

## INSTRUCTIONS FOR SUBMITTING 2025 INSTITUTIONAL SIX-YEAR PLAN

**Due Date: July 3, 2025**

**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 of the strategic plan and six-year plan at each public institution of higher education, and that SCHEV report annually on the Commonwealth's progress toward achieving these goals and targets to the Governor, General Assembly, institutions of higher education and the public.

### 2025 Six-Year Plan Format

The 2025 Six-Year Plan consists of a workbook and an accompanying narrative. The workbook has an Instructions page, Institution ID page and seven parts/worksheets: Enrollment, Undergraduate Tuition and Fee Increase Rates, Revenue, Financial Aid, Academic-Financial, General Fund (GF) Request, Capital, Academic Programs, and Pro Forma. **Note: Shaded cells contain formulas.** Instructions for the narrative are provided in a separate attachment.

The 2025 Six-Year Plans are due July 3, 2025. 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 recommended, revised institutional submissions are due no later than October 1 or immediately following an institution's Board of Visitors' meeting, if it is later than October 1.

## INSTRUCTIONS FOR SECTIONS

### 1. 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 2026-28 biennium. The tuition and fee charges for in-state undergraduate students should reflect the institution's estimate of reasonable and necessary charges to students based on the mission, market capacity and other factors with the assumption of no new state general fund support.

### 2. Revenue

For FY2025- FY2028: 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. In line 25, enter E&G GF revenues for the current biennium. The formulas will automatically hold that constant for the remaining years. Though the Enrollment/Degree Projections are being developed in a separate process, institutions are required to provide a summary of enrollment projections in the Revenue tab (tab 2). Enrollment projections should be used to create the requested revenue estimates.

For FY2029-FY2032: Provide a pro forma analysis of total tuition revenue in years 2028-2032 by holding T&F constant at the planned 2027-28 rate while incorporating your institution's submitted enrollment projections for each year through 2032. 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.

### 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 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.

### 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 Q), 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 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. 2025-26). Please update total cost formulas if necessary. A separate worksheet (Part 6) is provided for institutions to request additional GF support for 2026-28. 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 2024-25 and 2025-26 as baselines for Tab 6 Pro Forma.

For the 2026-28 bienium 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.

Please use the chart provided to your institution which uses the Department of Planning and Budget FY24 actuals on the impact of statewide salary and health insurance increase impacts to your institution. Funding amounts shall assume an annual 2% salary increase for each year from FY2027 to FY2032 for those employees eligible for the state-supported salary increases in the 2026-2028 biennium. Funding amounts shall also assume an annual 1% health insurance 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 state health insurance cost" and specify salary amount by employee type and associated fringe benefit costs, but do not put any dollar amount in Columns H and L.

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 strategies under each goal):

<p><b>5. Six-Year Pro Forma Calculations</b></p> <p>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&amp;F (price) and GF increases would theoretically need to occur each year in order to cover the deficit and maintain the 2024-25 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&amp;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.</p> <p>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.</p>
<p><b>6. General Fund (GF) Request</b></p> <p>Instructions: Indicate items for which you anticipate making a request for state general fund in the 2026-28 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 Tab 4 and place it in bold print to draw attention to its connection to Tab 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.</p> <p>Note: If your institution thinks you cannot afford the nongeneral fund share of a statewide 2% annual salary increase, you can submit a request for GF support with explanations and assumptions in this tab.</p>
<p><b>7. Capital Requests</b></p> <p>Instructions: Indicate E&amp;G capital projects for which you anticipate making a request for state general fund in the 2026-28 biennium to complete a project. Projects should include planning costs and then funding for construction. Describe in the Notes column the justification, alternatives explored, and how the projects align with enrollment growth and facility condition index. If the project has other fund sources, please indicate source.</p>
<p><b>8. Degree/Certificate Programs</b></p> <p>Instructions: In the table below indicate which degree and/or certificate programs the institution plans to establish, grow, and close in the upcoming 2026-28 biennium. SCHEV's new degree program approval process will require all new degree programs for the upcoming biennium to be included in the Six-Year Plan table below.</p> <p><b>Enrollment/Degree Projections:</b> Detailed six-year enrollment/degree projections are being collected through a separate process. These projections will be incorporated in the Six-Year Plan as part of the July and August institutional meetings with the Op Six.</p> <p><b>BOV Approval:</b> Final board approval of the Six-Year Plan should be done at the earliest possible fall meeting. HB 897 (2018) specified that initial plans do not get posted on the General Assembly's website and that final plans should be submitted to DLAS no later than December 1. However, we are requesting that institutions submit final plans with their responses to Op Six Comments on October 1 (or as soon after fall board meetings as possible) as has been done in the past. We post the responses and final plans for review by the Op Six for a period of time prior to posting to SCHEV's website.</p> <p><b>Accessibility:</b> All files need to be checked for accessibility prior to submitting them. Information on accessibility is provided at this link on SCHEV's website: <a href="http://schev.edu/index/accessibility/creating-accessible-content">http://schev.edu/index/accessibility/creating-accessible-content</a>. The first link, "How to Make Your MS Office Documents Accessible" can be used to learn how to check documents. Only errors, not warnings, must be addressed.</p>
<p><b>Contacts for Questions:</b></p> <p>General Questions - Grace Khattar (<a href="mailto:GraceKhattar@schev.edu">GraceKhattar@schev.edu</a>)</p> <p>Academic - Joe DeFilippo (<a href="mailto:joedefilippo@schev.edu">joedefilippo@schev.edu</a>)</p> <p>Finance - Yan Zheng (<a href="mailto:yanzheng@schev.edu">yanzheng@schev.edu</a>)</p> <p>Financial Aid - Lee Andes (<a href="mailto:leeandes@schev.edu">leeandes@schev.edu</a>)</p>

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

**Legislative Reference:**

**§ 23.1 - 306. Institutional Six-Year Plans.**

A. The governing board of each public institution of higher education shall (i) develop and adopt biennially and amend or affirm annually a six-year plan for the institution; (ii) submit such plan to the Council, the General Assembly, the Governor, and the Chairmen of the House Committee on Appropriations, the House Committee on Education, the Senate Committee on Education and Health, and the Senate Committee on Finance no later than July 1 of each odd-numbered year; and (iii) submit amendments to or an affirmation of that plan no later than July 1 of each even-numbered year or at any other time permitted by the Governor or General Assembly to the Council, the General Assembly, the Governor, and the Chairmen of the House Committee on Appropriations, the House Committee on Education, the Senate Committee on Education and Health, and the Senate Committee on Finance. Each such plan and amendment to or affirmation of such plan shall include a report of the institution's active contributions to efforts to stimulate the economic development of the Commonwealth, the area in which the institution is located, and, for those institutions subject to a management agreement set forth in Article 4 (§ 23.1-1004 et seq.) of Chapter 10, the areas that lag behind the Commonwealth in terms of income, employment, and other factors.

B. The Secretary of Finance, Secretary of Education, Director of the Department of Planning and Budget, Executive Director of the Council, Staff Director of the House Committee on Appropriations, and Staff Director of the Senate Committee on Finance, or their designees, shall review each institution's plan or amendments and provide comments to the institution on that plan by September 1 of the relevant year. Each institution shall respond to any such comments by October 1 of that year.

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

D. Each six-year plan shall (i) address the institution's academic, financial, and enrollment plans, including the number of Virginia and non-Virginia students, for the six-year period; (ii) indicate the planned use of any projected increase in general fund, tuition, or other nongeneral fund revenues; (iii) be based upon any assumptions provided by the Council, following consultation with the Department of Planning and Budget and the staffs of the House Committee on Appropriations and the Senate Committee on Finance, for funding relating to state general fund support pursuant to §§ 23.1-303, 23.1-304, and 23.1-305 and subdivision 9; (iv) be aligned with the institution's six-year enrollment projections; and (v) include:

1. Financial planning reflecting the institution's anticipated level of general fund, tuition, and other nongeneral fund support for each year of the next biennium;
2. The institution's anticipated annual tuition and educational and general fee charges required by (i) degree level and (ii) domiciliary status, as provided in § 23.1-307;
3. Plans for providing financial aid to help mitigate the impact of tuition and fee increases on low-income and middle-income students and their families as described in subdivision 9, including the projected mix of grants and loans;
4. Degree conferral targets for undergraduate Virginia students;
5. Plans for optimal year-round use of the institution's facilities and instructional resources;
6. Plans for the development of an instructional resource-sharing program with other public institutions of higher education and private institutions of higher education;
7. Plans with regard to any other incentives set forth in § 23.1-305 or any other matters the institution deems appropriate;
8. The identification of (i) new programs or initiatives including quality improvements and (ii) institution-specific funding based on particular state policies or institution-specific programs, or both, as provided in subsection C of § 23.1-307; and
9. An institutional student financial aid commitment that, in conjunction with general funds appropriated for that purpose, provides assistance to students from both low-income and middle-income families and takes into account the information and recommendations resulting from the review of federal and state financial aid programs and institutional practices conducted pursuant to subdivisions B 2 and C 1 of § 23.1-309.

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 College Savings Plan. The chief executive officer of the Virginia College Savings Plan shall provide to each institution the Plan's assumptions underlying the contract pricing of the program.

**Legislative Reference:**

**§ 23.1 - 306. Institutional Six-Year Plans.**

*F. 1. In conjunction with the plans included in the six-year plan as set forth in subsection D, each public institution of higher education, Richard Bland College, and the Virginia Community College System may submit one innovative proposal with clearly defined performance measures, including any request for necessary authority or support from the Commonwealth, for a performance pilot. If the General Assembly approves the proposed performance pilot, it shall include approval language in the general appropriation act. A performance pilot shall advance the objectives of this chapter by addressing innovative requests related to college access, affordability, cost predictability, enrollment management subject to specified commitments regarding undergraduate in-state student enrollment, alternative tuition and fee structures and affordable pathways to degree attainment, internships and work study, employment pathways for undergraduate Virginia students, strategic talent development, state or regional economic development, pathways to increase timely degree completion, or other priorities set out in the general appropriation act.*

*2. A performance pilot may include or constitute an institutional partnership performance agreement, which shall be set forth in a memorandum of understanding that includes mutually dependent commitments by the institution, the Commonwealth, and identified partners, if any, related to one or more of the priorities set forth in subdivision 1 or set forth in a general appropriation act. No such institutional partnership performance agreement shall create a legally enforceable obligation of the Commonwealth.*

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

*4. Development and approval of any performance pilot proposal shall proceed in tandem with consideration of the institution's six-year plan, as follows:*

*a. An institution that intends to propose a performance pilot shall communicate that intention as early as practicable, but not later than April 1 of the year in which the performance pilot will be proposed, to the reviewers listed in subsection B, the co-chairmen of the Joint Subcommittee on the Future Competitiveness of Virginia Higher Education, and the Governor. In developing a proposed performance pilot, the institution shall consider the Commonwealth's educational and economic policies and priorities, including those reflected in the Virginia Plan for Higher Education issued by the Council, the economic development policy developed pursuant to § 2.2-205, the strategic plan developed pursuant to § 2.2-2237.1, relevant regional economic growth and diversification plans prepared by regional councils pursuant to the Virginia Growth and Opportunity Act (§ 2.2-2484 et seq.), and any additional guidance provided by the Joint Subcommittee on the Future Competitiveness of Virginia Higher Education and the Governor.*

*b. An institution that submits a performance pilot shall include the one innovative proposal with clearly defined performance measures, and any corresponding authority and support requested from the Commonwealth, with its submission of the preliminary version of its six-year plan pursuant to clause (ii) of subsection A or with its preliminary amendment or affirmation submission pursuant to clause (iii) of subsection A.*

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

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

***Six-Year Plans (2025): 2026-27 through 2031-32***

**Due: July 3, 2025**

***Institution:***

University of Virginia's College at Wise
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***Institution UNITID:***

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***Individual responsible for plan***

***Name(s) & Title(s):***

<a href="#">Joseph Kiser, Vice Chancellor for Finance and Operations</a>
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**Part 1: Undergraduate Tuition and Mandatory Fee Increase Plans in 2026-28 Biennium**  
**University of Virginia's**  
**College at Wise**

**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 2026-28 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				
	2025-26 Charge (BOV approved)	2026-27		2027-28	
		Planned Charge	% Increase	Planned Charge	% Increase
In-State UG Tuition	\$6,160	\$6,314	2.5%	\$6,472	2.5%
In-State UG Mandatory E&G Fees	\$188	\$193	2.5%	\$198	2.5%
In-State UG Mandatory non-E&G Fees	\$5,432	\$5,568	2.5%	\$5,707	2.5%
<b>In-State UG Total</b>	<b>\$11,780</b>	<b>\$12,075</b>	<b>2.5%</b>	<b>\$12,376</b>	<b>2.5%</b>
Out-of-State UG Tuition	\$21,662	\$22,204	2.5%	\$22,759	2.5%
Out-of-State UG Mandatory E&G Fees	\$916	\$939	2.5%	\$962	2.5%
Out-of-State UG Mandatory non-E&G Fees	\$5,432	\$5,568	2.5%	\$5,707	2.5%
<b>Out-of-State UG Total</b>	<b>\$28,010</b>	<b>\$28,710</b>	<b>2.5%</b>	<b>\$29,428</b>	<b>2.5%</b>

Part 2: Revenue: 2024-25 through 2031-32  
University of Virginia's College at Wise

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.

In line 25, enter E&G GF revenues for the current bienium, including any funds administratively transferred into your E&G programs during the fiscal year. The GF amount in each year of 2027-2032 should remain the same as the 2025-26 general fund for E&G. The formulas will automatically hold that constant for the remaining years of 2027 to 2032

Items	2024-2025 (Actual)	2025-2026 (Estimated)		2026-2027 (Planned)		2027-2028 (Planned)		2028-2029 (Pro Forma)		2029-2030 (Pro Forma)		2030-2031 (Pro Forma)		2031-2032 (Pro Forma)		2024-2032 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	\$6,312,180	\$6,003,434	-4.9%	\$6,856,751	14.2%	\$7,076,165	3.2%	\$7,102,053	0.4%	\$7,127,941	0.4%	\$7,147,357	0.3%	\$7,173,245	0.4%	14%	1.8%
Undergraduate, Out-of-State	\$1,266,672	\$1,750,040	38.2%	\$2,200,976	25.8%	\$2,227,868	1.2%	\$2,257,099	1.3%	\$2,279,858	1.0%	\$2,292,802	0.6%	\$2,292,802	0.0%	81%	8.8%
Graduate, In-State	\$284,726	\$102,432	-64.0%	\$126,564	23.6%	\$129,744	2.5%	\$129,744	0.0%	\$129,744	0.0%	\$129,744	0.0%	\$129,744	0.0%	-54%	-10.6%
Graduate, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
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	%	%	%
PharmD, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
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	\$3,196,232	\$2,960,096	-7.4%	\$3,023,078	2.1%	\$3,032,996	0.3%	\$3,035,712	0.1%	\$3,037,466	0.1%	\$3,039,984	0.1%	\$3,040,776	0.0%	-5%	-0.7%
Total E&G NGF Revenue	\$11,059,810	\$10,816,002	-2.2%	\$12,207,369	12.9%	\$12,466,773	2.1%	\$12,524,608	0.5%	\$12,575,009	0.4%	\$12,609,887	0.3%	\$12,636,567	0.2%	14%	1.9%
E&G GF Revenue (assume flat after 2026)	\$32,646,615	\$31,973,177	-2.1%	\$31,973,177	0.0%	\$31,973,177	0.0%	\$31,973,177	0.0%	\$31,973,177	0.0%	\$31,973,177	0.0%	\$31,973,177	0.0%	-2%	-0.3%
Total E&G Revenue	\$43,706,425	\$42,789,179	-2.1%	\$44,180,546	3.3%	\$44,439,950	0.6%	\$44,497,785	0.1%	\$44,548,186	0.1%	\$44,583,064	0.1%	\$44,609,744	0.1%	2%	0.3%

Part 2: Revenue: 2024-25 through 2031-32  
University of Virginia's College at Wise

Instructions: Provide a pro forma analysis of total tuition revenue in years 2029-2032 by holding T&F constant at the planned 2027-28 rate while incorporating your institution's submitted enrollment projections for each year through 2032. 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.

Auxiliary Revenue	2024-2025 (Actual)	2025-2026 (Estimated)		2026-2027 (Planned)		2027-2028 (Planned)	
	Total Revenue	Total Revenue	Chg	Total Revenue	Chg	Total Revenue	Chg
In-State undergraduates	\$5,559,034	\$5,345,664	-3.8%	\$6,136,705	14.8%	\$6,310,337	2.8%
All Other students	\$604,658	\$1,186,184	96.2%	\$1,362,629	14.9%	\$1,401,183	2.8%
Total non-E&G fee revenue	\$6,163,692	\$6,531,848	6.0%	\$7,499,334	14.8%	\$7,711,520	2.8%
Total Auxiliary Revenue	\$13,097,518	\$14,033,230	6.0%	\$15,269,415	8.8%	\$15,760,638	3.2%

### Part 3: Financial Aid Plan: 2025-26 through 2031-32

#### University of Virginia's College at Wise

**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.)

**The methodology used for completing this report MUST match the methodology used by the institution's financial aid office for completing the annual financial aid data file and related reports.**

"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

**\*2024-25 (Actual) Please see footnote below**

T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)	Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$6,312,180	\$50,000	0.8%	\$50,000	\$33,169	\$217,403	\$6,562,752	4.6%	\$0 <span>Compliant</span>
Undergraduate, Out-of-State	\$1,266,672	\$0	%	\$0	\$1,771,058	\$0	\$3,037,730	58.3%	
Graduate, In-State	\$284,726	\$0	%	\$0	\$0	\$0	\$284,726	0.0%	
Graduate, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$7,863,578	\$50,000	0.6%	\$50,000	\$1,804,227	\$217,403	\$9,885,208	21.0%	

**2025-26 (Estimate)**

T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)	Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$6,003,434	\$50,000	0.8%	\$50,000	\$33,169	\$217,403	\$6,254,006	4.8%	\$0 <span>Compliant</span>
Undergraduate, Out-of-State	\$1,750,040	\$0	%	\$0	\$1,771,058	\$0	\$3,521,098	50.3%	
Graduate, In-State	\$102,432	\$0	%	\$0	\$0	\$0	\$102,432	0.0%	
Graduate, Out-of-State	\$3	\$0	%	\$0	\$0	\$0	\$3	0.0%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$7,855,909	\$50,000	0.6%	\$50,000	\$1,804,227	\$217,403	\$9,877,539	21.0%	

## Allocation of Tuition Revenue Used for Student Financial Aid

2026-27 (Planned)								Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)		
Undergraduate, In-State	\$6,856,751	\$50,000	0.7%	\$50,000	\$33,169	\$217,403	\$7,107,323	4.2%	\$0 <span>Compliant</span>
Undergraduate, Out-of-State	\$2,200,976	\$0	%	\$0	\$1,771,058	\$0	\$3,972,034	44.6%	
Graduate, In-State	\$126,564	\$0	%	\$0	\$0	\$0	\$126,564	0.0%	
Graduate, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$9,184,291	\$50,000	0.5%	\$50,000	\$1,804,227	\$217,403	\$11,205,921	18.5%	

2027-28 (Planned)									
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)	Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$7,076,165	\$50,000	0.7%	\$50,000	\$33,169	\$217,403	\$7,326,737	4.1%	\$0 Compliant
Undergraduate, Out-of-State	\$2,227,868	\$0	%	\$0	\$1,771,058	\$0	\$3,998,926	44.3%	
Graduate, In-State	\$129,744	\$0	%	\$0	\$0	\$0	\$129,744	0.0%	
Graduate, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$9,433,777	\$50,000	0.5%	\$50,000	\$1,804,227	\$217,403	\$11,455,407	18.1%	

2028-29 (Pro Forma)								Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)		
Undergraduate, In-State	\$7,102,053	\$50,000	0.7%	\$50,000	\$33,169	\$217,403	\$7,352,625	4.1%	\$0 <span>Compliant</span>
Undergraduate, Out-of-State	\$2,257,099	\$0	%	\$0	\$1,771,058	\$0	\$4,028,157	44.0%	
Graduate, In-State	\$129,744	\$0	%	\$0	\$0	\$0	\$129,744	0.0%	
Graduate, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$9,488,896	\$50,000	0.5%	\$50,000	\$1,804,227	\$217,403	\$11,510,526	18.0%	

## Allocation of Tuition Revenue Used for Student Financial Aid

2029-30 (Pro Forma)									
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)	Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$7,127,941	\$50,000	0.7%	\$50,000	\$33,169	\$217,403	\$7,378,513	4.1%	\$0 <span>Compliant</span>
Undergraduate, Out-of-State	\$2,279,858	\$0	%	\$0	\$1,771,058	\$0	\$4,050,916	43.7%	
Graduate, In-State	\$129,744	\$0	%	\$0	\$0	\$0	\$129,744	0.0%	
Graduate, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$9,537,543	\$50,000	0.5%	\$50,000	\$1,804,227	\$217,403	\$11,559,173	17.9%	

2030-31 (Pro Forma)								Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)		
Undergraduate, In-State	\$7,147,357	\$50,000	0.7%	\$50,000	\$33,169	\$217,403	\$7,397,929	4.1%	
Undergraduate, Out-of-State	\$2,292,802	\$0	%	\$0	\$1,771,058	\$0	\$4,063,860	43.6%	
Graduate, In-State	\$129,744	\$0	%	\$0	\$0	\$0	\$129,744	0.0%	
Graduate, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$9,569,903	\$50,000	0.5%	\$50,000	\$1,804,227	\$217,403	\$11,591,533	17.9%	

2031-32 (Pro Forma)									
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)	Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i \$0 Compliant
Undergraduate, In-State	\$7,173,245	\$50,000	0.7%	\$50,000	\$33,169	\$217,403	\$7,423,817	4.0%	
Undergraduate, Out-of-State	\$2,292,802	\$0	%	\$0	\$1,771,058	\$0	\$4,063,860	43.6%	
Graduate, In-State	\$129,744	\$0	%	\$0	\$0	\$0	\$129,744	0.0%	
Graduate, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$9,595,791	\$50,000	0.5%	\$50,000	\$1,804,227	\$217,403	\$11,617,421	17.8%	

\* 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: 2026-27 through 2031-33  
University of Virginia's College at Wise

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 Q), including a 2% salary increase and 1% health insurance premium 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 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, not an annual increase. Please update total cost formulas if necessary. Institutions should assume no general fund (GF) support in 2026-28 in this tab aside from the instructed assumptions for salary and health insurance premium increases. A separate tab (Tab 6) is provided for institutions to request additional GF support for 2026-28. 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 collect the estimated E&G expenditures of 2024-25 and 2025-26 as baselines for Tab 5 Pro Forma.

For the 2028-30 bienium and 2030-2032 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 FY2027 to FY2032 for those employees eligible for the state-supported salary increases in the 2024-2026 biennium. In columns H and L, institutions should use the estimated GF share of these increases provided in the salary and health insurance calculator file. If an institution plans to use its own funds to provide additional salary increases, add lines below the "increased sstate health insurance cost" and specify salary amount by employee type and associated fringe benefit costs, but do not put any dollar amount in Columns H and L.

