FTE	\$1,808	\$3,271	\$511	\$5,356
Annual Growth Rate	7.1%	4.6%	2.9%	4.7%
Share of total per FTE expend increase	29.73%	50.45%	4.68%	84.87%

Within salary expenditures, growth is split between non-instructional and instructional as shown in Table 5. Growth in non-instructional salaries has slightly out-paced instructional growth (4.6% CAGR vs 4.3% CAGR, respectively), while growth in positions per FTE is flat.

This dynamic illustrates the difficulty in hiring and retaining skilled staff in non-instructional positions (IT, business services, etc.), which is driving the increase in salaries in those areas, as opposed to administrative bloat due to significantly growing positions per FTE. ODU remains committed to limiting position growth in non-instructional roles while taking a deliberate approach to compensation that will enable the institution to compete for talent with its peer institutions and other employers.

ODU has engaged a third-party firm to conduct a compensation study and review for non-instructional positions. The firm is currently conducting a market analysis and is expected to deliver preliminary results in November 2023.

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Table 5- Changes in Salary Expenditures, FY12-FY22

	Non-instructional	Instructional
Expend Per FTE 2012	\$3,052	\$2,763
Expend Per FTE 2022	\$4,787	\$4,213
FY12 to FY22 Growth Per FTE	\$1,735	\$1,450
Annual Growth Rate	4.6%	4.3%
Share of Total Per FTE Expend Increase	27.48%	22.97%

ODU has also experience notable growth in the costs of contracted professional services (such as media, legal, personnel management, etc.), utility and service charges, general maintenance and repair, and technical services – specifically computer software services. Table 6 shows the increases in per-FTE costs associated with these categories. Growth in these categories is reflective of the increased costs in ongoing contracts across the various areas, as well as the rising cost of utilities. ODU continues to review contracts as they come to the end of the term to evaluate the cost-effectiveness of continuing to outsource services as opposed to taking them in-house.

Table 6 - Changes in Selected Expenditure Categories, FY12-FY22

	Professional Services	Maintenance & Repair	Utility & Service Charges	Technical Services
Expend Per FTE 2012	\$638	\$249	\$573	\$208
Expend Per FTE 2022	\$1,688	\$550	\$964	\$494
FY12 to FY22 Growth Per FTE	\$1,050	\$300	\$391	\$286
Annual Growth Rate	10.2%	8.2%	5.3%	9.0%
Share of Total Per FTE Expend Increase	16.64%	4.76%	6.20%	4.53%

To account for the growth in the areas identified above, ODU has been diligent in reducing or maintaining expenditures in other areas. Specifically, per-FTE expenditures in other areas were \$4,711 in FY12, reached a peak of \$5,394 in FY18, and then decreased to \$3,638 in FY22.

Focusing on expenditures in institutional support (Cardinal Program 106), per-FTE expenditures increased by \$1,392 between FY2012 and FY2022 – an annual growth rate of 7.5%, however this number is inflated by one-times items as identified in the answer to Q6. Removing those one-time items, expenditures per FTE grew from \$1,316 to \$2,083- a difference of \$767 and CAGR of 4.7%. During that timeframe, the average growth across Virginia public four-year institutions was \$1,587 per FTE (6.5% CAGR).

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Patterns in institutional support follow institutional expenditures more generally. Compensation makes up a substantial portion (\$573 per FTE, 4.2% 10-year CAGR). On a per-FTE basis, compensation makes up around 85% of all expenditures in program 106 in a typical year, so expenditures in this program will be particularly sensitive to compensation actions, including state-mandated salary increases.

Professional and technical services also both show notable increases between FY12 and FY22 - removing one-time expenditures, professional and technical services have increased by \$277 per FTE – an annual growth rate of 12.7%.

To balance these cost drivers, ODU has focused on limiting increases and finding savings in other areas – specifically in leases, supplies and equipment, and contractual services where possible.