Please estimate total E&G expenditures for 2024-25 and 2025-26	
Total Estimated 2024-25 E&G Expenditures	\$40,732,491
Total Estimated 2025-26 E&G Expenditures	\$41,657,655

2026-2027 (Auto-calculated)
Implied GF share
53.4%

2027-2028 (Auto-calculated)
Implied GF share
53.43%

Incremental amounts relative to 2025-26 estimated baseline

Short Title	Virginia Strategic Plan Goal(s)	2026-2027				2027-2028				2028-2029	2029-2030	2030-2031	2031-2032	Explanation Please be brief; reference specific narrative question for more detail.
		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														
2% annual state salary increase cost		\$536,964	\$0	\$250,088	\$286,876	\$1,084,667	\$0	\$505,178	\$579,489	\$1,643,325	\$2,213,156	\$2,794,384	\$3,387,237	UVA Wise does not participate in the state health care plan and is part of the health plan provided by UVA
1% annual state health insurance increase cost		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Annual health insurance increase cost		\$547,612	\$0	\$547,612	\$0	\$588,548	\$0	\$588,548	\$0	\$465,655	\$606,052	\$758,303	\$923,137	
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Inflationary non-personnel cost increases														
Contractual services		\$66,658	\$66,658	\$0	\$0	\$101,494	\$101,494	\$0	\$0	\$137,375	\$174,333	\$212,400	\$251,608	Projecting a 3% inflationary increase
Utilities		\$134,662	\$134,662	\$0	\$0	\$212,906	\$0	\$212,906	\$0	\$298,471	\$391,961	\$511,068	\$636,011	Projecting a 3% inflationary increase
Non-personnel Cost		\$1,301,998	\$1,301,998	\$0	\$0	\$1,982,436	\$1,305,685	\$676,751	\$0	\$2,683,288	\$3,405,165	\$4,148,698	\$4,914,537	Projecting a 3% inflationary increase
VITA		\$174	\$0	\$174	\$0	\$356	\$0	\$356	\$0	\$549	\$752	\$966	\$1,191	Projecting a 5.36% inflationary increase
Financial aid expansion														
Add'l In-State Student Financial Aid from Tuition Rev		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Add'l Out-of-State Student Financial Aid from Tuition Rev		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	

Part 4: ACADEMIC-FINANCIAL PLAN: 2026-27 through 2031-33  
University of Virginia's College at Wise

		2026-2027				2027-2028				2028-2029	2029-2030	2030-2031	2031-2032	Explanation Please be brief; reference specific narrative question for more detail.
Short Title		Total Amount	Reallocation	Amount from Tuition Revenue	Amount from GF (Salaries & benefits)	Total Amount	Reallocation	Amount from Tuition Revenue	Amount from GF (Salaries & benefits)	Total Amount (Pro Forma)	Total Amount (Pro Forma)	Total Amount (Pro Forma)	Total Amount (Pro Forma)	
New/expanded academic programs														
Masters in Education		\$481,366	\$191,095	\$290,271	\$0	\$495,807	\$184,289	\$311,518	\$0	\$510,682	\$526,002	\$541,782	\$558,036	
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Other academic & student support strategies & initiatives														
Academic Compliance		\$75,450	\$75,450	\$0	\$0	\$77,765	\$0	\$77,765	\$0	\$80,098	\$82,501	\$84,976	\$87,525	
Expand Academic Advising		\$107,650	\$107,650	\$0	\$0	\$110,880	\$50,000	\$60,880	\$0	\$114,206	\$117,633	\$121,162	\$124,796	
Mental Health & Wellness Expansion		\$76,342	\$0	\$76,342	\$0	\$78,664	\$0	\$78,664	\$0	\$81,024	\$83,455	\$85,958	\$88,537	
Research Expansion		\$370,735	\$143,855	\$226,880	\$0	\$382,115	\$143,855	\$238,260	\$0	\$393,578	\$405,386	\$417,547	\$430,074	
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Other non-academic strategies & initiatives														
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
[Add lines & descriptions here]		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Additional Funding Need		\$3,699,611	\$2,021,368	\$1,391,367	\$286,876	\$5,115,639	\$1,785,323	\$2,750,827	\$579,489	\$6,408,251	\$8,006,396	\$9,677,244	\$11,402,690	

Auto Check Match=0 (Must not be greater than incremental Tuit Rev in Part 2). If not match, please provide explanations	
2026-2027	2027-2028
\$0	-\$1,100,056
	For FY28 UVA Wise is required to fund one additional pay period for a total of 27 pay periods rather than the standard 26. This one time cost exceeds expected tuition revenue for FY28.

Part 5: Six-year Pro Forma Calculations: 2024-25 through 2031-32  
University of Virginia's College at Wise

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 2024-25 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.

															From FY25-FY32		
Baseline Pro Forma Surplus/Deficit	2024-2025 (Actual)	2025-2026 (Est.)	Chg	2026-2027 (Est.)	Chg	2027-2028 (Plan)	Chg	2028-2029	Chg	2029-2030	Chg	2030-2031	Chg	2031-2032	Chg	Total Chg	Avg Annual Chg
Total E&G GF Revenue from Tab2, flat after 2027-28	32,646,615	31,973,177	-2%	32,260,053	1%	32,552,666	1%	32,851,132	1%	33,155,567	1%	33,466,091	1%	33,782,626	1%	3%	0%
Tuition discount rate	21.0%	21.0%	0.0%	18.5%	-2.5%	18.1%	-0.4%	18.0%	-0.1%	17.9%	-0.1%	17.9%	-0.1%	17.8%	0.0%	-15%	-2%
Total E&G NGF Revenue	11,059,810	10,816,002	-2%	12,207,369	13%	12,466,773	2%	12,524,608	0%	12,575,009	0%	12,609,887	0%	12,636,567	0%	14%	2%
Incremental E&G NGF Revenue vs. prior yr	(243,808)	%		1,391,367	-671%	259,404	-81%	57,835	-78%	50,401	-13%	34,878	-31%	26,680	-24%	-111%	-16%
Total E&G Revenue	43,706,425	42,789,179	-2%	44,467,422	4%	45,019,439	1%	45,375,740	1%	45,730,576	1%	46,075,978	1%	46,419,393	1%	8%	1%
Implied GF % of E&G	74.7%	74.7%	0.0%	72.5%	-2.2%	72.3%	-0.2%	72.4%	0.1%	72.5%	0.1%	72.6%	0.1%	72.8%	0.1%	-3%	0%
Total E&G Expenditures	40,732,491	41,657,655	2%	43,335,898	4%	44,987,971	4%	46,280,583	3%	47,878,728	3%	49,549,576	3%	51,275,022	3%	26%	4%
Incremental E&G Expenditures vs. 2025-26				3,699,611		5,115,639	38%	6,408,251	25%	8,006,396	25%	9,677,244	21%	11,402,690	18%	208%	30%
Reallocation of existing dollars (flat after 2027-28)				2,021,368		1,785,323	-12%	1,785,323		1,785,323		1,785,323		1,785,323	0%	-12%	-2%
Pro Forma Surplus/Deficit	2,973,934	1,131,524	-62%	1,131,524	0%	31,468	-97%	(904,843)	-2975%	(2,148,152)	137%	(3,473,598)	62%	(4,855,629)	40%	-529%	-78%
Incremental Surplus/Deficit	2,973,934	(1,842,410)	-162%	0	-100%	(1,100,056)	#####	(936,311)	-15%	(1,243,309)	33%	(1,325,446)	7%	(1,382,031)	4%	-1382030673%	-197432953%

What would a constant GF/NGF ratio at 2025-26 levels imply for T&F and GF increases?																														
	2024-2025 (Actual)			2025-2026 (Est.)			2026-2027			2027-2028			2028-2029			2029-2030			2030-2031			2031-2032			Total Chg			Avg Annual Chg		
GF % of E&G				Chg			Chg			Chg			Chg			Chg			Chg			Chg			Chg			Chg		
Implied incremental T&F increase (%)				0%			0%			0%			0.0%			0.0%			0.0%			0.0%			0.0%			0.0%		
Implied incremental T&F increase (%)				-163%			-100%			74.7%			-0.3%			74.7%			-0.3%			74.7%			0.1%			-36%		
Implied incremental GF increase (%)				4.3%			2.2%			2.2%			2.5%			1.9%			2.5%			2.8%			0.2%			2.8%		
Implied incremental GF increase (%)				-163.3%			-100.0%			2.1%			-0.4%			2.1%			0.7%			3.0%			0.2%			3.1%		

Blended Scenario Calculator - Share of Deficit Covered by Each Source (Must add up to 100%)	Expenditure reductions	0%	<< Input percentages here														
	T&F increases	0%															
	GF increases	0%															
	TOTAL	0%															
	2024-2025 (Actual)	2025-2026 (Est.)	Chg	2026-2027	Chg	2027-2028	Chg	2028-2029	Chg	2029-2030	Chg	2030-2031	Chg	2031-2032	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%	%	%	%
Implied incremental T&F increase (%)	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%	%	%	%
Implied GF % of E&G	74.7%	74.7%	0.0%	72.5%	-2.9%	72.3%	-0.3%	72.4%	0.1%	72.5%	0.1%	72.6%	0.2%	72.8%	0.2%	-2.6%	0%

Part 6: General Fund (GF) Requests in 2026-2028 Biennium

University of Virginia's College at Wise

Instructions: Indicate items for which you anticipate making a request for state general fund in the 2026-28 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.

Note: If your insitution thinks you cannot afford the nongeneral fund share of a statewide 2% annual salary increase, you can submit a request for GF support with explanations and assumptions in this tab.

Priority Ranking	Initiatives Requiring General Fund Support						Notes/Explanation  Please be brief; reference specific narrative question for more detail.
			Biennium 2026-2028 (7/1/26-6/30/28)				
	Strategies (Match Academic-Financial Worksheet Short Title)	Category (Select best option from dropdown menu)					
			2026-2027		2027-2028		
			Total Amount	GF Support	Total Amount	GF Support	
1	Fund Tuition Moderation Support	General Operations Support	\$981,800	\$981,800	\$981,800	\$981,800	Requests the continuation of one-time state funding allocated in FY25 for use in the 2025-26 academic year to help limit tuition and fee increases for in-state undergraduate students. As this funding was one-time in nature, UVA Wise seeks to have it incorporated into base funding for the 2026-2028 biennium budget to ensure continued affordability for Virginia students.
2	Fund In-state Undergraduate Financial Aid	Financial Aid	\$141,000	\$141,000	\$141,000	\$141,000	Requests the continuation of one-time state funding provided in FY25 for use in the 2025-26 academic year for in-state need-based undergraduate financial aid. As the funding was one-time in nature, UVA Wise seeks to have it incorporated into its base funding in the 2026-2028 biennium budget to ensure sustained support for financially vulnerable students.
3	Enrollment & Retention	Enrollment management	\$1,643,014	\$1,643,014	\$1,705,472	\$1,705,472	UVA Wise is requesting funding to support enrollment management marketing, increase the use of technology in the recruitment and admission of students, expand student support services through wellness activities, increase student retention through academic support technology and increased programming.
4	Affordable Access	General Operations Support	\$424,507	\$424,507	\$451,697	\$451,697	UVA Wise is requesting additional funding to keep tuition and fee increases low for students and families. Because of inflationary pressures in goods and services (to include healthcare) and partially funded compensation increases, these funds would help subsidize the need for raising tuition and fees. This is funding needed in addition to the general fund request for continuation of one-time state funding for Funding Tuition Moderation Support.
5	Expand Graduate Programs	Education Innovation / Online Learning	\$472,765	\$472,765	\$487,252	\$487,252	UVA Wise is requesting additional funding to expand the M.Ed. Program to include Library Media and Special Education program, as well as the implementation of the data analytics program to include artificial intelligence integration.

Part 6: General Fund (GF) Requests in 2026-2028 Biennium  
University of Virginia's College at Wise

Instructions: Indicate items for which you anticipate making a request for state general fund in the 2026-28 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.

Note: If your insitution thinks you cannot afford the nongeneral fund share of a statewide 2% annual salary increase, you can submit a request for GF support with explanations and assumptions in this tab.

Priority Ranking	Initiatives Requiring General Fund Support						Notes/Explanation Please be brief; reference specific narrative question for more detail.
			Biennium 2026-2028 (7/1/26-6/30/28)				
	Strategies (Match Academic-Financial Worksheet Short Title)	Category (Select best option from dropdown menu)					
			2026-2027		2027-2028		
			Total Amount	GF Support	Total Amount	GF Support	
6	Student Mobile Technology	Education Innovation / Online Learning	\$1,100,000	\$1,100,000	\$1,133,000	\$1,133,000	UVA Wise is requesting funding to support the technology access program we created in 2019 that equips every full-time undergraduate student with an iPad, Apple Pencil and smart keyboard. We have found that providing students with technology—who would not otherwise have a device—ensures students can attend college, remain enrolled (it provides lower cost digital text book options), enhances their wellness, and serves as a portfolio for their career readiness (see narrative C2 for more info). Funding this initiative would eliminate the student fee that was imposed on our students. This will support our affordability efforts to our students and their families.
7	Research	Research	\$370,735	\$370,735	\$382,115	\$382,115	UVA Wise is requesting funding to further support research opportunities at the College. The College is seeking to hire a director and support staff to assist in planning while also focusing on applied research collaboration with the University of Virginia to develop knowledge, expertise, and experiential learning opportunities for students in areas of study important to our region. This will provide additional support to Healthy Appalachia Institute which will implement population health programs in collaboration with regional community, business, health, and education partners, as well as teach public health courses at the College.
8	VMSDEP	Financial Aid	\$217,403	\$217,403	\$217,403	\$217,403	Requests increased state support for the significant growth in state mandated VMSDEP tuition waivers at UVA Wise.
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	
			\$0	\$0	\$0	\$0	

Part 6: General Fund (GF) Requests in 2026-2028 Biennium  
University of Virginia's College at Wise

Instructions: Indicate items for which you anticipate making a request for state general fund in the 2026-28 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.

Note: If your insitution thinks you cannot afford the nongeneral fund share of a statewide 2% annual salary increase, you can submit a request for GF support with explanations and assumptions in this tab.

Priority Ranking	Initiatives Requiring General Fund Support						Notes/Explanation  Please be brief; reference specific narrative question for more detail.
			Biennium 2026-2028 (7/1/26-6/30/28)				
	Strategies (Match Academic-Financial Worksheet Short Title)	Category (Select best option from dropdown menu)					
			2026-2027		2027-2028		
			Total Amount	GF Support	Total Amount	GF Support	
			\$5,351,224	\$5,351,224	\$5,499,739	\$5,499,739	

**Part 7: E&G Capital Requests in 2026-2028 Biennium**  
**University of Virginia's College at Wise**

Instructions: Indicate E&G capital projects for which you anticipate making a request for state general fund in the 2026-28 biennium to complete a project. Projects should include planning costs and then funding for construction. Describe in the Notes column the justification, alternatives explored, and how the projects align with enrollment growth and facility condition index. If the project has other fund sources, please indicate source.

E&G Capital Projects Requests Biennium 2026-2028 (7/1/26-6/30/28)										
Priority Ranking	Capital Project / Building	Category (Select best option from dropdown menu)	Facility Condition Index (for renovation projects only) if available	2026-2027			2027-2028			Notes/Explanation Please be brief; reference specific justification, alternatives and additional fund sources.
				Total Amount	NGF Support	GF Support	Total Amount	NGF Support	GF Support	
1	Darden Hall Renovation	Improvements-Infrastructure Repairs	11%	\$38,700,000	\$0	\$38,700,000	\$0	\$0	\$0	Planning is underway and the College is seeking full funding for construction activities to begin July 1, 2026. Darden Hall renovation will renew one of the College's most heavily used academic facilities, updating its outmoded and overtaxed infrastructural systems as well as presenting an opportunity for The College to grow several key academic programs with the renewed learning spaces. The recently approved graduate level programming in the Education department needs the dedicated space and programming to grow and develop.
2	Technology Classroom Building	New Construction		\$68,700,000	\$3,000,000*	\$68,700,000	\$0	\$0	\$0	The building will offer classrooms and technology-focused lab spaces to become the integrated location for both new growth programs offering degrees in Applied Data Analytics, Integrated Science and Technology and Data Science; as well as space for established bachelor's degree programs in Mathematics, Computer Science, and Software Engineering. This facility will also provide space for the new Hospitality & Tourism program. *Note: UVA Wise Advancement has secured a \$3,000,000 gift to support equipment, supplies and program support for this building.
3	Multi-Use Facility	New Construction		\$64,200,000	\$0	\$64,200,000	\$0	\$0	\$0	Design and construct a 140,000 sq ft on-campus multi-use facility, offering a destination venue unlike any other in far southwest Virginia, not only providing space to support the need for conferences, training, trade shows, area medical events, but also to support the need for a recreational venue that does not exist west of Roanoke.
4	Zehmer Hall Renovation	Improvements-Infrastructure Repairs	6%				\$27,300,000	\$0	\$27,300,000	Seeking funding to rennovate this heavily used academic space. The renovation is needed to update the aging facility and provide students a more modern academic enviroment. Key infrastructural updates are needed as existing academic programs within this building are growing as the college increases its enrollment. In the 2024-2026 biennium, the Commonwealth provided additional Maintenace Reserve funding to address the failing roof and aid in repiar of the current HVAC infrastructure.
5	Sandridge Science Center Lab Wing Renovation	Improvements-Infrastructure Repairs	2.30%	\$0	\$0	\$0	\$40,500,000	\$0	\$40,500,000	Seeking funding to renovate and update the agining facility and infrastructure that supports classroom and research lab spaces for the department of natural sciences.
					\$0	\$0	\$0	\$0	\$0	
					\$0	\$0	\$0	\$0	\$0	
					\$0	\$0	\$0	\$0	\$0	
					\$0	\$0	\$0	\$0	\$0	
					\$0	\$0	\$0	\$0	\$0	
					\$0	\$0	\$0	\$0	\$0	
					\$0	\$0	\$0	\$0	\$0	
					\$0	\$0	\$0	\$0	\$0	

					\$0	\$0	\$0	\$0	\$0	
					\$0	\$0	\$0	\$0	\$0	
					\$0	\$132,900,000	\$67,800,000	\$0	\$67,800,000	

**Part 8: Degree/Certificate Programs in 2026-2028 Biennium**  
**University of Virginia's College at Wise**

Instructions: In the table below indicate which degree and/or certificate programs the institution plans to establish, grow, and close in the upcoming 2026-28 biennium. SCHEV's new degree program approval process will require all new degree programs for the upcoming biennium to be included in the Six-Year Plan table below.

Academic Degree/Certificate Programs Biennium 2026-2028					
Degree Designation	Program Name	Establish/Grow/Close	CIP Code	Anticipated Start/End Date	Explanation (please describe projected costs/savings from program establishment, growth, or closure)
N/A	Certificate in Technology Management and Data Analytics	Establish	N/A	Anticipated Start: January 2026	No additional costs
MS	Masters of Science in Technology Management and Data Analytics	Establish	52-1399	Anticipated Start: August 2026	We will hire one additional faculty member at approximately \$100,000/year
MSN	MSN-FNP	Establish	51-3805	Anticipated Start: August 2026	We will hire one additional faculty member at approximately \$100,000/year; this salary line is already in the budget
MEd	Masters in Education-Library Media	Grow	13-0101	Anticipated Start: August 2025	We will hire one additional faculty member at approximately \$65,000 per year with a modest operating budget increase. An administrative assistant for the Master's of Education Program will be needed as well, budgeted at \$45,000 per year.
MEd	Masters in Education-Special Education	Grow	13-0101	Anticipated Start: August 2025	We will hire one additional faculty member at approximately \$65,000 per year with a modest operating budget increase. An administrative assistant for the Master's of Education Program will be needed as well, budgeted at \$45,000 per year.
BS	Information Science	Establish	11-0103	Anticipated Start: August 2026	No additional costs
MS	Criminal Justice	Establish	43-0103	Anticipated Start: August 2026	We anticipate modest additional cost due to the hiring of several adjunct faculty.
BA	Communication Studies	Establish	9-0101	Anticipated Start: August 2026	This would be part of a reorganization to tie academic programs to a more accurate CIP code and to bring existing programs into alignment with SCHEV requirements.

<b>BA</b>	Psychology	Establish	42-0101	Anticipated Start: August 2026	This would be part of a reorganization to tie academic programs to a more accurate CIP code and to bring existing programs into alignment with SCHEV requirements.
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## 2025 SIX-YEAR PLAN NARRATIVE (Part II)

INSTITUTION: UVA Wise

### OVERVIEW

The six-year plan should describe the institution's goals as they relate to the Commonwealth's goals which are 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.

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.

The intent of this process is for each of the commonwealth's higher education institutions to complete a consistent, detailed biennial strategic plan, with an update to that plan in the second year of the biennium. This process should coincide with any planning processes completed by the institution and presented to their board of visitors. It is also expected that the plans rely on the fact packs maintained by SCHEV for key statistics and financial metrics.

***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 session 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. Describe how your institutional strategic plan goals align to your institutions mission. Please share any plans you have to change your mission over the six-year period.**

For more than 70 years, the University of Virginia's College at Wise (UVA Wise) has remained dedicated to building a community of learners with the drive to serve and lead in their communities. In the College's most recent strategic plan, "Your College for a Lifetime," UVA Wise Chancellor Donna P. Henry states that UVA Wise provides an education to empower graduates for the world they live in today and for the world they will inherit and shape in 25, 50, or, perhaps, 75 years.

Since the adoption of this Strategic Plan, and with more than \$12 million invested by the Commonwealth in the 2022-24 biennium, UVA Wise has enhanced its ability to reimagine the college experience for the 21st century. We've delivered on our commitment to provide an accessible, affordable and high-quality postsecondary education to students for whom a college degree may seem like an unattainable goal—in keeping with the Commonwealth's strategic plan for higher education.

Throughout the past few years, UVA Wise has:

- Increased enrollment year over year for the past two years above the College's five-year average (fact pack "enrollment trends" chart A)
- Increased its undergraduate, first-time-in-college retention, working toward an ultimate goal of an increased six-year graduation rate (fact pack "overall FTIC retention rates" chart D)
- Debuted new academic programs that meet the needs not only of students but of regional and Commonwealth employers (fact pack "graduates and industries with the highest job growth" chart B); and
- Held tuition flat, even reducing the amount of money students borrow to complete their college education at UVA Wise (fact pack "how much debt" chart B) and increasing social mobility for graduates from lower-income backgrounds (fact pack "economic mobility" chart C)

While the College continues to build on these strengths, it does not anticipate changing its mission, as UVA Wise's current Strategic Plan was formed during an update to its mission and, together, the College and Commonwealth's plans for higher education align, particularly around the shared values of access and affordability (goals one and two of the "Pathways to Opportunities" plan from SCHEV and goals two, four and five of UVA Wise's "Your College for a Lifetime").

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

While UVA Wise's primary focus will always remain our students -- ensuring they can access a higher education and ensuring their academic and co-curricular experiences prepare them for life after college—those students form a vital pool of talent that will contribute to the local and regional economies and communities they inhabit.

As such, UVA Wise continues to grow not only in its capacity to provide affordable and high-quality education to students but also in its work to help our communities and region grow.

**UVA Wise's strengths include:**

- Assisting students with access to higher education, particularly first-generation students from low-income backgrounds.
- Supporting experiential learning and career readiness for all students.
- Keeping college affordable: we have held tuition flat in recent years while increasing private fundraising. Together with a legislative investment in 2022, we have reduced the amount of dollars our students borrow to complete their college education. (fact pack "economic mobility" chart D and "how much debt" chart B) while also contributing to an ecosystems approach that has facilitated increased graduate earnings (fact pack "economic mobility" chart C).
- Attracting and educating talent for the College, its surrounding communities, *and* employers, but while also facilitating community and economic development efforts to grow the region's economy which assist with the aforementioned economic mobility and earnings for our graduates.

**The College's opportunities for improvement include:**

- Further expand graduate programs. Debuted in fall 2023, a thoroughly researched Master of Education, with a goal of admitting 15-20 students, now enrolls more than 50 per semester and has graduated two classes of M.Ed. earners.
- Increase the graduation rate of students, which is in process given recent increases in retention of students (fact pack "overall FTIC retention rates" chart D).
- Continue to grow access and opportunity through innovation (see more in A3).

**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 statewide strategic plan for higher education, to the strengths and/or opportunities for improvement mentioned above, and will ultimately drive better outcomes for students. If the strategy has a general fund component (operating and/or capital, equipment, renovation) please include the operating request in the "General Fund Request" tab and the capital or equipment request in the "Capital" tab of the excel file.**

UVA Wise's strategic aims for the coming biennium align closely with the Commonwealth's strategic priorities for higher education and include:

1. **Grow enrollment through targeted program development.** As the College continues to grow enrollment, one key goal is adding new programs that will provide upward mobility for students as employees, supply employers' talent needs, and generate additional revenue for the College itself.
  - a. Programs to be developed include:
    - i. Certificate in Technology Management and Data Analytics, to be built into a Master of Science in Technology Management and Data Analytics
    - ii. Master of Science in Nursing/Family Nursing Practitioner program
    - iii. Bachelor of Science in Information Science
    - iv. We also plan to grow the College's Master of Education degree by adding two new concentrations – library media and special education – which will be offered beginning in fall 2025.
    - v. Master of Science in Criminal Justice  
(Programs are also listed on "Degree program tab" of Attached Excel spreadsheet, as instructed)
  - b. While implementing new programs, the College will continue to connect its students with regional organizations and businesses before graduation through experiential learning (which includes a collaboration with VTOP) to further invest talent in the long-term enhancement of our region.
  - c. The College's actual increases in enrollment have taken campus housing beyond our current capacity, so UVA Wise is currently partnering with Land Star to expand housing not only for our students but for the region as well, the need for which was shown at a recent housing symposium held by regional business leaders.
  - d. Similarly, new academic facilities will be needed to expand programming further as new programs are added and enrollment continues to rise (see Capital Request).
2. **Further enhance student experience to increase retention and graduation rates.** UVA Wise has been devoting itself to the success of our graduates for decades, but several new goals will assist students not only in graduating but in being more fully equipped for the workforce. To accomplish this:
  - a. We have introduced an experiential learning requirement to our general education curriculum that requires all students to graduate with an internship, undergraduate research, community engagement, or similar hands-on experience that will enhance their job readiness.
  - b. UVA Wise established an Academic Success Center with a dedicated staff to facilitate an early alert system, coordinate support services and monitor progress. This Center has expanded tutoring options, particularly providing online tutoring for many subjects in addition to face-to-face offerings.
  - c. The innovate2elevate program, which provides an iPad, keyboard and Apple pencil, has also been instrumental in keeping students connected and textbook costs low.
  - d. Taking Care of Business Day allows students to pause for a day so that students can take care of any holds on their accounts due to bookstore charges, parking tickets, etc. so that they can be prepared to register for their next semester of classes.

- e. A Chancellor's Fund for Success rounds out the offerings, providing financial assistance to students who need a vital lift to remain engaged and complete their degree.
  - f. The College will guide its enhancements in this area around data and, in addition to helpful fact pack information, we have noted that, as of June 20, the average fall-to-fall retention rate for the last three freshman cohorts was 74% and 73% for the last three transfer cohorts, representing a significant improvement from the 59% and 62% rates, respectively, experienced during the COVID pandemic.
3. **Keep college affordable.** UVA Wise was the only college to keep tuition flat during the past two fiscal years thanks to legislative investments that are now returning on investment. While we are seeking additional funding to ensure continued affordable access, we are also stewarding investments by:
- a. Utilizing multiple shared systems through our collaborations with the University (see D5 for more detail); and
  - b. Partnering with UVA on their grand challenges research initiative which has empowered our faculty and students to undertake research that not only builds their capabilities but serves regional needs. UVA Wise is focusing on two specific research areas in conjunction with our colleagues in Charlottesville (The Brain and Neuroscience and Environmental Resiliency) while also providing support in all academic disciplines through the Wise Invests in Scholarly Enhancement grant program.
  - c. The College also negotiated a contract to reduce costs of the innovate2elevate initiative (provides each student with an iPad, smart keyboard and Apple pencil) by partnering with T Mobile.
4. **Continue to build innovative ways to serve students.** UVA Wise has bridged the technology gap not only by creating an initiative to provide an iPad, smart keyboard and Apple pencil to each student, but by twice earning Apple Distinguished School honors for doing so. Similarly, we partnered with Niche on their direct admission beta program and CollegeVine to use AI recruiter technology, which assisted us with managing our growth in applications from 1,000 to 5,000 applications per year while operating within the same budget constraints. To continue this work we are:
- a. Transitioning our iPad program from Wi-Fi to a cellular connection.
  - b. Launching an AI advisor this fall to increase student engagement and satisfaction.
  - c. Piloting direct admissions with the Common App.

With the 2022-24 investment made by the Commonwealth, the College has grown enrollment, especially in programs key to employers. Now, we seek additional affordable access funding to maintain flat tuition or minimal tuition increases. The College's General Fund requests are on the attached spreadsheet as are projections regarding tuition increases that include our strategies to manage tuition through Commonwealth investment. Requests include:

- **General Operations Support:**
  - Tuition Moderation: Requests the continuation of one-time state funding allocated in FY25 for use in the 2025-26 academic year to help limit tuition and fee increases for in-state undergraduate students. As this funding was one-time in nature, UVA Wise seeks to have it incorporated into base funding for the 2026-2028 biennium budget to ensure continued affordability for Virginia students.

- Affordable Access: UVA Wise is requesting additional funding to keep tuition and fee increases low for students and families. Because of inflationary pressures in goods and services (to include healthcare) and partially funded compensation increases. These funds would help subsidize the need for raising tuition and fees. This is funding needed in addition to the general fund request for continuation of one-time state funding for Funding Tuition Moderation Support.
- **Financial Aid:**
  - In-state Undergraduate: Requests the continuation of one-time state funding provided in FY25 for use in the 2025-26 academic year for in-state need-based undergraduate financial aid. As the funding was one-time in nature, UVA Wise seeks to have it incorporated into its base funding in the 2026-2028 biennium budget to ensure sustained support for financially vulnerable students.
  - VMSDEP: The College requests increased state support for the significant growth in state mandated VMSDEP tuition waivers at UVA Wise.
- **Enrollment Management and Marketing:** UVA Wise is requesting funding to support enrollment management marketing, increase the use of technology in the recruitment and admission of students, expand student support services through wellness activities, increase student retention through academic support technology and increased programming.
- **Education Innovation/Online Learning:** UVA Wise is requesting additional funding to expand the M.Ed. Program to include Library Media and Special Education program, as well as the implementation of the data analytics program to include artificial intelligence integration.
- **Research:** UVA Wise is requesting funding to further support research opportunities at the College. The College is seeking to hire a director and support staff to assist in planning while also focusing on applied research collaboration with the University of Virginia to develop knowledge, expertise, and experiential learning opportunities for students in areas of study important to our region. This will provide additional support to Healthy Appalachia Institute, which will implement population health programs in collaboration with regional community, business, health, and education partners, as well as teach public health courses at the College.

**A4. Please explain how your institution has engaged your Board of Visitors and institution leadership in the mandatory review of the Pell Initiative for Virginia.**

UVA Wise has regularly engaged institutional leadership in the review of the Pell Initiative for Virginia (PIV) through our regular reports to SCHEV detailing the progress we have made on our PIV grant. We currently have awards for “Round 1” and “Round 2,” both of which extend through June 2027. Reporting details are available in Appendix A. When our new Executive Director for Student Success and Retention is on board in summer 2025, we will begin the process of applying for the next round of funding.

Our current PIV initiatives are overseen by the Director of Undergraduate Studies who meets regularly with the Provost to assess our work to date and plan for future progress. The Provost updates the Chancellor and the Senior Leadership team at regular meetings.

UVA Wise engages the Board of Visitors of the University of Virginia in the review of the Pell Initiative for Virginia primarily during regular reports for scheduled BOV meetings detailing enrollment, retention, and graduation statistics for the College at Wise.

## 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? Further, describe your 2023 enrollment projections and explain why those projections have (or have not) resulted as projected. Please reference any specific academic programs that have had a significant (positive or negative) effect on enrollment, if relevant. When responding to this question please consider data under the “Enrollment” section of your institution’s fact pack [\(linked here\)](#).**

### Drivers of Enrollment

UVA Wise has implemented strategies which have not only increased enrollment but assisted its students with attending a higher education institution at which they can earn a college degree without burdensome debt. Strategies employed:

- Doubled the income threshold for our Within Reach program, which now provides Virginia families who earn \$80,000 or less with tuition and fees for their students (the threshold was previously \$40,000).
- Removed the application fee and enrollment deposit after determining they were simply barriers to enrollment for low-income students and families.
- Invested in integrated marketing that raises the awareness of the College's academic offerings, campus life and affordability specifically to interested college-bound students.
- Partnered with Niche for direct admission, first as a beta partner during the program's development.
- Added new programs including a Master of Education, a hospitality and tourism major, and expanded our existing programs, particularly nursing which is a critical need in rural Virginia (citation needed). This was largely thanks to investment from the Commonwealth.

### Past Projections

Our actual enrollment substantially outperformed projections in both years, particularly in Fall 2024 where we exceeded total enrollment projections by nearly 500 students. While first-time freshman enrollment was slightly below projection in Fall 2024, this was more than offset by strong performance in transfer students and overall degree-seeking enrollment. The significant increase in non-degree seeking students from 717 in Fall 2023 to 985 in Fall 2024 can be attributed to expanded program offerings and enhanced community engagement initiatives led by the college's new director of the Center for Teaching Excellence. This track record of exceeding projections, combined with our current early indicators showing 5% growth over last year, reinforces our confidence in the conservative 2025-2029 projections.

	Fall 2023 Projection	Fall 2023 Actual	Fall 2024 Projection	Fall 2024 Actual
First-time Freshman	300	315	309	283
First-time Transfers	100	110	106	108
Degree-Seeking In-state Students	842	966	843	1036
Degree-Seeking Out-of-State Students	249	239	249	259
Total Degree-Seeking Students	1092	1205	1092	1295
Non-Degree Seeking In-State Students	682	635	682	964
Non-Degree Seeking Out-of-State Students	18	82	18	21
Total Non-Degree Seeking Students	700	717	700	985
Total In-State Students	1525	1601	1525	2000
Total Out-of-State Students	267	321	267	280

Total Fall Enrollment	1792	1922	1792	2280
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**General Fund Request**

To continue to grow enrollment and retention while continuing affordable access, our attached General Fund Request includes several needed budget items, including enrollment and retention dollars aimed directly at attracting more students, retaining and graduating those students, and keeping costs low to students.

**B2. Please summarize your institution's enrollment management strategy to align with recent demographic and enrollment trends. Consider online education enrollment in your response. What is the level of confidence in your 2025 enrollment projections, considering potential risks and unknowns such as economic factors, shifting student preferences, and regional demographic changes? 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 Management Strategy**

For more than a decade, UVA Wise has been working strategically to buck the national trends of declining enrollment for small, rural colleges. We've created numerous initiatives to enhance student educational opportunities and outcomes through enrollment growth, and it's gratifying to see they are resulting in increased enrollment (fact pack "enrollment trends" chart A).

The College regularly monitors enrollment trends through a variety of sources, not limited to but including:

- National Student Clearinghouse Research Center (NSCRC)
- Western Interstate Commission for Higher Education (WICHE)
- National Center for Education Statistics (NCES)
- Numerous SCHEV reports accessible at: <https://www.schev.edu/research-publications/reports-and-publications>
- As an admitted cohort nears their first day of classes, we also monitor day-to-day indicators including housing registration, completion of orientation modules, textbook acquisition, etc.

### **Past strategies (still being utilized) include:**

- In 2018, the College worked with the Virginia General Assembly to establish a reduced tuition rate for residents of the Appalachian Regional Commission, which encompasses 423 counties across 13 states and stretches from New York to Mississippi.
- In 2022-24, a General Assembly investment provided the impetus needed to grow UVA Wise the two following years. With that investment, the College developed new academic programs to diversify student career pathways and increase regional job creation. The programs included those listed in question B1 as well as an online business major.
  - During this period of growth, the College also increased enrollment in their online RN to BSN program thanks to enhanced outreach to healthcare facilities and community colleges as well as increased marketing.
  - Bachelor's completion programs with online majors were also added in business, and teacher education. Planning is underway to add a degree completion program in criminal justice as well. Each of these programs is (or will be) a "2 + 2" initiative targeting Virginia residents who have an associate's degree and who would like to add a bachelor's credential.
- UVA Wise has signed agreements with Virginia Highlands Community College to assist with bachelor's degree attainment in critical technology fields and partnered with Mountain Empire Community College on a SCHEV grant to facilitate bachelor's degree completion.
- See removal of application and deposit fees in question B1 as well as expansion of our Within Reach program.
- Furthermore, the College introduced the Little Cavaliers Early Learning Center to provide childcare and, in so doing, enhance recruitment and retention of both employees and students.
- We also introduced a new track and field program, now in its second season.
- And, we held tuition flat for the past two years.

### **New Strategies for Enrollment:**

While the growth in enrollment at UVA Wise has been intentional (see list of past strategies below), it is important to note that we are still working to build new strategies as we monitor broader demographic trends. These include:

- Partnering on direct admissions with CommonApp.
- Building off the success of private investments in campus facilities and beautification that have contributed to students' engagement and wellbeing (such as an outdoor intramural court, a lactation station for new mothers, and an academic success center in the College's library) and expanding housing offerings through a partnership with Land Star, as our student population is exceeding the existing housing capacity for our campus and region.

We've also bolstered enrollment in some less conventional ways:

- Although it does not provide traditional undergraduate students, the College's Center for Teaching Excellence, which provides teacher licensures for Virginia teachers, is designed to be highly competitive in creating and retaining teachers for the Commonwealth.
- The College has embraced the opportunity of becoming a destination location. For example, we have invested private dollars into turfing our baseball and softball fields which has led not only to more, earlier home games in the season but also additional regional economic revenue and exposure by K-12 teams who now are able to use these facilities.
- Similarly, UVA Wise leaders have worked to ensure our David J. Prior Convocation Center, which recently hosted its one millionth visitor, is a regional education hub hosting not only Day in STEM but also our K-12 STREAM outreach initiatives as well as regional and state athletic tournaments.
- UVA Wise's enrollment growth strategies have been curated not solely to increase the College's stability and bolster our revenues, but as a systemic evolution to help students progress through the process of their higher education more seamlessly.
- And we've made sure those enrolled can succeed and push through barriers. "Taking Care of Business Day" allows students to pause for a day so that students can take care of any holds on their accounts due to bookstore charges, parking tickets, etc. so that they can be prepared to register for their next semester of classes.

### **Enrollment Projections**

Currently, UVA Wise enrollment projections show steady, controlled growth with total headcount increasing from 2,239 to 2,266 students over the six-year period. In response to the State Council's request, the College has submitted revised projections that include low, medium, and high enrollment ranges. The low range projects Fall enrollment growth from 2,130 to 2,161 students, the medium range (representing our primary targets) from 2,239 to 2,266 students, and the high range from 2,345 to 2,376 students over the projection **period**. We feel confident in these projections because they are built on validated retention rates of 70% for first-time freshman and 72% for transfers, which are consistently applied throughout the projection period and reflect documented student persistence patterns from recent years.

The model incorporates realistic new student recruitment growth of 2% annually for freshman and 3% for transfers, along with established graduation patterns and class progression rates observed in historical data from 2021-2024. The projections maintain the institution's traditional enrollment characteristics and demonstrate mathematical consistency between recruitment, retention, and graduation effects, providing confidence that these targets

represent achievable and sustainable enrollment growth aligned with the College's capacity and strategic goals. As of June 20, Fall 2025 full-time enrollment was running 5% ahead of last year's at the same point in time and 25% ahead of Fall 2021's at the same point in time. The number of full-time degree seeking students was also running 5% over last year's. As we continue this growth, we will add additional programs that will meet employer needs. In our experience, this not only creates financial stability/revenue for the College itself but benefits the businesses and employers in our region.

Again, additional Commonwealth investment as proposed in the General Fund requests will assist UVA Wise in not only meeting these enrollment targets but maintaining no to low tuition increases.

**B3. 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).**

With two consecutive years of enrollment growth (and an anticipated increase again this fall), retention rates increasing, and housing at 100% occupancy, net tuition revenue at UVA Wise has increased more than 10% each of the previous two years.

Commonwealth investments were essential to keeping costs low for students:

- Additional financial aid awarded through the Commonwealth including additional affordable access dollars and operational funding, has allowed the College to hold tuition and fees flat for two years.
- Funding for the VMSDEP was essential.
- Commonwealth dollars for compensation increases have also been critical to maintaining low tuition increases.

This means UVA Wise students are taking out less in student loans (fact pack, “debt relative to earnings” chart D).

In order to keep college affordable for students and steward Commonwealth investments, we are:

- Requesting the enrollment and marketing funds as shown on General Fund Requests Spreadsheets.
- Continuing to grow our endowment, much of which is dedicated toward academic scholarships. Endowment disbursements allow UVA Wise to award more than \$5 million annually in scholarships to students.

Expenses per student have increased since the 2022 general fund investment to implement new academic programs and master’s degrees, enhance enrollment and recruiting strategies, as well as support programs for students. As enrollment continues to rise, the cost per student will continue to decrease.

## 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 or credential 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 and how you are aiming to meet those targets (e.g., X% 6-year graduation rate for Pell students by 2030). Also include information on recent changes in completion outcomes. When responding please reference the “Completion” section of your institution’s fact pack data ([linked here](#)).**

#### *Highest-priority completion targets*

Student success, partly measured by first-to-second year retention rates and by graduation rates, is a priority for UVA Wise for the upcoming six-year period. We are pleased that our retention rates have remained consistently in the lower 70% range for the past several years (Fact Pack, Completion, Chart D), and we intend to build on this stability. We intend to improve our statistics in these areas by:

- Focusing on the first-year experience with our upcoming SACSCOC Quality Enhancement Plan, beginning in fall 2026.
- Revising our first-year seminar course and increasing it from 1 credit hour to 3 credit hours.
- Enhancing staffing levels in our Academic Success Center; a new Intervention Specialist begins in August 2025.
- Continuing our work with the SCHEV PIV grant.
- Hiring an Executive Director for Student Success and Retention; this is a new position created with repurposed dollars, and the inaugural hire will begin in June or July 2025.

Below are the highest-priority completion outcome targets for UVA Wise:

#### Realistic Expectations:

- Maintain first-to-second year overall retention in the 72%-74% range.
- Maintain retention rates for Black students at or near the rate for White students.
- Maintain retention rates for lower-income students at or near 70%.
- Increase overall 6-year graduation rate to 52%.
- Increase lower-income student graduation rate to 45%.

#### Aspirational Goals:

- 80% first-to-second year retention rate for all students by 2031
- 77% first-to-second year retention rate for lower income students by 2031
- 80% first-to-second year retention rate for students of color by 2031
- 60% overall 6-year graduation rate by 2031

Certain cohorts retain higher than other students and the practices used to support those students are now being applied to all. One example is athletes. Of the fall 2022 athletic cohort, 84% were retained for Fall 2023.

#### **General Fund Request**

To continue to improve program performance while continuing affordable access, our attached General Fund Request includes several needed budget items, including dollars aimed directly at retaining and graduating the increased number of students we're attracting while keeping costs low for students. Additional portions of our request which are dedicated to education innovation/online learning and research, are also designed to expand programming in industry-aligned fields and providing students with the experience to enter the workforce primed for success.

**C2. Please describe efforts at your institution to ensure all students are graduating in a timely manner. Reference data from the “Program Alignment and Performance” section of your fact pack ([linked here](#)).**

Improving retention and graduation rates is a priority at UVA Wise. We are pleased that our undergraduate retention rate has stabilized at around 72%-73% in the last few years; this is a significant improvement since the years immediately following COVID, but we believe we have room for continued improvement in this area.

Although our 6-year graduation rate, which has remained persistently around 50%, is in line with what we see at other similar institutions both in the Commonwealth and beyond, we are focused on improving that number in the coming years. Doing so will improve our results in other areas covered in the data SCHEV tracks, including wage, upward mobility, and employment figures. Initiatives aimed at improving retention and graduation rates include:

- Expansion of the “Within Reach” promise program to guarantee that students coming from families who make \$80,000 or less per year (as determined by FAFSA) will be granted the full cost of tuition and fees. Financial stress is one of the primary reasons students do not persist to graduation, and this program can help alleviate that concern for many UVA Wise students.
- Creation of a new position, “Executive Director for Student Success and Retention,” to begin summer 2025. This full-time position will oversee the College’s current retention and graduation initiatives, including the Academic Success Center, and will develop new strategies to address these areas. The Executive Director will report directly to the Provost.
- Addition of an Intervention Specialist to the Academic Success Center. This hire will work directly with students identified as needing academic assistance, guidance, or remediation. In addition to financial struggles, many UVA Wise students enter college less prepared for the academic rigor of higher education than students at more selective institutions. Early intervention can help these students persist.
- Addition of a counselor to the Counseling Center. We know that in addition to financial stress and academic struggles, mental health issues are a common reason for students to abandon higher education. Like all institutions, UVA Wise has documented an increased need for counseling services over the last decade, and we are working to meet that need.
- Commitment to a Quality Enhancement Plan (QEP) for SACSCOC focused on the first-year experience and the transition to college. We are expanding our existing first-year seminar from a 1-credit hour course to a 3-credit hour course as part of our QEP. This more robust seminar will aid students in the transition to college; introduce students to campus services including career services; provide enhanced instruction in time management, study skills, and financial literacy; and will help students forge earlier and deeper connections to an advisor (who will be the seminar instructor) and the campus community.

- Enhancement of our advising processes. Students will now work with a “Cavs Corps” advisor during their first summer transition to UVA Wise and will then work with their first-year seminar instructor as the advisor during their first year on campus. When the student is ready to declare a major, they will transition to a permanent academic advisor. We are also implementing an AI advisor program through College Vine. This tool will provide students with 24/7 access to information about the College Catalog, academic requirements, campus services, etc.
- Continued development of the “Wise Journeys Toolkit.” The toolkit is a feature embedded in all students’ iPads, which they receive as part of innovate2elevate program. The toolkit helps students map out their journey at UVA Wise from a student in the First-Year Seminar program through graduation and beyond.
- Formation of a “Credit Hour Taskforce” (fall 2025) that will make recommendations to the Provost on how to ensure that students can complete all degrees at UVA Wise in a reasonable amount of time and in keeping with the mission of a liberal arts college.

## POST-COMPLETION OUTCOMES

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

**C3. 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 does 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. When responding please reference the “Post Completion” section of your institution’s fact pack data [\(linked here\)](#).**

UVA Wise monitors post-completion outcomes by tracking employment rates, rates of attendance at graduate/professional schools, wages, upward mobility, and debt load. We also carefully monitor the breakdown of graduates by industry, tracking UVA Wise's contributions to high-growth occupations (as listed in Fact Pack as well as Appendix C, which includes our recent post-graduate data). Data collection and analysis efforts are a cross-campus collaboration and include:

- Office of Career Discovery and Planning tracks first destination of UVA Wise graduates according to the protocol and standards set by the National Association of College and Employers (NACE) by:
  - Conducting an outcomes survey which includes questions regarding experiential learning opportunities as well as plans for employment and/or graduate school.
  - Retrieving information from GivePulse, a new software platform tracking community engagement, and HandShake, a platform connecting students with employment and internship opportunities.
  - Importing data from the National Student Clearinghouse (NCS) and data mining social media.
  - The Office then compares and contrasts UVA Wise student outcomes with the data provided by the [NACE dashboard](#) for first destination outcomes. Key metrics include: Gender, Ethnicity, Region, Public/Private, Carnegie Classification, School Size, and Academic Program as it relates to degree program, career outcomes rate, knowledge rate, and salary information.
  - See Appendix C for further detail.
- Academic departments also track graduates through personal connections and social media outlets.

As previously mentioned, UVA Wise has been working hard for nearly a decade to buck the trends of enrollment and, at the same time, the College has been focusing on how our contributions of talent to our region and the Commonwealth fill vital needs in high-growth industries and occupations. A summary of our institution's greatest strengths and areas for improvement with respect to post-completion outcomes follows.

- Areas of strength include:
  - Additional wages for UVA Wise graduates compared to high school graduates (Fact Pack, Post-completion, Chart A)
  - Low and decreasing levels of debt for UVA Wise graduates (Fact Pack, Post-completion, Chart D)
  - Decreasing "debt to wage" ratio for graduates (Fact Pack, Post-completion, Chart D)
  - Consistent growth in median wages of UVA Wise graduates (Fact Pack, Post-completion, Chart C)
  - Sharp increase in the percentage of lower-income graduates who achieve upward mobility in Virginia (Fact Pack, Post-completion, Chart C)

- o Consistent percentage of graduates entering VEDP-designated high-priority tradable industries (Fact Pack, Workforce Alignment, Chart C). In fact the need for occupations is a key facet of targeting which programs will be developed.
- Areas for improvement include:
  - o Percentage of out-of-state graduates remaining in Virginia (Fact Pack, Workforce Alignment, Chart A). Our proximity to Kentucky, Tennessee, North Carolina, and West Virginia presents some natural obstacles here as our closest urban hubs lie just outside of the Commonwealth.
  - o Average salaries of UVA Wise graduates, which is partly due to our rural location and to the fact that we do not offer engineering, medical degrees, etc.

**C4. 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, work-based learning) during their time at your institution? How will you draw on successes/challenges from prior initiatives? Please describe how you intend to use existing/provided resources to execute the strategies.**

UVA Wise prepares students with the tools they need to engage meaningfully in the world of work and become leaders of their communities. To ensure the former, UVA Wise embeds “career readiness” throughout the curriculum and co-curricular experiences so that upon graduation students will have, as one of the College’s goals states, “the ability, confidence and initiative to use their undergraduate educational experience as a springboard for greater accomplishment.”

On the curricular side, UVA Wise has multiple strategies to ensure career readiness and job placement. These include:

- Required internship or practicum experiences for students majoring in certain professionally oriented programs including nursing, teacher education, exercise science, health and wellness, and hospitality and tourism management.
- Encouragement of and support for internship or practicum experiences for all UVA Wise students. A new graduation requirement (as of fall 2024) that all UVA Wise students complete at least one experiential learning (EL) activity. This initiative is called “Beyond Wise.” Many students will satisfy this requirement with an option (including an internship or service experience) that enhances career readiness and job preparation.
- UVA Wise is planning to change the required First-Year Seminar course for all new students from one credit hour to three. This change will allow instructors and students to focus not just on the transition to college but also on where the college journey will lead each student, including into the world of work.
- The new First-Year Seminar course will provide the foundation for the continued implementation of Beyond Wise, as it will introduce students to the College’s Experiential Learning Hub, the structure put in place to oversee the new experiential learning graduation requirement. Highlights of the Hub’s responsibilities include:
  - o Consistently administer experiential learning opportunities. The Hub is comprised of the Office of Career Discovery and Planning, Wise Connects (Community Engagement), International Studies, Undergraduate Research, and the Office of National Awards and Fellowships. This hub is coordinated through the Office of Academic Affairs.
  - o Tracking experiential learning across the entire institution via technology.
  - o Establish and maintain an evaluation toolbox for experiential learning programs.
  - o Provide an annual, month-long experiential learning series for students enrolled in the First-Year Seminar.
  - o In students’ first year, they are introduced to the Beyond Wise framework and equipped with the tools to build a successful experiential learning plan. Students receive a robust iPad e-portfolio template that encourages them to reflect on how to incorporate high-impact activities into the college experience and gives them a tool to collect artifacts for each experience and build their resume.
  - o In sophomore through senior years, the institution provides resources and advisors to guide and support students in the selection of experiential learning projects, connect them to program mentors, and help them explore funding resources for unpaid activities. Students submit their EL activity, a reflection, to a workflow that is managed by the EL Hub’s director.

On the co-curricular side, UVA Wise is equally active in preparing students for a productive professional life after college. Since FY24, the College has leveraged four out of five VTOP grants offered through SCHEV with the purpose of increasing work-based learning opportunities and work-ready skills for UVA Wise students. Preparation is underway to submit a proposal for a scaling grant to continue this work and further enhance support provided to UVA Wise students.

Through SCHEV funded initiatives, UVA Wise has:

- o Transformed Federal Work Study jobs to internships by engaging representative supervisors from eight departments within the College and leveraging their current student positions. The College plans to continue expanding this effort to engage additional supervisors across campus.
- o Embedded career readiness and internship toolkit VTOP modules and additional career content into our students' learning curriculum through Canvas and introduced these assets in the required First-Year Seminar.
- o Implemented Handshake and GivePulse as technology solutions to facilitate connections between students, employers, and work-based learning opportunities. Both also serve as a mechanism to track work-based learning across majors.
- o Designed and launched the region's first internship summit bringing together employers and students in a central location for professional development and networking. The second event is planned for fall 2025 and will be held on the UVA Wise campus.
- o Engaged alumni to serve as career mentors.
- o Leveraged UVA Wise's location in Central Appalachia by continuing to engage with the Interstate Career Council (ICC) which is comprised of higher education career service professionals from eastern Kentucky, northeastern Tennessee, southwestern Virginia and southern West Virginia.
- o Created new opportunities for work-based learning by:
  - joining the Shepherd Higher Education Consortium on Poverty, which removes barriers for UVA Wise students to participate in work-based learning opportunities.
  - launching the Parker Dewey micro-internship program to small businesses in the Town of Wise and to on-campus supervisors. This program offers paid ten-hour project-based learning opportunities to UVA Wise students.
  - awarding internship support scholarships for students expressing need for housing, transportation, meals, and professional clothing.

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

**C5. For which specific workforce needs is your institution best positioned to supply talent, based on regional, industry, or occupation alignment? When responding please reference the "Workforce Alignment" section of your institution's fact pack data ([linked here](#)).**

UVA Wise is well positioned to supply talent to many areas, particularly the following based on alignment with regional needs and opportunities:

- Business Operations Specialists: Our Business and Economics department is one of the largest on campus, based on student enrollment. We are producing graduates in areas such as accounting, management, marketing, and business administration who are finding employment in the regional economy. We are also expanding opportunities for students in entrepreneurship, data analytics, hospitality and tourism management. From 2023-2025, an average of 12% of the graduates who responded to our employment survey were in the business sector.
  - Thanks to developing coursework for our certificate and future programs, we are already offering students courses and training in data analytics which perfectly complement the growth of industry in our region.
- Healthcare Practitioners (Nursing): UVA Wise graduates earn professional degrees in medicine, pharmacy, and other healthcare fields. Additionally, our nursing programs are some of the largest and fastest growing on campus. Our 4-year, on-campus program leading to the Bachelor of Science in Nursing (BSN) produces an average of 24 graduates per year, and our RN-to-BSN program has grown from single digit enrollments prior to 2022 to more than 40 today. We are also working through SCHEV to secure approval for a Master of Science in Nursing program which we hope to launch by fall 2026. From 2023-2025, an average of 25% of the graduates who responded to our employment survey were in the healthcare sector.
- Preschool, Elementary, Middle, Secondary, and Special Education Teachers: Graduates of UVA Wise comprise the majority of public-school teachers in Wise County. Enrollment in our education programs has historically been strong, and it is currently growing. With the addition of our new master's degree, our new associates to bachelor's program, and our ongoing work with the Center for Teaching Excellence to provide licensure and professional development support for teachers throughout the Commonwealth, UVA Wise is an important resource for education in the state of Virginia. From 2023-2025, an average of 29% of the graduates who responded to our employment survey have gone into the education field.
- Computer Occupations: UVA Wise's ABET-accredited computer science program offers degrees in computer science, software engineering, and management information systems. From 2023-2025, an average of 11% of the graduates who responded to our employment survey were in the computer occupations field.
- Amusement, Gambling, and Recreational Industries: UVA Wise offers majors in two areas related to this category: hospitality and tourism management as well as sport management. Both majors are seeing increased enrollment. Hospitality students have access to experiential learning opportunities at the recently opened Hard Rock casino in Bristol as well as at other regional assets.

- Grantmaking, Civic, Professional, and Similar Organizations: As the only public 4-year college in the area, UVA Wise produces graduates who become the region's professional workforce.
- Community and Social Service Specialists: UVA Wise attracts many students who are interested in giving back to the community. To meet this demand, we have strong programs in psychology, criminal justice, sociology, history, and Appalachians studies. From 2023-2025, an average of 7% of the graduates who responded to our employment survey were in the counseling/social services field.
- Entrepreneurship: The Department of Business and Economics offers a minor program in Entrepreneurship. Interest in the program is growing, and students have experiential opportunities in conjunction with UVA Wise's Office of Community and Economic Development (including dedicated space in the Town of Wise and an annual "pitch" competition). Entrepreneurship will be a key driver for both talent retention and economic growth in Southwest Virginia.

**C6. Explain any additional initiatives or partnerships the institution is currently involved in to improve workforce alignment of academic programs.**

As an anchor institution in Southwest Virginia and a major source of talent for employers, UVA Wise is engaged in nearly every major initiative across the region. By remaining engaged, the College is better positioned to anticipate the skills, knowledge and aptitudes needed by our students to help drive the region's economy now and in the future.

Additionally, the College provides leadership across a multitude of regional initiatives, including:

- GO Virginia Region One, a statewide initiative focused on fostering private-sector growth and job creation;
- Virginia Talent + Opportunity Partnership (VTOP), which connects employers with students through work-based learning opportunities and internships;
- Opportunity SWVA, a network of entrepreneurship support organizations; and
- Healthy Appalachia, the only public health institute in Southwest Virginia.

UVA Wise also hosts the annual Southwest Virginia Economic Forum that draws a diverse array of participants from business, industry, government, civic, health care, education and engaged citizens. UVA Wise team members serve in many capacities such as members of chamber of commerce boards, town councils, economic development authorities, and civic organizations contributing to the success of our communities.

In January 2025, UVA Wise became a backbone partner to [STRONG ACC](#), an independent, regional, multi-sector coalition made up of 400+ partner organizations serving Southwest Virginia and Northeast Tennessee. The collective impact organization focuses on early childhood development, educational success, workforce development, and economic mobility.

UVA Wise has also initiated several partnerships that positively impact workforce needs, including:

- Center for Teaching Excellence (CTE), as mentioned in B2, supports teacher education statewide; and
- Agreements with multiple community colleges (MECC, SWCC, etc as mentioned in B2).

## 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. When responding please reference the “Financial Effectiveness & Sustainability: Affordability” and “Financial Health” section of your institution’s fact pack data [\(linked here\)](#).**

As previously mentioned, UVA Wise has taken several steps to ensure affordability for our students, the positive impacts of which can be seen in the fact pack, particularly in the reduced borrowing amount per student (fact pack "how much debt" chart D). Measures include:

- Eliminated application fees for all domestic students
- Eliminated enrollment deposit for all students
- Expanded the Within Reach program, which now covers tuition and fees for those Virginia students whose family's income is \$80,000 or less (previously families \$40,000 or less)
- Tuition and Fees have been held flat for the last two years
- Room and Board increases have been held below HEPI inflation rates in recent years
- Revised the Liberal Arts Core to move students towards graduation in a more timely manner.

The College is also:

- Growing our endowment, particularly our student scholarship funds, which distribute more than \$5 million in scholarships annually to our students.
- Requesting additional funds in our general fund request attached to maintain low tuition.
- Intentionally increasing not only our enrollment but our occupancy in residence halls, which provides revenue and financial health. (This active, bustling atmosphere in turn has helped attract additional students.)
- Increasing year over year enrollment of Pell-eligible students, which indicates that Pell-eligible students feel the College is accessible.

### **General Fund Request**

To continue to increase enrollment and retention while continuing affordable access, our attached General Fund Request includes several needed budget items, including general operations support dollars. The College's request for financial aid is also essential to keeping cost low to students and covering expenses that provide for the upward mobility students achieve through UVA Wise as seen throughout the fact pack.

## **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? Further describe your institution's discounting by type and if this is sustainable in future years. Please reference the "Revenue" and "Financial Health" slides of your institution's fact pack ([linked here](#)).**

**Pricing Rationale:**

- Tuition & Fees have historically been based on the College's competition (both in-state and out-of-state) as well as students' ability to pay.
- UVA Wise has intentionally kept tuition and fees low compared to other agencies in the Commonwealth, but our regional out-of-state competitors continue to market tuition discounts to students in our recruitment areas.
- Room and Board charges are consistently at the average of all public institutions in the Commonwealth.
- Previous years' student aid trends for packaged students and enrollment performance are also monitored as data that informs tuition and fees.

**Financial Aid Strategy**

UVA Wise's aid strategy aims to leverage and maximize federal, state, and institutional aid with minimal to no discounts or waivers to students. As students confirm their attendance to the College, their FAFSA results assist UVA Wise financial aid officers in placing students into one of three groups:

1. High need (full Pell), for which our goal is to cover the full cost of attendance with merit and need based aid after utilizing Pell.
2. Medium need (Pell eligible), which we cover direct costs (tuition and fees) with merit and need-based aid.
3. Low/no need (no Pell), for which we provide as much merit scholarships as possible.

Fact pack data showing both our enrollment increases during the past few years and that students are borrowing less to fund their education indicates the success of these initiatives.

UVA Wise is also in the process of hiring a Director of Financial Aid to ensure student financial accessibility by helping the College maximize federal, state and institutional aid.

The College will of course continue to monitor affordability and implement new strategies, as feasible and possible, to keep our degree programs affordable to students, which is key to both our and the Commonwealth's missions and strategic plans. Federal funds (including Pell, Trio, etc) and Commonwealth investments are essential tools in our work to help keep tuition flat for students as costs rise.

**Key Indicators of Success from the Fact Pack:**

- Increase in students for the past two years ("enrollment trends" chart A)
- Less borrowing per student ("how much debt" chart B and "debt relative to earnings" chart D)
- Increased median wages for our graduates (fact pack "wages for largest programs" chart B)
- Upward mobility are trending up for our students (fact pack "economic mobility" chart C)

**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? Please reference the “Financial Health” slides of your institution’s fact pack ([linked here](#)).**

#### **Enrollment Impacts**

Enrollment is already increasing due to the College's affordable pricing model and our commitment to and strategies around financial aid. In addition to removing barriers such as application and deposit fees, UVA Wise has broadened our marketing, not only attracting interest in our quality academic programs and co-curricular experiences, but in the affordability of our high-quality education.

As our applications increased to approximately 4,000-5,000 per year for the past three years, the College has packaged thousands of students in a model that not only provides affordability but begins with a cover sheet of direct costs that clearly shows the low cost of a UVA Wise education to students and families.

#### **Further Opportunity**

The College has found in-state and ARC pricing as not only reasonable but helpful to our growth trajectory (both for the College and in bringing talent in from bordering states). However, our analyses show that out-of-state pricing is not as conducive to enrollment growth in non-ARC out-of-state regions, especially in markets that are new to the College. This is one possibility we are monitoring for future strategic opportunity.

#### **Building Future Revenue**

UVA Wise has maximized Federal, Commonwealth and private aid dollars to fund students' tuition and feeds while avoiding discounts and driving down student borrowing. Some of this success is due to the commitment of our staff to our latest advancement campaign, *Honor the Future*, which has greatly contributed to the private dollars available for scholarships. Endowment disbursements allow UVA Wise to award more than \$5 million annually in scholarships to students.

UVA Wise has also created innovative partnerships with Niche.com and now the Common App. Whether through these partnerships or through the College's own integrated marketing strategies, UVA Wise has consistently spread brand awareness of *both* our quality academic programs and quality and, at the same time, our commitment to affordability. The attached General Fund Request includes a request for investment in innovative enrollment and marketing tactics that are already increasing enrollment to the College and allowing students who come here to graduate more quickly and with less debt.

### **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 using the “Expenditures by Category” and “Financial Health” slides from your institution’s fact pack data [\(linked here\)](#).**

As reflected in the Fact Pack, the category with the most significant increase is Academic Instruction. The 2022-2024 investment of \$11 million by the Commonwealth in new general fund support was intended to add and expand undergraduate programming, as well as move UVA Wise to a master’s granting institution. This investment required the hiring of new faculty and academic support staff, as well as new academic support initiatives to ensure students were progressing to degree completion and graduation. To steward the investment, UVA Wise implemented its plan quickly and academic instruction program expenditures grew to 48% of the spend in 2023-2024 (fact pack “Which of the biggest expenditure categories...” chart A).

The same investment showed the most significant increase in personnel as well due to the growth and expansion of academic programs.

As anticipated by the Commonwealth during their investment, this strategy has resulted in increased enrollments.

**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. Include the costs with a general fund request in the Excel file in the “GF Request” tab. Please reference the “Fastest Growing Expenditures” and “Financial Health” tables in your institution’s fact pack data [\(linked here\)](#).**

UVA Wise has remained committed to managing costs and improving fiscal health for many years, including a 2021 Early Retirement Incentive Program realizing \$398,000 of savings. Current and future cost containment efforts include:

- Continued collaborations/shared services with the University of Virginia.
  - Migrated to the University's Microsoft 365 platform, cost avoidance of approximately \$400,000 had the College invested in its own platform.
  - Migrated to the University's emergency alert system, RAVE, resulting in \$5,000 cost savings to the College.
  - Utilize the University's finance and human resources ERP solution, Workday, avoiding a significant cost of implementation (> \$1M) and ongoing costs (≈ \$500,000 per year).
- Senior Leadership annually reviews expenditures and reallocates funding as necessary. They also regularly review vacant positions and reallocate to areas of greatest need.
  - For example, as seen in B2, UVA Wise continues to invest in retention strategies that have led to increased retention and larger graduating classes, meaning students are earning their degrees in a more timely manner.
- The College continues to grow programs, specifically master's degree programming, with the M.Ed. (UVA Wise's first master's degree) courses exceeding enrollment targets and bringing in some additional revenue.

The College's goal in implementing these strategies is to keep college offerings affordable and hold tuition flat. As such, the general fund request for the coming biennium includes enrollment and marketing funds, which are currently being piloted by the University on a short-term basis, to keep those expenses from hitting tuition. Similarly, see requests for continued support for VGAP/affordable access dollars, which are an essential part of packaging student aid, in D2 and J1.

It is worth noting that, in the fact pack, in "Which of the biggest expenditure categories are growing fastest?" more than 50% of expenses tie up to two service categories relating to academics in Chart A, including both general academic instruction and academic administration, personnel development, and course and curriculum development.

**D6. Please describe the data in your fact pack [\(linked here\)](#) under "Expenditures by Category" and "Personnel". Provide an overview of any challenges present and what your institution is doing to get ahead of any anticipated challenges.**

Fact Pack data for UVA Wise reflects the 2022-23 growth in expenditures and personnel which directly correlates with the first year of the Commonwealth's 2022-2024 biennial General Fund Increase for UVA Wise of \$11 million. Additional detail:

- This investment was to implement new undergraduate and graduate programs at the College, strategies to grow the enrollment, as well as implementation of support programs at the College to increase retention and timely graduation.
- UVA Wise has stewarded this investment and realized two years of enrollment growth, improvement in the 4-year graduation rate (fact pack "retention and graduation trends" chart A), and successfully implementing new undergraduate programs as well as the College's first master's degree.
- Challenges at UVA Wise are similar to those for all institutions as we continue to have statewide compensation increases in addition to inflationary demands on goods and services.

The college continues to look for efficiencies in operations, shared services with the University of Virginia, and annually reviews vacancies and other reallocations to get ahead of any anticipated challenges.

**An important consideration**

UVA Wise appreciated the Commonwealth's support of compensation increases so that the College can attract and retain the talent that has helped our students succeed; however, to complement mandated compensation increases, UVA Wise requests additional affordable access dollars to ensure there is no need to raise tuition to fund those directives.

**D7. Please discuss how statewide salary and health insurance premium increases impact your institution (please reference your institution's estimated cost impact from the salary and health insurance calculator file). Further describe any challenges or the ability to support the NGF portion of the statewide increases. If statewide salary and health insurance premium increases occur and you do not receive additional state support above the general fund share, please describe how you will manage the NGF portion of these increases.**

**Salary Increases:**

Over the last five years, the Commonwealth has provided agencies with compensation increases of more than 22%. UVA Wise must provide 46.2% of these increases due to the fund split required by the Commonwealth. This requires the College to find other sources, such as tuition, to cover the cost share. Affordable access dollars have aided the College in keeping tuition and fees as low as possible, with the College being able to hold tuition flat for our students during the last two years.

With the estimated costs provided in the calculator, the College will use this data to inform additional general fund requests to cover projected compensation increases. If the increases occur, and no additional general fund support is received, the College will continue to control spending and look for additional efficiencies to support our affordable access goals, as this is our standard practice, but leaders would be required to consider increasing tuition and fees placing an undesired burden on our students and their families.

**Health Insurance Increases:**

As a division of UVA, UVA Wise is provided with health insurance through the University. By agreement with the Commonwealth, UVA operates its own self-insured health plan, with the state providing a share of funding for health insurance based on the lesser of the UVA premium or the state's CovaCare premium. The current funding methodology of the state is not an accurate reflection of UVA's health insurance pool. Historically, the state has chosen to fund the lesser of UVA's share of cost or the state health insurance fund's growth. This methodology incorrectly assumes the actuarial values of the two separate health insurance pools are the same. In recent years, the state health insurance fund has been overfunded and saw little to no increases in state contributions. The University's health insurance plan has not been overfunded and has projected significant growth in costs for FY27 and FY28. The estimated cost increases in the state share of the projected increase in health insurance are \$10.6 million in FY2027 and \$14.6 million in FY2028. The impact of these projected increases without corresponding increases in state support means that UVA and UVA Wise will have to rely on other NGF sources such as tuition to support the increases.

The attached General Fund Requests from UVA Wise are designed to provide affordable access through financial aid programs and strategically needed operational strategies we've added in order to maintain and continue to grow the success of the College as well as ensuring our students have access to become the graduates to assist our region and the Commonwealth moving forward.

**D8. Using the information from the ProForma tab of the Excel file please describe any present funding concerns (if relevant) and how your institution plans to address any potential concerns.**

With the assumptions provided on compensation increases as well as healthcare considerations while assuming no new general fund dollars, UVA Wise has planned a modest 2.5% tuition and fee increase per year, and enrollment projections have been updated reflecting the anticipated growth. UVA Wise has not had a tuition and fee increase in the last two years due to the general fund investments made by the Commonwealth. The ProForma continues to tell this story.

To keep tuition and fees low, it will take continued investment to offset inflationary pressures and continue the strategies to advance UVA Wise as an economic engine for Southwest Virginia. Without additional general fund dollars in the upcoming biennial budget, UVA Wise would have to reconsider our growth strategies or consider higher increases in tuition and fees which impacts our affordability goals.

## SECTION E: ECONOMIC DEVELOPMENT ANNUAL REPORT

**E1. 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**

UVA Wise works diligently to partner for the success of our region to assist in ensuring students' educations assist them with career readiness and to help enhance the vibrancy and job market for students post-graduation.

Our most recent economic development report can be seen in Appendix D.

## SECTION F: FREEDOM OF EXPRESSION AND INQUIRY, FREE SPEECH, ACADEMIC FREEDOM AND DIVERSITY OF THOUGHT

**F1. Provide a copy of any policy or reports your institution has produced and provide information about annual training or orientation related to this topic.**

UVA Wise's Free Speech Policy Link ([Free Speech Policy | UVA Wise](#)) can be found on the homepage and every page of the [uvawise.edu](#) website.

In addition to providing the policy digitally, we work regularly to ensure our faculty, staff, and students are aware of our policy. Examples of our proactive work to ensure freedom of expression, speech and diversity of thought include:

- Beginning with our extended orientation program, Student Expedition, all incoming students have participated in a session titled "Being Wise," since 2022. This topic discussed a community of respect, civility, free expression, personal safety, and other related issues.
- Employees attend an Open Forum annually that, since 2022, has had time dedicated to reminding all of the centrality of the College's academic mission, which requires cultivating an environment that protects the open exchange of ideas and the freedom of individual expression.
- On a smaller scale, employee workshops have also been hosted with topics such as Difficult Discussions: Academic Integrity and the Honor System (spring 2025), Political Speech: Who can say what, when, and where (fall 2024), and Reporting Concerns and Crisis Management (fall 2023).
- Since 2016, campus-wide emails are sent annually that contain training information, proper use of Commonwealth technology, and the College's non-discrimination statement, which encourages all to be mindful of respect and civility within our community.
- Additionally, the Chancellor and members of the Senior Leadership Team actively attend student and/or employee meetings and/or events that represent a variety of diverse viewpoints to support the value of active thinking.

The College has also developed and updated internal guidance around:

- a. The College's Non-discrimination policy, which now covers political affiliation.
- b. [Use of College Facilities or Property](#) and Limits on Direct Solicitation and Advertising (Time, Place, Matter), updated on April 10, 2025.

## SECTION G: NEW SCHOOLS, SITES, AND MERGERS

**G1. 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.**

Not applicable.

## [OPTIONAL] SECTION H: RESEARCH

**H1. [OPTIONAL] Highlight any strategic research priorities, programs, or key areas of investment (e.g., hiring plans, critical research agendas, interdisciplinary centers, business partnerships, commercialization efforts) and IP dissemination and commercialization priorities you intend to pursue over the next 6 years that have not already been mentioned in this narrative. What are the anticipated benefits to your faculty attraction/retention strategy, student value proposition, and the economic competitiveness of the Commonwealth?**

As the only four-year public higher education institution in Virginia's Coalfields, UVA Wise has been conducting research studies that assist our students in gaining hands-on learning and provide our region with insights on its natural assets, arts and culture, businesses, social systems and more for decades. As we introduce new academic programs and more students partake in experiential learning, that capacity will grow and continue to benefit our communities as well as the Commonwealth.

The question sometimes arises whether the College is well positioned to serve as a valuable partner to other institutions conducting research in Appalachia. As such, in FY25, UVA Wise engaged Chmura Economics and Analytics to identify areas where the College's capabilities aligned with local asset and regional research needs, should the need to significantly grow capacity arise. Considering shifts in economic and population conditions, Chmura conducted an analysis to determine new and/or expanded research opportunities for UVA Wise. The study suggests that energy, health and behavioral sciences and sustainable climate resilience areas are poised for innovative development in the region, and that UVA Wise has the potential to help advance research activity in these areas, which could bring additional growth and prosperity to the region. However, the study also showed that significant investment would be required to build the capacity to pursue further research and bring new technologies, medical interventions, strategic partners and financial investments to Southwest Virginia.

This is one possibility we are monitoring for future strategic opportunity; see the attached report in Appendix E.

## [OPTIONAL] SECTION I: COLLABORATION

**I1. [OPTIONAL] Outline any existing or potential initiatives you have not already highlighted in this narrative that feature collaboration across public higher education institutions and the K-12 sector (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?**

UVA Wise participates in various initiatives that engage K-12, including:

- **Streamwise:** Introduced in 2023, STREAMWISE is a bold and innovative program is transforming how students' kindergarten through college experience science, technology, research, engineering, the arts and mathematics. STREAMWISE takes a comprehensive approach that adds Arts and Research (data science) to the traditional STEM model. Students don't just learn, they get to build, create, solve, and present. From classroom-based activities to high-energy campus visits, STREAMWISE connects community, curriculum and creativity. The initiative's heartbeat is simple, providing access and opportunity. It includes a kids' coding camp in July that spans multiple school districts.
- **Upward Bound:** Upward Bound at UVA Wise is a pre-college, academic support program designed to serve the citizens of Southwest Virginia by providing academic services, college preparation, and cultural enrichment to its participants through an academic year component and an annual residential summer program. The program enhances academic and motivational skills preparing students to enroll in post-secondary education and be successful in today's society.
- **Governor's School in STEM-H:** Helps K-12 students dive into hands-on science, exploring mountain trails and making memories that last. From river adventures to genetics labs, this camp helps students build the skills and curiosity that will shape the next generation of scientists.
- **Future Business Leaders of America:** UVA Wise hosts an FBLA competition annually and is connected to FBLA and key speakers through the Napoleon Hill Foundation, whose Keys to Success course at UVA Wise connects college and community.
- **College Advising Corps:** The College is part of UVA's College Advising Corps initiative which places advisors in high school settings to increase the number of low-income and first-generation high school students who enter and complete higher education.

## [OPTIONAL] SECTION J: STATE POLICY

**J1. [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.**

To ensure continued affordable access at UVA Wise and maintain efficiency, the College submits the follow policy change recommendations:

- **Auxiliary Indirect Cost Waiver:** UVA Wise is requesting a permanent reprieve from the recovery of indirect costs from auxiliary operations to educational and general programs. This recovery has been waived since the 2020-2022 biennial budget for UVA Wise, and has allowed the College to steady auxiliary operations at a time when revenues were down and expenditures were increasing, and as we secured vital student services and rebuilt the financial foundation of the College's auxiliaries through the growth forecast of the College. A permanent reprieve would allow the College to continue to keep costs to our students low while not impacting operations due to the long-standing waiver.
- **VMSDEP:** The College requests that the Commonwealth fully fund VMSDEP waivers, for which the estimated cost for FY26 is \$245,718.
- **Compensation Increases:** UVA Wise appreciates the Commonwealth's investment in the talent on our campus that works diligently and daily to support our students' educations. The College requests affordable access dollars (see attached General Fund request) partly to support the underfunded portions of the salary. The mandated cost share is 46.2% and requires the allocation of NGF resources to meet compensation requirements, impacting tuition and fees to students.
- **HEETF Funding:** Allow software purchases with HEETF funding in recognition of size/cost and integration of software solutions.
- **eVA Fees:** Rather than transaction fees charged to agencies, the College requests that the Commonwealth establish annual flat fee for the Commonwealth's e-procurement solution (eVA).

## [OPTIONAL] SECTION K: ADDITIONAL INFORMATION

K1. [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.

UVA Wise is an engaged, successful partner in educating students who are the talent and leaders of tomorrow's Commonwealth. We take a systems approach to enhancing not only our students' lives but partnering to improve the organizations that better our communities.

Over the past few years, UVA Wise has piloted innovative access programs that include affordability, technology, and career readiness. As we've done so, we've tested critical solutions to higher education challenges (like technology access) that have garnered positive national attention. While this is a win for the College and its students, this is also a win for the Commonwealth, who has been noted as a key partner in our success along the way. Together, we can still continue to innovate.

Because we share the value (and strategic goals) of keeping our affordability *as well as innovation* front and center, we are proposing the attached General Fund and Capital Requests to ensure continued affordable access to students as we continue to innovate for tomorrow's Virginian talent.

Not only will we monitor affordability and accessibility initiatives, which benefit our partners such as community colleges and other Virginia schools, but we will continue to research our economic and community impact in the Southwest Virginia region, hoping to continue to be a model for rural reinvigoration alongside our region. Commonwealth investment is appreciated and essential to this shared vision.

## APPENDICES

Appendix A: Pell Initiative for Virginia

Appendix B: Need for Nursing references

Appendix C: Post-Completion Outcomes Data

Appendix D: Economic Development Report FY25

Appendix E: A Research Feasibility Investigation

## Appendix A: Pell Initiative for Virginia

### Pell Initiative for Virginia Report:

***H1: Discuss efforts at your institution to identify administrative/cultural systemic barriers to enrolling economically challenged, first-generation and Pell eligible students. Include any institutional changes and indicate (i) whether the efforts described have been completed or planned and (ii) the date of implementation. This report must include the structure and calendar of the body that will be conducting this review. A discussion paper on this review was distributed by SCHEV in the summer of 2024.***

UVA Wise has earned (2) consecutive years of enrollment growth through the combine efforts of the Office of Enrollment Management and the broader UVA Wise community. As our enrollment has grown, our relative distribution of Pell-eligible students has remained robust and in keeping with our institutional mission of expanding access to higher education to students of the Appalachian Region and across the Commonwealth of Virginia. UVA Wise currently enrolls student from all but (2) congressional districts in the Commonwealth, highlighting the effectiveness of our new recruitment and admission campaigns.

In September 2024 the College announced a significant enhancement to the Within Reach Program. Within Reach, initiated in 2019, is a financial aid assistance program that provides full cost coverage of all tuition and fees for in-state students with demonstrated financial need. Beginning in Fall 2024, the family income threshold for the Within Reach Program was increased to \$80,000, double the previous \$40,000 limit.

Month	Action
October	IEC review of SCHEV PIV Report from proceeding year and develop annual review priorities for upcoming year
November-March	Data acquisition and analysis
April	Annual internal report preparation
May	Presentation of internal report to Chancellor and Senior Leadership Team
June-August	Revision of report incorporating feedback from Sr. Leadership Team, collect pre-census enrollment and performance statistics
September	Collect official student enrollment and performance statistics (post-census) and submit Annual Report to SCHEV PIV

We have initiated our internal barrier review by engaging the Institutional Effectiveness Committee (IEC). We are developing an internal set of surveys to distribute to all offices on campus to identify at least (3) barriers to the overall student experience at the College they perceive exist within their areas of student support, to rank those barriers from greatest to least challenging, and to solicit any programmatic solutions their team may be developing and/or implementing. Concurrently we are developing a similar survey to distribute to the student body at large. Within that survey, we will poll students on the same question of (3) barriers to their overall success as well as their perceptions of effectiveness of current College programming to assist them in meeting their goals. Data collection will be completed by end of the Spring 2025 semester.

Once data has been collected, the IEC will collate the results into a unified report to be submitted to the SCHEV PIV program by 30 June 2025. The report will also be disseminated internally to

the UVA Wise Senior Leadership Team and Chancellor Henry. The express goal will be to comparatively analyze the results of the surveys to identify no more than (2) specific barriers to actively pursue in the upcoming 2025-2026 academic year. Priority status will be assigned by the Senior Leadership Team.

***I1: Describe the formal protocol for continuous improvement review of grant activities and periodically revisiting an lwBR process or miniprocess. Describe any differences between review protocols for different grant activities, if any.***

Internal review process breaks down into two categories: institutional (macro) and grant program (micro). The macro review process is outlined above in part H1 and focuses specifically on big-picture concepts that, while impactful for Pell-eligible students, currently lie outside the official spectrum of programming defined by the grant application. Micro review focuses specifically on grant programming and is conducted on a regular basis through collaboration between the MAP Coordinator Kendra Sexton and the Senior Director of Undergraduate Studies Mike Shell. This is an ongoing process and is facilitated by a minimum of (2) direct meetings per month, though the communication is consistent throughout the academic year. Targets of micro review include reviewing strategies to increase awareness of and engagement with MAP-specific programming among Pell-eligible students, identification of new avenues of engagement with students within the academic environment, and long-term planning for both developing new programming and sustainability of the programming long-term. External constituent groups are consulted as necessary, and feedback from student peer leaders in the MAP is solicited by the Coordinator throughout the process to inform decision making.

***K1: Discuss efforts to identify any additional funding resources. In cases where additional outside funds have been secured, please discuss the amount, activities undertaken and any outcomes to date.***

Beginning in Fiscal Year 25, we performed a comprehensive review of the budget in the Tutor Connection, which supports the majority of our peer-learning associates. Prior to 2023, the Tutor Connection existed as a semi-autonomous program requiring its own OTPS support for supplies, etc. The Tutor Connection became part of the Academic Success Center (ASC), which has a dedicated OTPS to support all academic success programs. As such, we approved a re-allocation of the OTPS (~\$13,000 annual) into the wage budget. These additional funds will be used to expand the ranks of our peer learning specialists, including first-year mentors and academic coaches, at the conclusion of the grant periods.

I have recently submitted a three-year plan to restructure the ASC to onboard many of the student outreach and mentorship programs currently supported by the SCHEV PIV grant. As part of the restructuring, we will create a new full-time staff position in the ASC, tentatively titled Coordinator of Peer Learning. The Coordinator would lead all efforts related to academic mentorship and coaching, including the first-year Pell-eligible mentorship program, supported by the ASC operating budget. The Coordinator would also continue collaborations with the Office of Student Engagement and the Office of Admissions to plan and participate in the summer new-student orientations and Expedition extended orientation program. I have proposed appointment of current MAP Director Kendra Sexton to this position and to gradually transition her salary support to the ASC wage budget over the next (2) years. If approved, we would negotiate with SCHEV PIV on how to re-allocate salary savings from the FY24 Round 1 funding to enhance Pell-eligible student support. The restructuring plan is currently under review by Chancellor Henry and Vice Chancellor of Academic Affairs and Provost Gary Johnson.

Part of the FY24 Round 2 funding is designated to support our First Year Success Seminar (see Part M5). These funds are currently assisting in the development of a large-scale reorganization of the SEM 1010 program being proposed as the Quality Enhancement Plan as we embark on our decennial reaccreditation process through SACS-COC. The Chancellor and Senior Leadership Team have appropriated operating funds for the SEM 1010 QEP to begin in FY 26. The ASC team will continue to support the SEM 1010 program until that time.

In Fall 2024, we allocated funds from FY24 Round 2 funding to pilot programming targeting historically high D-W-F rate courses in foreign language and mathematics (see Part M6). Pending review of the program outcomes, the Provost has tentatively committed to financial support through the Academic Affairs operating budget to expand this program throughout the next three years in collaboration with the PIV grant funds.

***L1: Please attach separate reports of FY 24 Rounds One & Two and FY 25 budget expenditures, using the budget proposal format provided in the FY 26 PIV proposal.***

FY24 Round 1 Award (AWD-005190)			
	Budget	Actual	Difference
<b>FY24</b>	\$88,500.00	\$63,610.94	\$24,889.06
<b>FY25</b>	\$88,500.00	\$64,645.18	\$23,854.82
<b>FY26</b>	\$88,500.00		
<b>FY27</b>	\$88,500.00		
<b>FY24</b>	\$88,500.00		
<b>Totals</b>	\$354,000.00	\$128,256.12	\$48743.88

We have attached (2) financial reports for FY25: AWD-005190 on the first-round funding and AWD-005862 reports on the second-round funding. We have worked with our Office of Sponsored Programs to realign the budget categories in the reports with the nomenclature used in the award MOUs. The following tables provide the current annual budget versus actual expenses for each award as of 28 February 2025. Detailed breakdown of expenses classes as defined per the MOUs are attached as appendices to this report. Expense categories ending in surplus are indicated by green cells, categories that end in deficit are indicated by red cells. Funds approved for year-to-year carryover and the spending categories into which those funds are applied are indicted by yellow cells. We highlight that both awards ended fiscal year 24 with surplus funds carried over into fiscal year 25. The majority of those funds were approved to develop a new spending category for Pell Summer Scholarships to begin distribution in May 2025 (see section M3 for details). We note that the fringe benefit rate for full-time employee wages present unique budget management concerns as these rates have increased since the initial budget process and are predicted to increase again for fiscal year 26. We anticipate requesting a portion of any annual surplus funds resulting at the conclusion of fiscal year 25 (excluding those funds earmarked for the Pell Summer Scholarship Program) be approved for reallocation into the fringe categories to offset these line-item deficits.

FY24 Round 2 Award (AWD-005862)			
	Budget	Actual	Difference
<b>FY24</b>	\$50,000.00	\$43,700.59	\$6,299.41
<b>FY25</b>	\$66,667.00	\$50,915.82	\$15751.18
<b>FY26</b>	\$66,667.00		
<b>FY27</b>	\$66,666.00		

<b>FY24</b>			
<b>Totals</b>	\$250,000.00	\$94,616.41	\$22,050.59

Grant funds were used to support personnel, including the Coordinator, (15) student peer leaders, (20) SEM 1010 First Year Experience course instructors, and (2) recitation course instructors. Funds were used to purchase materials for support of the MAP activities, including marketing materials for student recruitment events (perspective student tours, new student orientation, student activities fair). Additionally, food for select events, and prizes for students participating in MAP-organized contests were also purchased from grant funds. All activities were designed to engage first-year Pell eligible students within their MAP cohorts as well as with the Academic Success Center (which hosts the MAP system).

***M1: Please describe activities as directed below by PIV Grant Year activity. All institutions should have some unique activity/information/data as enumerated below. Please use additional appended charts, graphs and narratives as needed.***

During the Summer 2024 Coordinator Sexton worked closely with the Office of Student Engagement (OSE) to use the New Student Orientation days to introduce and distribute FAQ sheets to students and their families about the MAP (see attached flyer). The ASC team also participated in the Fall 2024 parent send-off event that was hosted in conjunction with Expedition which allowed the staff members to promote the MAP to the freshmen student body and their families.

In the Fall of 2024, our mentors were paired with incoming Pell-eligible freshmen. The assigned groups ranged from five to fifteen Pell-Eligible students per mentor and were formed using their selected major or campus housing assignment. A total of (116) Freshmen were invited to participate with a mentor and MAP events. The following table illustrates the distribution of participants based on major.

Our goal was to help our new freshmen become acclimated to UVA-Wise and the community

<b>Major</b>	<b># of Students</b>
Psychology	10
Criminal Justice	4
Government/Political Science	1
History	2
English	2
Business Admin	8
Accounting BS	2
Environmental Science	2
AJU	1
Nursing	19
Computer Science	6
Software Engineering	2
Medical Terminology	2
Biology	6
Art	1
Biochemistry	2
Chemistry	3

Sports Management	1
Music	1
Lib Arts & Science History	4
Undeclared	19
Housing Assignment	18

during their first semester. Our mentors hosted weekly events on and off campus to encourage engagement among their groups of Pell- Eligible freshmen. Peer mentors oversaw the planning of weekly events for their mentees. We saw increased engagement in such events as Paint Night by the Lake, Bowling Night, and Lego of the Stress Night as shown in the following table.

In the Spring of 2025, we pivoted the focus of the MAP on Pell-eligible students who have been placed on Academic Warning or Academic Probation. Our Academic Policy states those that are under a cumulative GPA of 2.0 for one semester are placed on Academic Warning while still being in good standing. After two semesters of a student's GPA being under a 2.0, they are placed on Academic Probation. MAP mentors hold one-on-one meetings with their selected students. Currently 24 out of 30 students who are actively participating in weekly meetings are Pell-Eligible. The meetings have provided a safe environment for those students to be open and talk about issues they are having whether they are related to their academics or outside of their education. It is providing a support system that will allow us to keep a closer eye on students who may be struggling not only in the classroom but with other issues that we would not be able to address without the one-on-one meetings. We plan to extend an invitation to Pell-eligible freshman who have a GPA of 2.0-2.25 to participate in one-on-one meetings with mentors such as these. We believe that if we address any barriers, they may be facing prior to them falling below the 2.0 GPA threshold we could decrease the number of students who are placed on Academic Warning.

Week	Date	Event/Location	# Attendees	
1	30 Aug	Bowling Event-Hillcrest Lanes Wise, VA	35	
2	2-6 Sep	Kick Homesickness to the Curb (on-campus)	4	
3	13 Sep	Paint Night- Lawn by the Lake (on campus)	30	
4	16-20 Sep	"LEGO" of Stress Nights (on campus)	17	
5	7-11 Oct	Town Eateries Wise	15	
6	16 Oct	Trucker Hat Bar (on-campus)	150 (est)	Hosted with OSE; open to all students on campus
7	16 Nov	Dollywood Trip	10	Open to students who attended MAP events during the semester.

**M2: Please describe activities continued from the FY 24 Round One (I) grant and data/indications collected thus far, if any.**

Given the late start for the FY24 Round 1 project, we are continuing with only minor modifications to the programming. Specifically, we have reduced the overall number of engagement events planned throughout the semester to focus on fewer, but higher-impact, programs. We based this

on the overall low turnout (typically less than (5) students per event) we observed in the Spring 2024 semester events. As illustrated in the above table, most events have a strong engagement compared to our first semester of events. Our partnership with the Office of Student Engagement has also helped spread awareness of the MAP and drive overall engagement. We also developed an inaugural day-trip to Dollywood amusement park in Pigeon Forge, TN, for students that attended MAP events during the semester that was very well received by the students. Our Spring 2025 event schedule has been significantly disrupted by College-wide schedule changes due to extreme weather in the region; however, we are now on-track to resume normal activities and will report out on those events in the FY25 annual report in October.

***M3: Please describe any new activities from the FY 24 Round One (I) grant implemented during FY 25 and any corresponding data/indications thus far of results, if available.***

The integration of the iPass Academic Intervention Program with the MAP has proven to be a rather successful synergist project. We used FY24 Round 1 funds to support Ms. Celine Rhodes, currently a student enrolled in our new Master of Education program in Curriculum and Instruction, to coordinate the iPass intervention program. Celine was tasked with coordinating intervention programming for (5) students in the Fall 2024 semester, (3) of which were Pell-eligible students. This included individual meetings with the at-risk students, follow-up data collection from student tutors and academic coaches as well as faculty. At the conclusion of the semester, (4) students Celine worked with were retained, including all (3) of the Pell students. Celine remains on staff with the ASC team working with students in the Spring 2025 semester. The success of this approach provided the necessary data to petition the senior administration to develop a new full-time position in the Academic Success Center: Academic Intervention Specialist. Following a robust external search, Celine was selected to fill the new role and will join the team-full time in August 2025 following completion of her M.Ed. degree.

We concluded FY24 with a surplus of \$24,889.06 in FY24 Round 1 funding, and a surplus of \$6,299.41 in FY24 Round 2 funding. We received approval from SCHEV PIV to use the funds to establish a \$30,000 scholarship fund to support Pell-eligible students completing courses in the Summer Sessions for years 2025, 2026, and 2027. We will distribute (10) \$1,000 awards each summer beginning in May 2025. This value will, on average, cover the complete cost (tuition, fees, and books) for most (3) credit hour courses offered at UVA Wise in the Summer Sessions. We are currently collaborating with the Office of Financial Aid to determine the structure of the award program and how to best publicize it among our students.

***M4: Please describe any activities completed or discontinued from the FY 24 Round One (I) grant, including any outcomes and reason(s) for discontinuation, as applicable.***

We have not discontinued any activities from FY24 Round 1 to date; however, we have reorganized some of our activities to promote engagement of the first-year students as well as coordination the Office of Student Engagement and the Expedition extended orientation module.

***M5: Please describe activities continued from the FY 24 Round Two (II) grant and data/indications collected thus far, if any.***

FY24 Round 2 funding has (3) line items included in the budget: 1) additional support staff for peer mentorship, 2) enhanced first-year seminar course, and 3) exploration of academic opportunities. We are currently focused specifically in FY25 on the enhancement of the first-year seminar class, as this coincides with the development of the 2026 Quality Enhancement

Plan. The QEP represents a ground-up structural reorganization of the SEM 1010 Freshman Success Seminar course to provide incoming students with an engaging and intentional experience designed to foster connection to the institution, region, and identities as college scholars. The PIV grant is represented on the QEP team by the grant PI (Associate Provost Sabrina Qureshi), grant administrator (Sr. Director Mike Shell), and Assistant Director of the Academic Success Center (Will Waggoner). Funds from FY24 Round 2 funding were used specifically to support the teaching stipends for the (20) instructors in the SEM 1010 courses for the Fall 2024 semester. The use of grant funds allowed the QEP team to divert institutional resources into planning activities. These included sending members of the QEP team to an Intensive on the First Year Seminar event hosted by the Gardner Institute, as well as recruiting Dan Friedman, Assistant Vice President for University 101 Programs & the National Resource Center for the First-Year experience and Students in Transition to deliver the keynote address at our annual faculty and staff workshop. These investments have allowed us to implement high-impact practices into the SEM 1010 course that focus on promoting students developing a sense of perspective of how they impact their lives, communities, and civic future through their choice to pursue higher education.

***M6: Please describe any new activities from the FY 24 Round Two (II) grant implemented during FY 25 and data/indications collected thus far, if any.***

Review of long-term trends indicated that incoming students tended to have difficulty when attempting mathematics and foreign language courses in their first year at the college. At the close of the Spring 2024 term, we reached out to the Chairs of the Departments of Language and Literature and Mathematics and Computer Sciences to pilot a classroom-based recitation program in the 2024-2025 academic year. Our approach is modeled after a recitation class developed for our CHM 1010: Introduction to Chemistry course in the Department of Natural Sciences. The base structure of the recitation is as follows. Recitations were (1) credit hour course offered as a companion to the (3) credit hour lecture course. Each recitation section was staffed by a full-time faculty member accompanied by a student tutor. Students enrolled in the (3) credit hour lecture course were invited to join the recitation voluntarily based on their performance on a skill assessment conducted within the first (2) weeks of the semester. Recitation sections focused on skill-building in a smaller environment facilitated by both group and 1-on-1 interactions. The pilot is currently on-going, and we plan to debrief with the departments as the Spring 2025 semester comes to conclusion.

***M7: Please describe any activities completed or discontinued from the FY 24 Round Two (II) grant, including any data/indications of outcomes and reason(s) for discontinuation, as applicable.***

We completed the one-time upgrade of peer learning technology upgrades in the Academic Success Center at the end of FY24. Peer tutors, academic coaches, and MAP mentors have ready access, 24 hours a day, to PC-based laptops, projection screens, and relevant accessories necessary to support their duties within the ASC and MAP programs.

***M8: For FY 25 (III) please describe any previous PIV activities scaled or continued from any FY 24 Rounds One (I) or Two (II) activities in FY 25 noting the appropriate Series I or II and data/indications thus far of results, if any.***

N/A

***M9: Please describe any new activities from the FY 25 (III) grant implemented during FY 25 and data/indications thus far of results, if any.***

N/A

***M10: Please describe any activities completed or discontinued from the FY 25 (III) grant, including any data/indication of outcomes and reason(s) for discontinuation, as applicable.***

N/A

***M11: Please describe any activities conducted prior to PIV fall 23 inception the institution was conducting targeting Pell-eligible students. Indicate if these activities were a)continued as is; or b)scaled using PIV funds; or c)discontinued.***

## Appendix B: References Regarding the Need for Nursing

- Block, A., & Nicholas, A. (2022). Those Who Need the Most, Get the Least: The Challenge of, and Opportunity for Helping Rural Virginia. *U. Rich. L. Rev.*, 57, 795.
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- Smiley, R. A., Allgeyer, R. L., Shobo, Y., Lyons, K. C., Letourneau, R., Zhong, E., Kaminski-Ozturk, N., & Alexander, M. (2023). The 2022 National Nursing Workforce Survey. *Journal of Nursing Regulation*, 14(1, Supplement), S1-S90.1.
- Virginia Department of Health Profession Workforce Data Center (2022). Virginia's licensed nurse practitioner workforce: Comparison by specialty.  
<https://www.dhp.virginia.gov/media/dhpweb/docs/hwdc/nurse/2022NPComparison.pdf>
- Woodward, K. F., & Willgerodt, M. (2022). A systematic review of registered nurse turnover and retention in the United States. *Nursing Outlook*, 70(4), 664-678.

## Appendix C: Post-Completion Outcomes Data

### Process for collecting first destination data:

The Office of Career Discovery and Planning surveys those achieving undergraduate and graduate degrees from UVA Wise according to protocol and [standards](#) set by the National Association of College and Employers (NACE). Further detail:

- Each year, cohorts for August, December and May are included in the collection of data and results are reported in aggregate in accordance with NACE protocols.
- Additional data to include demographic information is retrieved via the UVA Wise student information system (SIS), Jenzabar. This provides further insight and data for additional analysis.
- Data is imported from the National Student Clearinghouse (NSC) in October, mined from social media (LinkedIn), and collected from reliable sources such as faculty to increase higher knowledge rate for each graduating class.
- The outcomes survey, which includes questions regarding experiential learning is distributed by the Office of Career Discovery and Planning. It was redesigned in January 2023 and provides a baseline on which to evaluate trends or shifts.
- Information collected from UVA Wise students is compared and contrasted to data provided by the [NACE dashboard](#) for first destination outcomes. Key metrics include: Gender, Ethnicity, Region, Public/Private, Carnegie Classification, School Size, and Academic Program as it relates to degree program, career outcomes rate, knowledge rate, and salary information.

### Key metrics for Classes 2023-2024 are:

Based on 219 graduates

- 69% knowledge rate; 81% positive career outcomes rate
- 26% attending into grad school; 46% employed; 18% searching, applying, other
- Of those responding, 76% reported experiential learning (EL) engagement at least once; 32% reported EL engagement 3 or more times
- Median wage range: \$40,000-\$49,999
- Annual salary: 12.5% reported less than \$30,000; 8% reported \$70,000 and above
- FACT PACK INFO:
  - a. Median Salary for Top 3 Majors: Business + Accounting (\$50,000), Psychology (\$45,000), Liberal Arts and Sciences (\$45,000)
  - b. Grads going into high growth industries: 65% of those reporting employment. Of the 65%, their industry breakdown:
    - i. Business: 16%
    - ii. Computer: 11%
    - iii. Counselors / Social Services: 7%
    - iv. Education: 22%
    - v. Financial Services: 7%
    - vi. Healthcare: 33%
    - vii. Trades: 4%
  - c. Alignment with career (30 responses):

- i. Very well: 70%
  - ii. Somewhat well: 20%
  - iii. Not very well: 10%
- d. Of those reporting employment: 59% working in VA, 30% working outside VA, and 11% did not report location

## CLASS OF 2024

Based on 212 graduates

- 65.5% knowledge rate; 95% positive career outcomes rate
- 26% attending grad school; 69% employed; 5% searching, applying, other
- Of those responding, 90% reported experiential learning (EL) engagement at least once; 26% reported EL engagement 3 or more times
- Median wage range: \$40,000-\$49,999
- Annual salary: 26% reported less than \$30,000; 5% reported \$70,000 and above
- FACT PACK INFO:
  - a. Median Salary for Top 3 Majors: Psychology (\$35,000), Business + Accounting (\$50,000), RN + Nursing (\$65,000)
  - b. Grads going into high growth industries: 61% of those reporting employment. Of the 61%, their industry breakdown:
    - i. Business: 28%
    - ii. Computer: 11%
    - iii. Counselors / Social Services: 10%
    - iv. Education: 26%
    - v. Financial Services: 10%
    - vi. Healthcare: 15%
    - vii. Trades: 0%
  - c. Alignment with career (47 responses):
    - i. Very well: 66%
    - ii. Somewhat well: 30%
    - iii. Not very well: 4%
  - d. Of those reporting employment: 64% working in VA, 28% working outside VA, 4% working remotely, 1% working abroad, and 3% did not report location

- CLASS OF 2025 (*in progress until 12/31/2025*)
  - Based on 300 graduates
  - To date, 44% knowledge rate; 38% positive career outcomes rate
  - 12% attending grad school; 24% employed; 64% searching, applying, other
  - Of those responding, 98% reported experiential learning (EL) engagement at least once; 21% reported EL engagement 3 or more times
  - Median wage range: \$40,000-\$49,999
  - Annual salary: 0 reported less than \$30,000; 11% reported \$70,000 and above
  - FACT PACK INFO:

- a. Median Salary for Top 3 Majors: Business + Accounting (\$60,000), RN + Nursing (\$70,000), Psychology (\$45,000)
- b. Grads going into high growth industries: 59% of those reporting employment. Of the 59%, their industry breakdown:
  - i. Computer: 12%
  - ii. Business: 4%
  - iii. Counselors / Social Services: 4%
  - iv. Education: 38%
  - v. Financial Services: 7.5%
  - vi. Healthcare: 27%
  - vii. Trades: 7.5%
- c. Alignment with career (32 responses):
  - i. Very well: 87.5%
  - ii. Somewhat well: 12.5%
  - iii. Not very well: 0%
- d. Of those reporting employment: 59% working in VA, 25% working outside VA, and 16% did not report a location

## **FY25 Report | UVA Wise Division of Strategic Engagement and Government Relations**

### **Far-Reaching Impacts**

Public, four-year institutions of higher education are crucial for driving regional economic and social vitality. Across the country, colleges and universities not only educate future leaders but also serve as engines of innovation and prosperity. Founded in 1954, UVA Wise exemplifies this role in Southwest Virginia. Originally established to cultivate local talent, UVA Wise now contributes significantly beyond its academic mission.

According to the 2023 economic impact report from the Virginia Business Higher Education Council as part of its “Growth4VA” campaign, UVA Wise contributed \$188 million to Virginia’s GDP and generated \$13 million in state tax revenue during FY2021. An updated impact study is currently underway to reflect ongoing progress.

UVA Wise upholds a strong liberal arts foundation while preparing students to become engaged and informed citizens. Many of our students are first-generation college attendees from rural communities, and we remain committed to keeping higher education accessible and affordable. The College has pledged to maintain tuition rates flat through the 2025–26 academic year.

We are proud to be recognized as the #2 public college in the nation for least student debt at graduation by *U.S. News & World Report*. Enrollment has increased, reinforcing our role in economic revitalization across the region.

### **Nationally Recognized for Economic Engagement**

Higher education institutions create conditions for a robust economy through their contributions to talent, innovation, and place. In fall 2023, UVA Wise joined 91 institutions across the U.S., including two in the Commonwealth, as an Innovation and Economic Prosperity (IEP) institution. The designation, conferred by the Association of Public Land-Grant Universities, consisted of a rigorous self-study process that ran concurrently with the College’s strategic planning process. The IEP is considered the leading certification process recognizing higher education institutions that have demonstrated a substantial, sustainable and campus-wide commitment to regional economic and community development.

### **Regional Leadership and Strategic Partnerships**

UVA Wise acts as a talent incubator, convener, and connector—driving transformational change across multiple sectors. The College plays a leading role in initiatives focused on public health, early childhood development, energy, entrepreneurship, and community and economic development, all guided by its 2030 strategic plan, *Your College for a Lifetime*. The following paragraphs outline areas in which UVA Wise plays a leadership role and leverages partnership relationships for high impact.

### *Southwest Virginia Economic Forum*

In May 2025, the College hosted the 10th Annual Southwest Virginia Economic Forum, welcoming around 340 attendees. The event featured a wide-ranging agenda focused on regional economic and workforce development. Key discussions addressed demographic trends and insights from leaders of state agencies operating under the Virginia Secretary of Commerce and Trade. Breakout sessions provided in-depth exploration of pressing issues and emerging opportunities in tourism and outdoor recreation, regional resiliency planning, community development, and agriculture. A notable highlight was the Rural Virginia Opportunity Dashboard, an innovative digital platform introduced by the Virginia Rural Center to empower rural communities across the Commonwealth.

This year's Forum was followed by a regional Housing Symposium, which addressed critical challenges in housing across Southwest Virginia. In addition, the Southwest Virginia Solar Workgroup held their Solar Summit at UVA Wise on the day before the Forum, strategically scheduled to coincide with the event, further amplifying regional collaboration and impact.

### *GO Virginia Region 1*

Since 2017, UVA Wise has served as the coordinating entity for the GO Virginia Region 1 program. GO Virginia is an initiative that encourages private-sector growth and job creation through state incentives for collaboration among businesses, education, and government.

GO Virginia aims to restore Virginia's position of economic leadership by diversifying and growing the regional economies of the Commonwealth. As the support organization for Region 1, UVA Wise focuses on economic development initiatives that foster collaboration between local government, higher education, private industry, and workforce by incentivizing projects that will create higher-paying jobs in traded sectors. Region 1 consists of thirteen counties and three cities in the westernmost part of the state.

During FY25, the GO Virginia Region 1 Council approved five Per Capita projects (three planning and two implementation) and one Helene Business Recovery Initiative project.

In total, GO Virginia Region 1 has awarded 48 projects for a total of \$10,600,912.89. Of the 48 projects, 16 are still active and 32 are closed. As of Quarter 1 2025, GO Virginia Subgrantee projects have reported 437 jobs created, 586 job retained, 27 businesses created, 52 businesses expanded, and 310 credentials awarded.

The GO Virginia Region 1 team promotes regional awareness of opportunities through the distribution of a quarterly newsletter and a bi-monthly podcast has proven to be a key instrument to keeping stakeholders engaged and informed. Through these platforms, the GO Virginia Region 1 team showcases project updates, shares success stories, and offers valuable insights through interviews with applicants, fostering transparency and community involvement in regional initiatives.

The five target industries identified by the GO Virginia Region One Council include:

- Information and Emerging Technology
- Agriculture / Food and Beverage Processing
- Advanced Manufacturing
- Energy and Minerals
- Transportation, Warehousing and Distribution

The College has produced four Growth C Development Plans for the thirteen-county, three-city region, with a fifth to be released by the end of 2025. As of June 30, 2025, the UVA Wise team has supported the GO Virginia Region 1 Council in awarding the following:

Projects: 48

- 26 Planning
- 14 Per Capita (Implementation)
- 1 Talent Pathways Initiative
- 5 Economic Resilience C Recovery (ERR)
- 1 ERR Statewide Competitive
- 1 Helene Business Recovery Initiative (HBRI)

GO Virginia Investment: \$10,600,912.89

Match Investment: \$8,433,259.23

Leveraged Resources: \$9,032,098.37

Overall Investments (includes match C additional leverage funds): \$28,066,270.49

### *Opportunity SWVA*

UVA Wise leads regional entrepreneurship ecosystem building efforts in coordination with various partners through Opportunity SWVA. This initiative empowers entrepreneurs and communities to innovate, collaborate, and thrive. Opportunity SWVA works to consolidate existing and emerging economic and community development efforts to create thriving entrepreneurial communities that accelerate progress for both new and established ventures.

### *Virginia Talent + Opportunity Partnership (V-TOP)*

As the regional coordinator for V-TOP, UVA Wise continues to lead initiatives connecting students to meaningful work-based learning across 17 counties and three cities in Southwest Virginia. A regional highlight in FY25 was the inaugural Internship Summit, presented by V-TOP and held on November 11–12, 2024, at the Southwest Virginia Cultural Center and Marketplace. This two-day event brought together 75 attendees, including eight employers and 35 students, for networking, panels, and relationship-building. Testimonials from both employers and interns underscored the mutual value of these experiences.

Partnering with the Town of Wise and faculty mentors, UVA Wise developed a standardized impact report for businesses, which is now used in consultations to help employers design effective internship programs.

### *Opportunity Appalachia*

UVA Wise is the Virginia lead partner in Opportunity Appalachia, a program for community real estate development projects that supports economic restructuring and diversification in underinvested communities of Central Appalachia. Since 2020, the program, which is funded through the Appalachian Regional Commission, has supported 58 projects that seek to raise \$471 MM in financing and create 2,700 quality jobs. Investment priorities of Opportunity Appalachia include downtown development, housing, manufacturing, IT, healthcare, education, food systems, clean energy, and heritage tourism and recreation in rural communities, with anticipated awards ranging from \$40K-\$75K.

### *STRONG Accountable Care Community (STRONG ACC)*

As the regional backbone partner for the STRONG ACC, UVA Wise plays a supportive role in advancing the organization's mission to improve physical, social, and economic health in Northeast Tennessee and Southwest Virginia, particularly for economically disadvantaged children and their families. This independent, multi-sector coalition comprises 400 partner organizations that serve the two-state region. The coalition focuses on collective impact in areas such as early childhood development, educational success, workforce development, and economic mobility.

UVA Wise faculty and staff contribute their expertise to several key workgroups, including Community Schools, Supported and Second Chance Employment, and Achievable Futures. The College also provides leadership within the STRONG ACC Leadership Council and Policy and Advocacy Committee and supports the network through marketing, partner engagement, and planning for the organization's upcoming Regional Symposium in September.

### *Appalachian Resiliency Project*

The College's collaboration with UVA Charlottesville continues to be a high-impact partnership advancing regional resilience and community development. In summer 2024, UVA Wise—working alongside the UVA Institute for Engagement and Negotiation and the Environmental Institute's Climate Collaborative Initiative—launched the Appalachian Resiliency Project in Southwest Virginia.

This multi-year initiative is designed to bring together local government leaders, community organizations, and residents with academic and professional partners to explore opportunities for building economic, environmental, and social resilience. The goal is to strengthen the ability of Southwest Virginia communities to withstand, adapt to, and recover from challenges such as natural disasters, economic shifts, and healthcare disparities.

A central component of the project is the use of the [Resilience Adaptation Feasibility Tool \(RAFT\)](#)—a collaborative effort among UVA, Virginia Tech, and Old Dominion University. The

RAFT provides a comprehensive assessment of local resilience challenges and assets, offering a roadmap for action tailored to each locality.

During the year, UVA Wise and UVA partnered closely with Dickenson and Carroll counties to co-design a customized resilience planning process. This effort has led to the development of implementation strategies focused on sustainable infrastructure, new funding opportunities, and preparation for economic diversification. To support this work, a RAFT Community Builder was hired in October 2024 to serve as a local liaison and facilitator. By November 2025, the project expanded to include one undergraduate research assistant and four project assistants—all students from UVA Wise—further embedding the initiative within the community and building regional capacity from the ground up.

### *Healthy Appalachia Institute*

UVA Wise operates the only public health institute in Southwest Virginia, leveraging relationships with UVA, the Southwest Virginia Health Authority and numerous stakeholders to positively impact the challenging health metrics across the region.

Throughout FY25, the Healthy Appalachia Institute (HAI) prioritized the ongoing implementation of the 2023–2024 Blueprint for Health Improvement and Health-Enabled Prosperity. In partnership with the Southwest Virginia Health Authority, the UVA Center for Telehealth, and the U.S. Department of Agriculture, HAI awarded grants to seven community-led projects designed to improve health outcomes across the region.

Each initiative was selected through a rigorous process informed by extensive community engagement, with emphasis on increasing access to care, substance use prevention and treatment, and improvements in diet and exercise. Evidence-based models from across Appalachia were used to guide program design and evaluation, ensuring these projects are both locally relevant and nationally informed.<sup>1</sup>

The HR team has actively supported each community partner throughout implementation, offering technical assistance, evaluation frameworks, and on-the-ground support. As we near the end of the current funding period (October 31, 2025), we are now focused on comprehensive outcome documentation, sustainability planning, and the structured evaluation process, which includes site visits, performance data, and impact reporting.

Additionally, FY25 saw major expansion in the UVA Wise research portfolio through the Grand Challenge Research Investments, focused on Neuroscience and Environmental Resilience. HAI led coordination efforts in partnership with the UVA Wise Provost, the Grand Challenge Steering Committees, and UVA Charlottesville project leadership to identify and fund innovative, cross-disciplinary research with regional and national significance in neuroscience and environmental resilience.<sup>2</sup>

These interdisciplinary projects reflect the region's strengths in health, science, and community-oriented research—and reinforce UVA Wise's role as a growing research hub in Central Appalachia.

As part of its broader mission, HAI delivers service-oriented support that promotes health system accountability, regional collaboration, and education infrastructure development. The Institute continues to provide support to the Southwest Virginia Health Authority. The director of the institute continued serving as Interim Health Monitor, providing regulatory oversight under the Virginia Cooperative Agreement governing Ballad Health System and the HAI's Fiscal Manager continued to ensure integrity across grant-funded initiatives.

Lastly, HAI produced a targeted impact report for GO Virginia Region 1 assessing workforce needs in nursing, dental assisting, and community health work. This data-driven report supports regional workforce planning and provides strategic recommendations for program development.

The HAI team remains committed to advancing regional population health through practical, regionally responsive services. These service contributions, spanning regulatory oversight, fiscal management, workforce planning, and health education reflect our belief that sustained collaboration and institutional support are key to long-term population health improvement in Southwest Virginia. As UVA Wise continues these efforts, we welcome additional opportunities to align our expertise with regional population health needs.

### **Building Regional Leadership**

As part of its mission to strengthen regional capacity, the UVA Wise Office of Community and Economic Development has launched LEAD SWVA, a first-of-its-kind leadership development initiative tailored to the unique needs and opportunities of Southwest Virginia. Announced during a special media event co-hosted by the Southwest Virginia Higher Education Center in December 2024, the program officially began on May 21 with a cohort orientation held in conjunction with the SWVA Economic Forum at UVA Wise.

The inaugural 2025 cohort includes fourteen emerging leaders who will participate in a series of leadership development trainings, regional site visits, and hands-on community engagement activities. A signature component of the program is the RALLY (Real Action Leadership Learning Yay!) project, where participants will design and implement a community development initiative. The program will culminate in a graduation celebration at the Southwest Virginia Higher Education Center in November.

LEAD SWVA is designed for individuals seeking to advance their professional skills while making meaningful contributions to their communities. The program focuses on strengthening communication, collaboration, and problem-solving abilities, while also sharing best practices in civic engagement and project delivery. At its core, LEAD SWVA equips participants to Learn, Engage, Aspire, and Deliver—setting the foundation for a new generation of regional leaders.

### **Strengthening Career Pathways**

The UVA Wise Office of Career Planning and Discovery continues to develop talent pipelines through commitment to student access and career readiness. Thanks to the generous support of Enterprise Mobility, the Mobility and Membership initiative was launched this year. Designed to eliminate transportation and network-access barriers, this initiative allowed nine students to participate in professional clothing trips and supported five students on a graduate school tour to

the University of Pikeville. Looking ahead, this initiative will expand to include memberships in professional organizations aligned with student career aspirations—including engineering, information science, and social work—creating early connections between students and their chosen industries.

Career Discovery and Planning also hosted the largest post-pandemic Career Fair this April, welcoming 22 employers to the Slemp Student Center—a 20% increase in employer presence. The event filled the venue with active engagement between students and employers, drawing praise from alumni impressed with the level of student participation and the diversity of professional opportunities presented.

Career Planning & Discovery also partnered with Parker Dewey to pilot a program benefitting the Town of Wise, campus supervisors, and UVA Wise students by offering short-term micro-internships. These 10-hour projects allowed students to engage in experiential learning at no cost to the employer.

In partnership with the Office of Advancement, Career Discovery & Planning awarded the inaugural C. Bascom Slemp Experiential Learning Scholarships. Each scholarship provided \$1,500 to student interns to offset housing, transportation, meals, and professional clothing costs—ensuring that no talented student had to decline an internship due to financial limitations.

Additionally, through a partnership with Goodwill Industries of Tennesse Area and UVA Wise alumna Lexi Gillenwater, the office offered 200 JOFI career assessment accounts to students. The JOFI tool helps students explore interests and align them with potential career paths.

### **Bolstering Innovation & Entrepreneurship**

Over the past fiscal year, the Office of Community and Economic Development (OCED) and Opportunity SWVA coordinated programming throughout the region and on the UVA Wise campus, which included several key initiatives:

#### *Entrepreneurship Concept Cup (E-Cup) Competition*

In December, UVA Wise hosted the sixth annual Entrepreneurship Concept Cup competition. This year, twelve student finalists participated, representing the largest group of competitors to date. Students showcased their innovative business concepts for a chance to win a share of \$5,000 in prizes. The competition has grown exponentially over the past six years, increasing from just four entries in 2019 to 53 in 2024. The goal is to uncover and nurture exceptional ideas from all corners of the College and develop them into compelling projects.

#### **CO.STARTERS**

The current cohort of CO.STARTERS began in mid-March, featuring fifteen participants representing various ventures preparing to start or expand their businesses in the region. CO.STARTERS is a three-month, cohort-based program that equips aspiring entrepreneurs with the insights, relationships, and tools needed to turn ideas into action and passion into sustainable, thriving

endeavors. Participants in this cohort also had the opportunity to compete for over \$4,000 in cash awards to support their business startup or expansion concepts.

### *Side Hustle Market*

On April 17, UVA Wise and The Nest, the community of student entrepreneurs, hosted the 4th annual Side Hustle Market. This farmer's market-style event allows entrepreneurs and creatives to sell or market their products, gather information and feedback on future products, share or test ideas, and pitch for crowdfunding or support.

## **Connecting Communities to Resources**

UVA Wise is committed to driving economic resilience and environmental sustainability across Central Appalachia by linking communities to impactful resources and strategic investments. Through collaborative partnerships, targeted funding opportunities, and dedicated programs, the College plays a vital role in supporting local innovation, nature-based economic development, and workforce capacity building. From expanding grant access to enhancing geospatial technologies and maximizing community spaces, UVA Wise serves as a trusted partner and catalyst for regional growth.

### *Investing in Nature-Based Economies*

UVA Wise and its partners are helping to shape a more sustainable and resilient regional economy through the Cumberland Forest Community Fund (CFCF)—a collaborative initiative that supports nature-based economic and community development projects. Administered by UVA Wise, the Fund provides critical resources to local efforts that strengthen environmental stewardship, build community capacity, and generate long-term economic value.

The CFCF is a partnership between UVA Wise, The Nature Conservancy (TNC), the Cumberland Forest Limited Partnership, and the Anne & Gene Worrell Foundation. While UVA Wise leads the administration of the program, the other partners contribute funding and expertise to support its mission.

In the most recent fiscal year, the Fund received 15 applications requesting nearly \$400,000 in total funding. Seven projects were awarded a total of \$140,000, with an average request per applicant of approximately \$25,726—nearly double the average in previous years.<sup>3</sup> This surge reflects growing regional demand and deepening interest in the Fund's potential. In response, UVA Wise is actively working with current and prospective partners to expand the Fund and broaden its impact.

### *Building GIS Capacity in Energy Communities*

UVA Wise serves as the **Virginia lead** for a project funded by the **Appalachian Regional Commission** that aims to improve the use of **Geographic Information Systems (GIS)** and geospatial technology in managing land records. This initiative focuses on advancing economic development through better access to property data and mapping tools. Recent activities include listening sessions with regional stakeholders, consultations with UVA Wise faculty on

curriculum development, and the near-final selection of two Southwest Virginia communities for feasibility and cost studies. As the planning phase concludes, partners are seeking additional funding to support project implementation.

### *Oxbow Center*

UVA Wise operates the Oxbow Center in St. Paul—an off-campus coworking site that also houses the Clinch River Ecological Education Center. All long-term office, coworking, and rental spaces in the facility are fully committed and the usage of short-term spaces for meetings, events, and various community functions have also seen an increase in usage.

The Oxbow Center also remains focused on youth education and community engagement. On April 7, the Center hosted the 11th Annual Youth Summit in partnership with local organization, volunteer faculty, and community members. Students from across the region participated in hands-on, engaging activities centered on environmental education.

### **Our Enduring Commitment**

UVA Wise continues to serve as a cornerstone for educational opportunity, economic advancement, and community well-being in Southwest Virginia. Through strategic investments in talent development, public health, entrepreneurship, and regional resilience, UVA Wise is helping shape a stronger, more equitable future for the communities it serves.

As we look to the future, our commitment remains clear—to be a place where education, innovation, and impact converge for the benefit of the region, the Commonwealth, and beyond.

### **References**

<sup>1</sup> [healthyappalachia.org/implementation](https://healthyappalachia.org/implementation)

<sup>2</sup> Neuroscience Seed Grant Awardees:

1. *Dreaming of Death: Dream Content as a Source of Existential Protection Following Mortality Awareness*  
Drs. Arrowood & Kendrick (UVA Wise), Dr. Exline (UVA Charlottesville)

2. *Endocrine Disruptors in Appalachian Waterways and Their Impact on Danio rerio Neurocircuitry*  
Drs. Borgus & Scherer (UVA Wise)
3. *The Role of Personal Relevance in Predicting Eyewitness Recognition Accuracy*  
Dr. Meltzer (UVA Wise)
4. *Genetic and Environmental Influences on Phenotypes in Seizure-Prone Drosophila*  
Dr. Messer (UVA Wise), Dr. Brusich (UW La Crosse), Dr. Jones (Moravian University)

Environmental Resilience Seed Grant Awardees:

1. *Water Quality Monitoring in the Upper Tennessee and Big Sandy Watersheds*  
Dr. Brown (UVA Wise)
2. *Vanadium-Catalyzed Conversion of Biomass Derivatives to Fuels*  
Dr. Mummadi (UVA Wise)
3. *Farm, Fork, and Future: Encouraging Sustainable Food Choices in Appalachia*  
Drs. Shen & Khan (UVA Wise)
4. *Leveraging Community-Engaged Research to Investigate the Role of High-Elevation Wetlands as a Climate Refugium in Virginia's Cumberland Mountains*  
Dr. Smith (UVA Wise), Megan Roark (High Knob Destination Center), and Katie Dunn (City of Norton)

<sup>3</sup> <https://www.uvawise.edu/news/2025/06/uva-wise-and-nature-conservancy-announce-cumberland-forest-community-fund-award>

PREPARED FOR  
**UVA Wise**



12/12/2024

# Increasing Research Activity in GO Virginia Region 1 and Central Appalachia

Feasibility Study

# 1. Executive Summary

Stakeholders continue to express a heightened interest in increasing research impacts in Southwest Virginia. Chmura prepared this report for UVA Wise, including strategies to increase research and commercialization efforts in GO Virginia Region 1 and the broader Central Appalachia area. UVA Wise can align its capabilities with regional needs along several fronts, driving economic development and innovation and augmenting its role in supporting the local entrepreneurial ecosystem.



## Current State of Research and Innovation:

GO Virginia Region 1 and Southwest Virginia lag behind peer regions in research output and patent generation, particularly when compared to parts of Central Appalachia in Kentucky, West Virginia, and Tennessee. Since 2010, Southwest Virginia has generated 25 patents, which is significantly fewer than other Appalachian areas.

The area lacks important patents related to health and behavioral sciences, which is a key area of research in other Appalachian states. Existing strengths lie primarily in energy, manufacturing, and environmental sectors, reflecting the region's industrial and coal mining history.



## Entrepreneurial Ecosystem Assets:

Supported by initiatives like Opportunity SWVA and Virginia Startup, the region possesses a growing entrepreneurial ecosystem. These programs provide critical resources, mentorship, and funding opportunities to startups and small businesses, particularly in advanced manufacturing, innovation, and business development.

However, Virginia could further enhance its support by expanding focus areas such as health innovation and regenerative industries - similar to the successful programs established in Kentucky and West Virginia. Virginia's initiatives could benefit from increased community-led approaches, networking opportunities, and access to early-stage investment through prominent seed capital funds.



## Regional Opportunities for UVA Wise:

Based on regional gaps, UVA Wise is well-positioned to focus on **three key sectors for translational research: Energy, Health and Behavioral Sciences, and Sustainable Climate Resilience**. The region's geography and demographics make it a desirable location for translating scientific discoveries into practical applications. This approach also minimizes up front investments in heavy research equipment until a research pipeline is firmly established. These sectors align with regional strengths and needs and provide a path, while remaining open to other innovations that may arise, for UVA Wise to lead in research and commercialization efforts that address local challenges. Leveraging UVA Wise's partnerships with corporate and state organizations could help close the innovation to commercialization gap.



## Research Center Feasibility:

Establishing a research center in Southwest Virginia, anchored by UVA Wise, can bridge academia and industry and provide significant support for local entrepreneurs and startups. The center, focused on translating research into marketable innovations, could offer services like business incubation, mentorship, and access to funding.

Similar programs at other institutions in Central Appalachia indicate initial costs for such a center could range from \$56M to \$341M. To match research funding at other institutions, the estimated annual operational costs range from \$7M to approximately \$230M (Note operational costs do not include costs for a building or other physical space construction, though such space is a necessary requirement for operation). Despite these expenses, the potential long-term benefits—especially in reversing brain drain and fostering economic diversification—make this a promising investment for the region. Translational research with applications for the unique needs of the region will also significantly impact the lives of residents.

Increasing research and commercialization activity in Southwest Virginia requires targeted investment in key sectors, expanded support for entrepreneurship, and stronger regional collaboration. Establishing a research center anchored by UVA Wise would serve as a catalyst for innovation and economic growth, helping the region transition into a more diverse, resilient economy.

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## 2. Introduction

Stakeholders are interested in bolstering research outcomes in Southwest Virginia to support economic development, regional growth, and prosperity. UVA Wise engaged Chmura Economics & Analytics<sup>1</sup> to investigate opportunities to align the capabilities of the institution with the needs of the region for impactful, applied research. The primary area of analysis is GO Virginia Region 1, with a secondary market study area of Central Appalachia.<sup>2</sup>

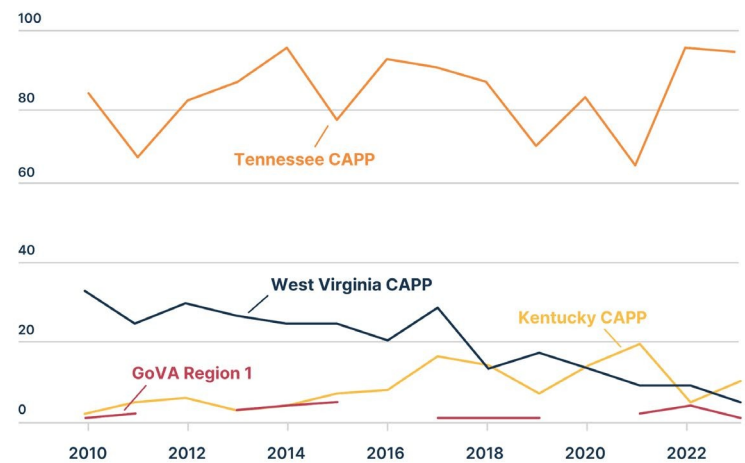
## 3. Current State of Research

### Research Activities and Patents Trail Central Appalachia Peers

Innovation provides an important engine of regional development because it leads to potential new products and services that drive employment growth. It also points toward sustained competitive advantage. Innovative regions offer more opportunities to replace declining industries and attract talent, leading to sustained, long-term growth.

Patents, often considered a lagging indicator of innovation, provide a benchmark for a comparative view of a region's innovation activity. As shown in the chart to the right, the number of utility patents assigned to Southwest Virginia consistently falls below the patenting level of other parts of Central Appalachia that fall within other states. Since 2010, 25 patents were assigned in Southwest Virginia, compared with 120 in Central Appalachian counties in Kentucky, 273 in West Virginia, and nearly 1,200 in Tennessee.

Utility patents in southwest Virginia fall below other parts of Central Appalachia



CAPP stands for Central Appalachian Region, the parts of each state included in the study.

Source: Chmura, PatentsView

Of the few patents assigned to colleges or universities in Central Appalachia, those assignments only occur in colleges and universities in Kentucky and West Virginia. Eastern Kentucky University received patents for treating reproductive cancers and for 3D imaging. Marshall University's Research Corporation, dedicated to commercialization, possesses significantly more patent assignments. Given that populations in Appalachia are prone to common health issues, the data show patents are primarily found in the biomedical field for detecting and treating issues such as hypertension, lung infections, obesity, sepsis, and cancers. Additional patents exist in electrical generation and railroad surveying.

Table 3.1: Only Two Colleges or Universities in Central Appalachia Have Patents Assigned

<b>Eastern Kentucky University</b>	<b>3</b>
LHRH-platinum conjugates for treating reproductive cancers	2
Method and apparatus for 3D imaging a workpiece	1
<b>Marshall University Research Corporation</b>	<b>24</b>
Apparatus and method for a continuous rapid thermal cycle system	2
Bacterial cultures and methods for production of alginate	1

<sup>1</sup> Chmura provides economic software, consulting, and data to our clients that help them make informed decisions to benefit their communities. Chmura's PhD economists, data scientists, and strategic planners guide clients through their local labor market. Over the past 25 years, Chmura has served hundreds of clients nationwide with thoroughness, accuracy, and objectivity.

<sup>2</sup> Regions are as defined by GO Virginia, <https://govirginia.org/regions/one/> for Southwest Virginia, and the Appalachian Regional Commission, <https://www.arc.gov/map/subregions-in-appalachia/> for Central Appalachia.

Table 3.1: Only Two Colleges or Universities in Central Appalachia Have Patents Assigned

Cardiotonic steroid antagonists and related methods	1
Compositions and methods for treating pulmonary hypertension	1
Compositions and methods for treating retinopathy	1
Compositions and methods for treating striated muscle injury, treating striated muscle atrophy and/or for promoting striated muscle growth	1
Compositions and methods for treatment of lung infections	1
Compositions and methods for treatment of uremic cardiomyopathy	1
Method of treating obesity by reversal of Na/K-ATPase inhibition	1
Methods for detecting Na/K-ATPase-mediated Src signaling for diagnosis and prognosis of cancer	1
Methods for stem cell production and therapy	1
Methods for treating obesity	1
Methods for treating sepsis	1
Methods for treatment and diagnosis of endometriosis	1
Methods of detecting and controlling mucoid pseudomonas biofilm production	2
Methods of screening chemotherapeutic agents and treating cancer	1
Motion induced electrical generator for charging and operating devices	1
Nanofiber scaffolds and methods for repairing damaged cardiac tissue	1
Oral therapy tool, system, and related methods	1
Railroad surveying and monitoring system	1
Stable bacterial cultures for producing alginates	1
Wound coverings comprising vitamin d and related methods	1

Source: Chmura, PatentsView

Patents in Southwest Virginia primarily relate to the energy sector, with some focused on sustainable climate resilience (specifically wastewater treatment). Within GO Virginia Region 1, half of all patents assigned since 2010 are held at E. Dillon & Company. The company produces construction aggregate, concrete masonry, agricultural products, and mineral fillers and extenders, with patents related to the manufacture and assembly of these products. Related to the long history of coal mining in the region, Heintzmann Corporation holds three patents related to mining, particularly ventilation. Patents assigned to other organizations are related to water desalinization and wastewater treatment, spectrometry [sic], and hydraulic lifts. Comparing this mix with other parts of Central Appalachia, Southwest Virginia has an opportunity to expand on existing strengths in energy and sustainable climate resilience, as well as expanding research and commercialization in health and behavioral sciences - the most common patenting category in other parts of Central Appalachia that is missing from Southwest Virginia patents. There are signs of recent progress in this research area; patents granted in 2024 include one for Genscript USA for preparing mRNA and one for Medentum Innovations for a diagnostic device for remote consultations and telemedicine. Specifically, the Medentum Diagnostik is designed to provide a camera, stethoscope, and low-cost biometric sensors to rural patients, allowing them to connect to primary care physicians and specialty providers for care.<sup>3</sup> Additionally, Wrap Technologies recently announced it would be relocating its manufacturing and research and development activity to Southwest Virginia.<sup>4</sup> The company holds 25 patents related to its non-lethal, near-range projectile systems for de-escalating in law enforcement contacts and for its VR training platforms, and there may be an opportunity for the region to build on this strength and translate behavioral sciences findings and best practices, especially for rural communities, into product development and training.

<sup>3</sup> Medentum Innovations, <https://medentum.com/>, accessed November 2024.

<sup>4</sup> Office of the Governor, "Wrap Technologies Relocates to Southwest Virginia, Expanding in Manufacturing, Defense, and Public Safety Tech Products, Creating 126 New Jobs." November 2024. <https://www.governor.virginia.gov/newsroom/news-releases/2024/november/name-1036851-en.html>

Table 3.2: Patents in Southwest Virginia Primarily Relate to the Energy Sector

<b>E. DILLON &amp; COMPANY</b>	<b>12</b>
Cap block for capping walls	1
Double-wall structure comprised of interconnected dry-stacked wall blocks	1
Lightweight concrete masonry veneer unit	1
Masonry unit manufacturing method	1
Mine safety dust and method of production	2
Mine seal and method of construction for high resistance to transverse loads	1
Mold assembly for molding two concrete blocks and method of manufacturing concrete blocks	1
Retaining wall block and retaining wall comprised of retaining wall blocks	1
Segmental retaining wall corner block	1
Segmental retaining wall corner block and wall corner comprised of corner blocks	1
Wall construction system	1
<b>GENSCRIPT USA INC.</b>	<b>1</b>
Compositions and methods for preparing capped mRNA	1
<b>Heintzmann Corporation</b>	<b>3</b>
Apparatus and method for supporting a mine rib	1
Inflatable ventilation life curtain	1
Pumpable mine ventilation structure	1
<b>Medentum Innovations, Inc</b>	<b>1</b>
Diagnostic device for remote consultations and telemedicine	1
<b>MICRONIC TECHNOLOGIES, INC.</b>	<b>2</b>
Systems and methods for water desalinization	2
<b>NORRIS SCREEN AND MANUFACTURING, INC.</b>	<b>1</b>
Screen deck assembly	1
<b>CERAMIC TECHNOLOGY, INC.</b>	<b>1</b>
Ceramic smart impact panel	1
<b>Power Distribution Products, Inc.</b>	<b>1</b>
Extreme duty encapsulated transformer coil with corrugated cooling ducts and method of making the same	1
<b>Eoir Technologies, Inc.</b>	<b>1</b>
Systems and methods for comparative interferogram spectrometry	1
<b>QRC, LLC</b>	<b>1</b>
Systems and methods for emulating an interference environment	1
<b>THE MURDOCH METHOD, LLC</b>	<b>1</b>
Methods for stability enhancement for recreational animals	1
<b>J-PYOTT AND ASSOCIATES, INC.</b>	<b>1</b>
Hydraulic lift mechanism and method of use	1
<b>Micronic Industries, Inc.</b>	<b>1</b>
Compacted air flow rapid fluid evaporation system	1
<b>Wrap Technologies, Inc.*</b>	<b>25</b>
Systems and methods for generating optical beam arrays	1
Systems and methods for non-lethal, near-range detainment of subjects	1
Projectile launching systems with anchors having dissimilar flight characteristics	1
Protective coverings and related methods for entangling projectiles	1

Projectile launching systems with anchors having dissimilar flight characteristics	1
Entangling projectiles and systems for their use	1
Seal-carrying entangling projectiles and systems for their use	1
Systems and methods for providing information to users of hand-held weaponry	1
Systems and methods for non-lethal, near-range detainment of subjects	1
Entangling projectiles and systems for their use	1
Perimeter security system with non-lethal detainment response	1
Systems and methods for non-lethal, near-range detainment of subjects	1
Adhesive-carrying entangling projectiles and systems for their use	1
Entangling projectiles and systems for their use	1
Entangling projectiles and systems for their use	1
Adhesive-carrying entangling projectiles and systems for their use	1
Launcher battery assembly	1
Projectile launcher	1
Projectile anchor	1
Systems and methods for generating targeting beams	1
Entangling projectile deployment system	1
Entangling projectiles and systems for their use	1
Entangling projectile deployment system	1
Projectile launcher	1
Projectile casing	1

Source: Chmura, PatentsView, Justia

\*Note, Wrap Technologies patents were not assigned within Southwest Virginia and are not counted in the region's totals, but in November 2024 the company announced it would be relocating all manufacturing and research and development to a new facility in the region.

## Programs in Southwest Virginia Support Entrepreneurial Activity

The Office of Community and Economic Development at UVA Wise plays a vital role in driving entrepreneurial and economic activities in Southwest Virginia through strategic partnerships and resource alignment. As the only four-year public institution in the region, UVA Wise serves as a key facilitator for linking the strengths of the University of Virginia with local communities, supporting projects that enhance professional and leadership development, which underpin economic growth throughout the area.

The college's commitment to promoting economic development is evidenced by its commitments to the heart of several collaborative efforts. These efforts are exemplified by UVA Wise's involvement with the GO Virginia Region One initiative, which focuses on improving regional collaboration to promote innovation and job creation. Through the **Oxbow Center, an innovative coworking space and ecological education space**, UVA Wise offers specialized resources to help businesses scale, including entrepreneurship training programs, mentoring, and access to a field station for researchers.

In 2023, UVA Wise was designated an Innovation and Economic Prosperity (IEP) institution by the Association of Public & Land-Grant Universities (APLU). The college maintains close relationships with major corporations and organizations including Virginia Energy and CGI Wize Solutions, Invest SWVA, which the college supports with internship programs and other talent initiatives.

UVA Wise also actively promotes entrepreneurship in Southwest Virginia through partnerships with initiatives such as The Nest, which provides resources for aspiring entrepreneurs, Opportunity SWVA, a collaborative effort to strengthen regional entrepreneurship, and the **Entrepreneurship Cup, an annual competition designed to encourage new ventures and innovative ideas among students and community members**. In addition, through the Hatch Business Accelerator, UVA Wise and Opportunity SWVA partners support CO.STARTERS, a three-month, cohort based program for aspiring entrepreneurs. Graduates of the program have launched products, created online stores, and leased office space for ventures such as food, art, or book sales, as well as industrial consulting services,<sup>5</sup>

Additionally, UVA Wise participates in the **Opportunity Appalachia** program, an initiative under Appalachian Community Capital that is designed to attract investment to underserved Appalachian communities by providing targeted support for economic development projects.<sup>6</sup> This program helps promote job creation and sustainable growth across sectors such as healthcare, clean energy, manufacturing, as well as through downtown revitalization. By offering **technical assistance in areas like financial modeling, market feasibility, architectural planning, and business development**, Opportunity Appalachia helps projects in these communities to secure necessary investments and successfully implement their initiatives.

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*It's imperative that we work together across Appalachia to transition and diversify the region's economies. I commend Appalachian Community Capital for convening and building relationships between investors who share the common goal of putting plans to action in ways that are helping to usher in a new era of prosperity for an often overlooked but resilient region. – Gayle Manchin, Co-Chair of the Appalachian Regional Commission*

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In 2023, the program launched a portfolio of 33 high-impact projects spanning various sectors, including downtown development, healthcare, IT, clean energy, and manufacturing. The projects, projected to create approximately 3,000 jobs, target individuals such as the long-term unemployed, those in addiction recovery, and minority populations.<sup>7</sup> In support of these projects, Opportunity Appalachia hosted a virtual Investor Convening in 2023, inviting a broad audience, including investors, economic development professionals, business owners, and elected officials. The convening sought to connect project developers with potential investment partners to secure \$187 million in financing. Highlighted projects include the Blue Mountain Expansion in Abingdon, the Mountain Empire Community

<sup>5</sup> UVA Wise. "UVA Wise Celebrated First community Entrepreneur Cohort, Seeks New Participants for 2023." December 2022. <https://www.uvawise.edu/news/2022/12/uva-wise-celebrates-first-community-entrepreneur-cohort-seeks-new-participants-2023>

<sup>6</sup> Appalachian Community Capital. "Opportunity Appalachia." September 2024. <https://appalachiancommunitycapitalcdfi.org/opportunity-appalachia/>.

<sup>7</sup> University of Virginia's College at Wise. "Opportunity Appalachia Investor Convening to Showcase 33 High-Impact Projects Anticipated to Create 3,000 Jobs." May 23, 2023. <https://www.uvawise.edu/news/2023/05/opportunity-appalachia-investor-convening-showcase-33-high-impact-projects-anticipated>.

College Outdoor Amphitheater in Big Stone Gap, and the Whistle Pig Farmers Market & Country Store in Ewing. In 2024, Opportunity Appalachia received 12 applications totaling nearly \$25 million. The organization recommended four for technical assistance approval of over \$6 million in Virginia to renovate former commercial buildings into mixed-use commercial and residential spaces.

Expanding research to additional resources and models in Central Appalachia helps identify gaps that need to be addressed to strengthen the region's entrepreneurial ecosystem. Examining established programs and partnerships beyond GO Virginia Region 1 can help pinpoint areas where targeted efforts could further enhance innovation and commercialization opportunities. Central Appalachia is home to a variety of successful initiatives, including those in West Virginia, Kentucky, North Carolina, and Ohio, where institutions have forged strong ties between universities and industry partners to advance sectors like energy, healthcare, and sustainable agriculture.

## Asset Map of Entrepreneurial Ecosystem Identifies Gaps and Promising Programs

The table below highlights the robust entrepreneurial ecosystem in GO Virginia Region 1 and the broader Central Appalachia region. Each institution or organization listed provides unique contributions toward fostering innovation, economic development, and community resilience.

Virginia has several standout programs supporting commercialization and entrepreneurship, offering resources that are not always present in other parts of Central Appalachia. For example, the Virginia Innovation Partnership Corporation plays a vital role in driving tech-based businesses through funding, mentorship, and research support, which is critical for advancing high-tech startups. The Virginia Small Business Supplier Diversity (SBSD) program provides crucial support to small, women-owned, and minority-owned businesses by helping them gain access to state and federal government contracts. This initiative offers a unique advantage for businesses seeking government work, and gives Virginia an edge over regions with less emphasis on access to federal contracts. Additionally, the Southwest Virginia Alliance for Manufacturing plays a pivotal role in promoting advanced manufacturing by connecting industries with educators and workforce development initiatives. Virginia Startup provides comprehensive support to startups across the state, including access to mentorship, funding, and a strong innovation ecosystem. Through such programs, Virginia continues to build a robust support system for high-tech startups and commercialization efforts that drive local economic growth.

Missing in Virginia, programs in other states highlight key opportunities for expanding the entrepreneurial ecosystem in Southwest Virginia. These include initiatives like Accelerating Appalachia in Kentucky, which focuses on supporting entrepreneurs in regenerative industries, such as sustainable agriculture, food systems, and natural products. Virginia's focus on technology and advanced manufacturing could be complemented by developing similar programs to tap into the growing market for regenerative industries and sustainable development. Another example is West Virginia's Community Development Hub, which emphasizes community-led economic development through grassroots-driven projects. Virginia's current initiatives could benefit from incorporating more community-led approaches, engaging local residents in the planning and execution of economic development projects, particularly in rural or underserved regions. In Kentucky, the Bluegrass Angles and Commonwealth Seed Capital funds offer early-stage investment specifically targeting local startups in technology, bioscience and advanced manufacturing. A prominent angel investor network, or state-backed seed capital fund that focuses on early-stage ventures, would help Virginia startups close this gap. Southwest Virginia also doesn't have the same level of focus on health innovation as seen in the XLerateHealth program in Kentucky. Building a stronger network for health and behavioral sciences startups can help diversify its innovation ecosystem. By adapting these models, Virginia can address key gaps and expand its support for diverse entrepreneurial efforts in Southwest Virginia.

**TABLE 3.1: Asset Map of Contributors to GO Virginia Region 1/Central Appalachia Entrepreneurial Ecosystem**

Institution/Organization	Contribution/Capability	Sector Focus	State
<b>Virginia Small Business Supplier Diversity (SBSD)</b>	Supports small, women-owned, and minority-owned businesses by providing resources, certifications, and access to state contracts.	Business Development	VA
<b>Opportunity SWVA</b>	A collaborative effort to strengthen entrepreneurship and small business development across Southwest Virginia by providing resources, mentorship, and access to networks.	Entrepreneurship, Small Business Development	VA
<b>Southwest Virginia Alliance for Manufacturing (SVAM)</b>	Promotes advanced manufacturing in Southwest Virginia by connecting	Advanced Manufacturing,	VA

TABLE 3.1: Asset Map of Contributors to GO Virginia Region 1/Central Appalachia Entrepreneurial Ecosystem

Institution/Organization	Contribution/Capability	Sector Focus	State
	industries, educators, and workforce development initiatives to grow the region's manufacturing sector.	Workforce Development	
Virginia Startup (VA Startup)	Provides resources, mentorship, and funding opportunities to entrepreneurs and startups across Virginia, fostering innovation and economic growth in the region.	Entrepreneurship, Innovation	VA
Virginia Highlands Small Business Incubator (VHSBI)	Offers office and manufacturing space, mentorship, and resources for small businesses and startups, helping them grow and scale operations in Southwest Virginia.	Business Development, Startups	VA
Apex Center for Entrepreneurs (Virginia Tech)	Serves as a hub for entrepreneurship at Virginia Tech, providing resources, mentoring, and funding for students and faculty to grow their startups and commercialize research.	Entrepreneurship, Innovation, Research	VA
UVA Wise Office of Community and Economic Development	Drives economic growth in Southwest Virginia by facilitating partnerships, supporting workforce development, and providing resources for entrepreneurs and local businesses.	Economic Development, Workforce Development	VA
RAMP (Regional Accelerator and Mentoring Program)	A business accelerator in Roanoke, offering mentorship, networking, and funding opportunities for high-growth startups, particularly in technology and life sciences.	Tech Startups, Innovation, Mentorship	VA
Appalachian Community Capital	Facilitates access to capital for community development financial institutions (CDFIs) and provides financing to underserved communities across Appalachia for impactful local projects.	Community Development, Finance	VA
Virginia Innovation Partnership Corporation (VIPC)	Provides funding, mentorship, and resources to support technology-driven businesses and fosters research and innovation to drive Virginia's tech industry.	Technology, Innovation, Research	VA
WV Hive Network	Entrepreneurial support program that provides comprehensive resources, mentorship, and technical assistance to startups and small businesses in West Virginia in order to foster economic and community development.	Entrepreneurship, Business Development, Community Growth	WV
Community and Business Resilience Initiative (CBRI)	Provides workforce, business, and industry growth support through community coaching, site development, and business services in collaboration with the ACT Now Coalition, focusing on resilience and sustainability in the Appalachian region.	Economic Resilience, Community Development, Business Growth	WV
WVU LaunchLab	Offers comprehensive startup services to West Virginia University students, faculty, and community members, including business mentoring, funding opportunities, and commercialization support.	Entrepreneurship, Innovation, Commercialization	WV
Communities of Achievement Program	(HubCAP)	Empowers local teams to design and im-	

plement multi-year community revitaliza- tion and economic development projects.	Community Develop- ment, Economic Resili- ence, Revitalization	WV	
<b>PATTERN (Accelerating Textile Technology)</b>	Focuses on accelerating the outdoor and manufacturing industries within the New	Manufacturing	WV

TABLE 3.1: Asset Map of Contributors to GO Virginia Region 1/Central Appalachia Entrepreneurial Ecosystem

Institution/Organization	Contribution/Capability	Sector Focus	State
	River Gorge region by leveraging West Virginia's expertise in outdoor recreation, heritage, and craftsmanship to create new manufacturing opportunities	Innovation, Workforce Development, Textiles	
ScaleUp West Virginia (TechConnect WV)	Provides SBIR/STTR assistance for startups and small businesses seeking federal research funding, helping scale innovation-driven ventures in West Virginia.	Entrepreneurship, Innovation, Federal Funding	WV
West Virginia Community Development Hub	Catalyzes community-led economic development by providing resources and facilitating partnerships that strengthen local economies and enhance community resilience across West Virginia.	Community Development, Economic Resilience	WV
Marshall University Manufacturing Center	Provides advanced manufacturing and workforce training services, offering research and technical assistance to enhance manufacturing capacity in West Virginia and the surrounding region.	Advanced Manufacturing, Workforce Development	WV
WVU Business Research & Outreach Centers at John Chambers College of Business and Economics	Drives business innovation and economic research, offering data analysis, outreach, and strategic insight for fostering economic development and supporting businesses in West Virginia.	Business Research, Economic Development	WV
Marshall University Research Corporation (MURC)	Supports and expands Marshall University's research efforts, providing grant administration, technology transfer, and commercialization assistance to enhance research and business development.	Research, Technology Transfer, Commercialization	WV
Shepherd University Center for Regional Innovation	Offers collaborative space, resources, and mentorship to foster innovation, entrepreneurship, and regional development, with a focus on the Eastern Panhandle of West Virginia.	Innovation, Entrepreneurship, Regional Development	WV
Encova Center for Innovation and Entrepreneurship (WVU)	Supports entrepreneurship through education, mentoring, and applied learning, with programs that encourage student-led startups and innovation throughout West Virginia.	Innovation, Entrepreneurship, Education	WV
MATRIC (Mid-Atlantic Technology, Research & Innovation Center)	Provides research, development, and commercialization services in chemistry, energy, and environmental technologies to promote innovation in West Virginia.	Research, Innovation, Technology	WV
WVU Industrial Extension	Provides technical assistance and training to manufacturing companies in West Virginia to improve operational efficiency, enhance product quality, and increase workforce productivity.	Advanced Manufacturing, Workforce Development, Technical Assistance	WV
Unlimited Future, Inc.	A business incubator and training center in Huntington, WV, offering mentorship, training, and support services for aspiring entrepreneurs, with a focus on minority and underserved communities.	Entrepreneurship, Business Development	WV
Accelerating Appalachia	Supports entrepreneurs in regenerative industries like farming, food systems, and natural products, offering training, mentorship, and access to investment networks across the Appalachian region.	Sustainable Agriculture, Natural Products, Entrepreneurship	KY
Community and Economic Development Initiative of Kentucky (CEDIK)	Provides economic impact studies, community assessments, leadership	Economic	KY

TABLE 3.1: Asset Map of Contributors to GO Virginia Region 1/Central Appalachia Entrepreneurial Ecosystem

Institution/Organization	Contribution/Capability	Sector Focus	State
	development, and regional planning services to promote economic resilience and growth in Kentucky.	Development, Community Planning, Research	
<b>Awesome, Inc.</b>	Supports startups and entrepreneurs in Kentucky through training, mentorship, and co-working spaces, fostering innovation and developing tech talent in the region.	Entrepreneurship, Innovation, Tech Startups	KY
<b>XLerateHealth</b>	A health startup accelerator focused on helping early-stage healthcare companies commercialize their innovations, providing mentorship, funding, and connections to investors and healthcare networks.	Healthcare Innovation, Startups, Commercialization	KY
<b>Bluegrass Angels</b>	Provides seed and early-stage capital to innovative startups in Kentucky, offering mentorship, investment, and strategic guidance to foster the region's entrepreneurial ecosystem.	Angel Investment, Startups, Innovation	KY
<b>Commonwealth Seed Capital</b>	An independent fund that invests in early-stage Kentucky-based businesses, particularly in technology, bioscience, and advanced manufacturing, to help commercialize innovative ideas.	Investment, Startups, Innovation	KY
<b>TechGROWTH Ohio</b>	Provides business assistance, entrepreneurial support, and access to capital for startups and early-stage companies in Southeast Ohio, especially in underserved regions.	Entrepreneurship, Innovation, Access to Capital	OH
<b>ASTeCC (Advanced Science and Technology Commercialization Center)</b>	A high-tech business incubator at the University of Kentucky that fosters innovation by supporting startups in biotechnology, energy, and materials science through collaboration with university research.	Business Incubation, Research Commercialization, Technology	KY
<b>Rev1 Ventures</b>	An investor startup studio that helps early-stage entrepreneurs and startups in Ohio by providing funding, mentorship, and connections to corporate and institutional partners to accelerate growth.	Startups, Innovation, Investment	OH
<b>WCU Rapid Center</b>	Provides engineering and business expertise to startups and entrepreneurs, offering support in product development, prototyping, and commercialization in Western North Carolina.	Entrepreneurship, Product Development, Innovation	NC
<b>Startup High Country</b>	Supports entrepreneurs and startups in North Carolina by offering access to resources, mentorship, networking opportunities, and training to help local businesses grow and succeed.	Entrepreneurship, Startups, Business Development	NC
<b>North Carolina Small Business and Technology Development Center (SBTDC)</b>	A business advisory resource for growing and developing small to mid-sized businesses in NC, offering expertise in financial management, planning, marketing, and operations. Leverages the resources of 16 UNC campuses and partners with the U.S. Small Business Administration to provide statewide support.	Business Development, Technology, Small Business Support	NC

## 4. Regional Benchmarking

### Similar Programs at Universities in Central Appalachia Show Opportunities for UVA Wise

Similar programs across Central Appalachia demonstrate various successful models for fostering research, commercialization, and entrepreneurial growth. These programs provide valuable insights and opportunities that UVA Wise could draw upon to enhance its own initiatives. Key drivers of success in strategies implemented by institutions like Marshall University, Appalachian State University, and Eastern Kentucky University include strong university-industry partnerships, access to funding, and focus on regional economic development. The following examples highlight how these institutions leveraged their research capabilities and industry connections to support regional innovation and offer potential pathways for UVA Wise to explore.

**Marshall University:** The **Marshall University Research Corporation (MURC)** operates as a not-for-profit entity, chartered under the laws of West Virginia, with a focus on supporting and expanding the university's research efforts.<sup>8</sup> The organization provides comprehensive services for research projects to both faculty and external partners. MURC facilitates the pre-award phase by helping researchers identify potential sponsors, interpret proposal guidelines, develop budgets, and secure institutional approvals. The organization also plays a key role in negotiating awards with sponsors. Once funding is secured, MURC manages the post-award process, assisting investigators in administering funded projects, acting as the fiscal agent for grants and contracts, and providing essential personnel and payroll services for grant-funded roles. In addition to its grant administration functions, MURC maintains research integrity by coordinating institutional review boards, oversees compliance in research involving human and animal subjects, and manages conflicts of interest. The organization also supports technology transfer and business development, assisting with the invention disclosure process, securing patents, and marketing university technologies to industry partners. MURC's services extend to aiding startups with business development and commercialization efforts. Furthermore, MURC provides extensive training and development in grantsmanship, offering services such as locating grant opportunities, building relationships with funders, and supporting project partnerships. MURC's project management services ensure a thorough review and edit of grant applications and ensures submission of those applications complies with funder requirements.



**NCInnovation:** The **NCInnovation Program** is a statewide initiative designed to accelerate commercialization of research and foster economic growth across North Carolina.<sup>9</sup> This collaboration among small and mid-sized institutions highlights how state-backed programs can effectively engage smaller colleges to create robust research ecosystems. NCInnovation focuses on creating an innovation-driven economic ecosystem by leveraging the research potential of North Carolina's large variety of universities. While large research institutions often dominate commercialization efforts, NCInnovation recognizes the untapped potential in smaller, rural universities. The program connects these institutions with industry partners, provides strategic mentorship, and allocates funding for applied research with commercial viability.

**Western Carolina University (WCU):** Western Carolina University (WCU) is now a key player in NCInnovation's initiative. This collaboration emphasizes promoting both regional and statewide economic growth through the commercialization of applied research. NCInnovation's model provides essential funding, mentorship, and resources to help WCU researchers bring impactful innovations to market. The university's focus on health, environmental sustainability, and other areas of local relevance, positions it as a critical force in driving job creation and workforce development in western North Carolina. A grant awarded to WCU for research into mosquito-borne infectious diseases, led by Dr. Brian Byrd, provides a recent example of the impact of this partnership.<sup>10</sup> The grant spans two years and should enable researchers to scale the technology for widespread global application and solidify support from an industry partner.



<sup>8</sup> Marshall University Research Corporation. "Marshall University Research Corporation (MURC)." September 2024. <https://www.marshall.edu/murc/>.

<sup>9</sup> North Carolina Innovation. "About NCInnovation." September 2024. <https://ncinnovation.org/about/>.

<sup>10</sup> Western Carolina University. "Faculty Members Receive Grant Funding from NCInnovation for Mosquito-Borne Infectious Disease Identification." May 2024. <https://www.wcu.edu/stories/posts/News/2024/05/faculty-members-receive-grant-funding-from-ncinnovation-for-mosquito-borne-infectious-disease-identification.aspx>.

**Appalachian State University:** The Beemon system project, led by Dr. Rahman Tashakkori of Appalachian State University, is structured around a two-year grant from NCInnovation.<sup>11</sup> The grant focuses primarily on scaling the innovative technology for commercial use. The grant also formalizes intellectual property (IP) and secures industry partnerships, which can support its expansion. The project's framework calls for strategic development, beginning with scaling the technology from a prototype to a market-ready product and ensures it meets the needs of commercial and amateur beekeepers. The grant design also focuses on helping to identify established industry partners.



**Eastern Kentucky University:** Eastern Kentucky University's **Center for Renewable and Alternative Fuel Technologies (CRAFT)** is designed to foster a new, sustainable biofuel production industry in Kentucky, with the potential to create a significant global impact.<sup>12</sup> CRAFT operates by partnering with for-profit and nonprofit organizations, including the Appalachian Regional Commission, Commerce Lexington, Kentucky Agricultural Development Board, and Defense Logistics Agency, among others. This collaborative approach allows the center to leverage its resources to conduct cutting-edge research and support the emerging biofuels market. CRAFT provides industry partners with access to state-of-the-art research facilities and a highly experienced team of researchers. This arrangement helps companies, especially those entering fast paced and competitive sectors like biofuels, by offering essential services such as ethanol and biodiesel yield analysis, environmental impact studies, and chemical identification methodologies.



**James Madison University:** JMU took significant steps to bolster the entrepreneurial ecosystem in the Shenandoah Valley.<sup>13</sup> Through its tech transfer office, JMU plays a central role in delivering a new economic development initiative aimed at building regional entrepreneurial capacity. The university is instrumental in coordinating activities and making connections that enhance the region's attractiveness to technology companies and startups. JMU's efforts include active participation in the Shenandoah Valley Innovation Coalition, a collaborative network of business, government, and academic organizations, and support for the Shenandoah Valley Angel Investors network, which has invested \$7.5 million in 19 companies, including several started by JMU alumni.<sup>14</sup> By integrating these initiatives with broader regional economic development strategies, JMU significantly increased visibility and support for entrepreneurial activities across a geographically expansive area, including 10 counties and eight municipalities.



**Ohio Innovation Exchange:** The **Ohio Innovation Exchange (OIEx)** serves as a collaborative platform connecting Ohio's universities with industry partners, fostering innovation and economic growth.<sup>15</sup> By linking companies with academic research, expertise, and facilities from institutions like Ohio State University, the University of Cincinnati, and others, OIEx facilitates partnerships that drive technological advancements and commercialization. The platform provides businesses with access to over faculty profiles, research centers, and equipment to support research and development efforts. A recent study performed by the Upjohn Institute focused on strategies to enhance the Ohio Innovation Exchange.<sup>16</sup> The study identified key approaches for improving the effectiveness of OIEx, including the development of stronger university-industry partnerships, increased access to research expertise and resources, and the promotion of knowledge transfer to support economic growth in the region.

<sup>11</sup> North Carolina Innovation. "Grants." September 2024. <https://ncinnovation.org/grants/>.

<sup>12</sup> Eastern Kentucky University. "About CRAFT." September 2024. <https://craft.eku.edu/about>.

<sup>13</sup> <https://ruralinnovation.us/wp-content/uploads/2021/04/COR-IHE-Report.pdf>

<sup>14</sup> Center on Rural Innovation. "Cultivating Entrepreneurship: Higher Ed's Role in Rural Innovation Ecosystems." April 2021. <https://ruralinnovation.us/wp-content/uploads/2021/04/COR-IHE-Report.pdf>.

<sup>15</sup> Ohio Innovation Exchange. "Ohio Innovation Exchange." <https://www.ohioinnovationexchange.org>

<sup>16</sup> W.E. Upjohn Institute for Employment Research. "New Study Highlights Strategies to Enhance Ohio Innovation Exchange." June 10, 2024. <https://www.upjohn.org/news/new-study-highlights-strategies-enhance-ohio-innovation-exchange>

## UVA Wise Capabilities Suggest Three Key Research Sectors to Support Commercialization

A 2018 study of entrepreneurial ecosystems in Appalachia identified several areas of opportunity in Southwest Virginia, among other parts of Central Appalachia.<sup>17</sup> The report highlights an absence of peer networks for entrepreneurs to connect within the region, as well as outside the region. UVA Wise assets, current research, and gaps identified above suggest that energy, health and behavioral sciences, and sustainable climate resilience areas are poised for innovative development in the region.

**Energy:** The energy sector in Central Appalachia highlights a critical area of research and development, driven by institutions such as Appalachian State University (App State), West Virginia University (WVU), and collaborations such as the University of Kentucky and Oak Ridge National Laboratory partnership. These institutions advance clean energy technologies and address energy resilience to meet regional and national needs. These institutions pursue energy research that relies on heavy equipment and significant capital investment. Given such investment required, UVA Wise would not be able to quickly start similar research but could start with translational research in energy and practical applications.



At Appalachian State University, the Appalachian Energy Center plays a pivotal role in advancing renewable energy solutions and sustainability efforts.<sup>18</sup> AEC's research covers a broad spectrum, including energy efficiency, solar energy systems, and sustainable building practices. The center works closely with local communities, offering training and educational programs to promote the adoption of clean energy technologies across the region. The Energy Institute at West Virginia University focuses on emerging energy trends and clean energy solutions, generating over \$6 million in research funding annually.<sup>19</sup> WVU's recent research includes a contract with the U.S. Department of Energy focused on rare earth element extraction from acid mine drainage, which presents a critical solution for both environmental cleanup and securing valuable resources necessary for various industries.<sup>20</sup> In 2023, WVU broke its record for externally supported expenditures by reporting a record \$231 million in externally supported expenditures.<sup>21</sup> The institution's collaborations span federal, state, industry, and private donors, with federal expenditures accounting for 48% of external support. Furthermore, the University of Kentucky and Oak Ridge National Laboratory established a partnership to focus on clean energy advancements in Appalachia.<sup>22</sup> Their efforts aim to bolster the region's transition to sustainable energy sources while providing economic opportunities through workforce development and innovative solutions to both regional environmental and economic challenges.

UVA's Environmental Institute (formerly the Environmental Resilience Institute) supports interdisciplinary research and training in environmental solutions. Since 2017, the Institute engaged with local communities and supported projects to research innovation for a sustainable future. UVA Wise can build on this foundation to address environmental challenges, and increased energy demands in Central Appalachia, particularly in Southwest Virginia.

While it could take a decade or more for UVA Wise to build up the equipment for heavy energy research, the institution is well positioned today to pursue transitional research. Such research focuses on translating basic scientific discoveries into practical applications

<sup>17</sup> EntreWorks Consulting with the Center for Rural Entrepreneurship and the Center for Regional Economic Competitiveness, "Entrepreneurial Ecosystems in Appalachia: Ecosystem Development Case Studies," September, 2018 <https://www.arc.gov/wp-content/uploads/2018/09/EntrepreneurialEcosystem-sCaseStudies2018.09.pdf>

<sup>18</sup> Appalachian State University. "Appalachian Energy Center." September 2024. <https://energy.appstate.edu/>.

<sup>19</sup> West Virginia University. "WVU Energy Institute Transforming to Serve Emerging Energy Trends." May 17, 2023. <https://wvutoday.wvu.edu/stories/2023/05/17/wvu-energy-institute-transforming-to-serve-emerging-energy-trends>.

<sup>20</sup> West Virginia University. "Going to Waste: Coal Mining Leftovers May Produce Economic Renewal at Old Mines." April 9, 2023. <https://magazine.wvu.edu/stories/2023/04/09/going-to-waste-coal-mining-leftovers-may-produce-economic-renewal-at-old-mines>.

<sup>21</sup> West Virginia University. "WVU Breaks Record for Externally Supported Expenditures, Underscoring Research Commitment." August 24, 2023. <https://energy.wvu.edu/news/2023/08/24/wvu-breaks-record-for-externally-supported-expenditures-underscoring-research-commitment>.

<sup>22</sup> Oak Ridge National Laboratory. "ORNL, University of Kentucky Focus on Clean Energy for Appalachia." March 26, 2024. <https://www.ornl.gov/news/ornl-university-kentucky-focus-clean-energy-appalachia>.

for real-world implementation. The institution's strong natural science department could support biofuels research, and the social sciences department can provide significant assistance in the region with community engagement on issues such as adoption of nuclear energy and transitioning from a coal and fossil fuel energy base. Such engagement can help bridge the gap between research and application of energy innovations in Southwest Virginia.

**Health and Behavioral Sciences:** The health and behavioral sciences sector in Central Appalachia is increasingly focused on addressing the region's significant health disparities through innovative research and targeted interventions. One key player is Ohio University's Institute to Advance Health Equity Science (ADVANCE), which was formerly known as the Appalachian Rural Health Institute.<sup>23</sup> This institute broadened its focus beyond rural health to examine local and global health equity issues. ADVANCE hopes to reduce health disparities by studying the impact of social factors on health outcomes, particularly in underserved populations in Appalachia. The institute supports interdisciplinary research across various academic departments by helping to promote collaborations and increase funding for health and social sciences research.



In addition, the Appalachian Regional Commission (ARC), a driving force behind research and initiatives, aims to improve health outcomes in the region. The ARC, along with partners like the Robert Wood Johnson Foundation, conducted studies to document health disparities and identify "Bright Spots" – communities within Appalachia that outperform expected health outcomes.<sup>24</sup> This research provides a foundation for developing programs that can be replicated across the region to address key health challenges. Other initiatives include the Consortium for Health Education in Appalachian Ohio at Ohio University, which focuses on improving access to healthcare and fostering collaboration between academic institutions and local communities.<sup>25</sup>

The Brain Institute and the Program in Fundamental Neuroscience at the University of Virginia offers strategic advantages for UVA Wise in this research space. Although brain health and disease share part of the disproportionate burden of behavioral and cognitive health concerns in rural communities, this is not a primary area of research at other institutions in Central Appalachia. In addition, Wrap Technologies has announced its intention to house research and development in its new facility in Southwest Virginia. The zones will be dedicated to R&D in augmented reality, virtual reality, and integrated public safety devices.<sup>26</sup> Research and development at UVA Wise in health and behavioral sciences could complement Wrap's strategy with evidence-based law enforcement practices, de-escalation tactics, and defensive techniques. Collaboration with researchers, scientists, biostatisticians, students, faculty, and clinical partners can potentially position UVA Wise as a regional and national leader in brain health and behavioral science in rural communities.

**Sustainable Climate Resilience:** The sustainable climate resilience sector in Central Appalachia is now a major focus for regional institutions, many of which are working to mitigate the impacts of climate change while promoting economic growth. Institutions like Appalachian State University, the University of Virginia, and the University of Pikeville lead efforts to develop strategies that address climate vulnerabilities and support regional resilience.

At Appalachian State University, the Pathways to Resilience initiative focuses on preparing climate-literate professionals across various fields.<sup>27</sup> The initiative emphasizes proactive climate action, equipping students with the knowledge and skills to address climate

<sup>23</sup> Ohio University. "About ADVANCE: Center for Intervention Research and Education." September 2024. <https://www.ohio.edu/chsp/advance/about>.

<sup>24</sup> Appalachian Regional Commission. "New Research and Website Highlight Health in Appalachia." July 24, 2018. <https://www.arc.gov/news/www-healthy-ky-org/>.

<sup>25</sup> Ohio University Heritage College of Osteopathic Medicine. "Consortium for Health Education." September 2024. <https://www.ohio.edu/medicine/about/offices/appalachia-health>.

<sup>26</sup> Wrap Technologies, "UPDATE – Wrap Technologies Launches Go-Forward Strategy, Advancing End-to-End Public Safety and Defense Solutions with New Virginia Facility." November 2024, <https://ir.wrap.com/news-events/press-releases/detail/328/update-wrap-technologies-launches-go-forward-strategy>.

<sup>27</sup> Appalachian State University. "What is 'Pathways to Resilience'?" September 2024. <https://resilience.appstate.edu/about/>.

challenges in ways that promote equity and resilience. Other universities take a more direct approach to climate resilience. Through its Environmental Institute, the University of Virginia established a Climate Collaborative on Clean Energy Transitions in Appalachia. The project focuses on leveraging renewable energy to enhance community resilience in under-resourced Appalachian regions.<sup>28</sup> This initiative partners with stakeholders, including wind, solar, and hydro developers, local policymakers, and community groups, to explore how renewable energy projects can contribute to economic development and resilience. The project involves a co-design model aimed at maximizing community benefits, such as job creation and new revenue streams, through renewable energy initiatives. UVA Wise is already a partner in this initiative and that work could be expanded.



Recent funding and research developments also significantly bolstered Central Appalachia's capacity to address climate resilience. The Invest Appalachia Fund recently produced a comprehensive climate analysis report that offers recommendations for proactive climate resilience in Appalachia.<sup>29</sup> Their research highlights the need for regional collaboration to address climate risks, including investment in clean energy, sustainable agriculture, and land management. The report also emphasizes the importance of building climate resilience into economic development strategies which ensure that communities are prepared for future climate-related challenges. In terms of funding, the University of Pikeville recently received a \$1.5 million grant from the Appalachian Regional Commission's POWER Initiative to support regional climate resilience efforts.<sup>30</sup> The grant funds projects that aim to build sustainable infrastructure, promote environmental health, and create job opportunities in sectors related to sustainability.

As with energy research, UVA Wise can further leverage the Environmental Institute (formerly the Environmental Resilience Institute) to support interdisciplinary research and training in sustainable solutions. Energy needs and resilience can work hand in hand to promote economic growth in Central Appalachia.

<sup>28</sup> University of Virginia. "Climate Collaborative: Appalachian Renewable Energy & Resilience and a Co-Designed Community Model." September 2023. <https://environment.virginia.edu/our-work/app-energy-resilience>.

<sup>29</sup> Invest Appalachia. "Climate Resilience in Central Appalachia: Impacts and Opportunities." May 2023. <https://investappalachia.org/climate-analysis/>.

<sup>30</sup> University of Pikeville. "UPIKE Receives \$1.5 Million Grant from Appalachian Regional Commission's POWER Initiative." October 20, 2022. <https://www.upike.edu/upike-receives-1-5-million-grant-from-appalachian-regional-commissions-power-initiative/>.

## 5. Research Center Feasibility

Establishing a research center at UVA Wise is an important step for both the college and the broader Appalachian region. As a regional hub of higher education, UVA Wise can play a significant role in driving economic development and innovation. This research center would focus on translating academic research and innovation into marketable products, services, and companies. Such an initiative can nurture local entrepreneurship, attract investment, and enhance workforce development in the region.

### Key Benefits and Gaps It Can Fill

1. **Bridging Academia and Industry:** UVA Wise demonstrates academic strengths that align with regional and industry needs, particularly in fields such as natural science (which could support continued energy research), health and behavioral sciences, and sustainable climate resilience. A research center would facilitate the transfer of research findings from these disciplines into practical applications, encouraging partnerships between faculty and local businesses.
2. **Economic Diversification:** A research and commercialization office can help with economic diversification by supporting the development of new industries, including technology, healthcare, renewable energy, and manufacturing. By supporting startups and local businesses in bringing innovative products to market, the center can help stimulate job growth and attract outside investment.
3. **Supporting Local Entrepreneurs:** Previous studies identified a gap in regional connectivity for entrepreneurs and funding to support growth. A research center could fill this gap by enhancing current business development services, including access to legal advice, mentoring, funding opportunities, and networking with potential investors. This approach can help entrepreneurs navigate the complexities of intellectual property protection and commercialization strategies.
4. **Addressing the "Brain Drain:"** Among more than 3,800 online resume profiles in Chmura's JobsEQ® platform, 84% of students from UVA Wise leave the region after graduation, likely in search of better job opportunities. A research center and commercialization office can help reverse this trend by creating local employment opportunities and encouraging graduates to stay and contribute to the regional economy. By supporting startups and a culture of innovation, the office can provide an environment where young professionals can thrive.

### Cost Considerations

The cost of establishing and operating a commercialization office at UVA Wise depends on several factors, including staffing, infrastructure, and program development. Below is an estimated breakdown of potential costs:

1. **Research Activity**
  - Support the research of scientists, post-doctoral fellows, graduate students, and 100+ undergraduate students with faculty mentors.
  - West Virginia University reported \$231 million in research expenditures for fiscal year 2023. Removing the 48% of research expenditures funded by the federal government, the university had about \$120 million in research expenditures. These funds came from state, industry, and private donors.<sup>31</sup> Research funding at this level may be considered a goal once the research center in Southwest Virginia is well established, but this comparison provides context for the kind of investment needed to stand out in Central Appalachia.
  - West Virginia University Innovation Corporation reported expenses of \$4.9 million plus \$1.5 million in salaries, other compensation, and employee benefits for fiscal year 2022.<sup>32</sup> Summed and adjusted for inflation, these expenses total nearly \$6.5 million.

**Total Research Activity Costs Range:** \$6.5 million to \$231 million (mix of federal, state, local, industry, private).

2. **Facilities and Infrastructure**

- Office space is required to support research activities. A facility adjacent to campus or potentially at the Oxbow Center may need a new space or renovations for meeting rooms and incubation spaces.

<sup>31</sup> West Virginia University. "WVU Breaks Record for Externally Supported Expenditures, Underscoring Research Commitment." August 24, 2023. <https://energy.wvu.edu/news/2023/08/24/wvu-breaks-record-for-externally-supported-expenditures-underscoring-research-commitment>.

<sup>32</sup> ProPublica Nonprofit Explorer, "West Virginia University Innovation Corporation Full text of "Full Filing" for fiscal year ending Dec. 2022." September 2024, <https://projects.propublica.org/nonprofits/organizations/611764272/202313199349306901/full>

- Depending on the research focus, there may be costs for specialized equipment for research, prototyping, or business development (e.g., computers, software).
- West Virginia University Innovation Corporation reported a value of \$58.5 million for land, building, and equipment in fiscal year 2022.<sup>33</sup>
- The University of Charleston in West Virginia received \$1.9 million in funding to create the UC Downtown Innovation Hub. The Hub co-locates a business with a business accelerator, coaching, advising, employee training, and community event space.<sup>34</sup>
- A successful research space could greatly expand the number of students, faculty, and staff in the community. A 2023 study on housing links to economic development reports UVA Wise currently faces difficulty recruiting faculty and staff because of housing. Recent mixed-use projects, such as The Ridges at Ohio University, report costs around \$314,000 per residential unit with commercial space.<sup>35</sup> At a similar rate, it could cost about \$47 million for approximately 150 units for graduate students, faculty, and staff and associated retail spaces that assist in attracting and retaining them in the region.

**Total Infrastructure Costs:** \$2 million to \$62 million for facility (dependent on expansion, renovation, or new construction) and \$47 million for supporting mixed-use development.

### 3. Program Development and Support

- **Entrepreneurship Training Programs:** Workshops, seminars, and mentorship programs for students, faculty, and local entrepreneurs can help fill knowledge gaps while encouraging networking. Annual cost: \$20,000–\$50,000.
- **Seed Funding:** To attract high-quality projects, the college might need to establish a small fund to provide seed capital to promising startups. Internal seed funding programs can also provide funding for researchers to initiate projects which can later be leveraged to secure external funding. Annual allocation: \$100,000–\$500,000, depending on available funding and partnerships.
- **Total Program Development Costs:** \$120,000 to \$550,000

### 4. Marketing and Outreach

- To attract interest from regional businesses, investors, and entrepreneurs, the research and commercialization center would need a marketing budget for events, promotions, and networking opportunities. Annual budget: \$30,000–\$75,000.

**Total Marketing Costs:** \$30,000 to \$75,000

**Total Potential Initial Costs: \$56M to \$341M**

**Total Potential Annual Costs: \$7M to \$232M**

Establishing a research center at UVA Wise holds great promise for closing the gap in research and innovation evident when compared with other parts of Central Appalachia. Additionally, the research center can address several regional challenges, including economic diversification, entrepreneurship support, and brain drain. The long-term benefits for the college and the region could quickly outweigh these initial costs, particularly if funding and resources can be secured from a variety of sources. The college can serve as a crucial anchor between academic research and the broader economy, helping to transform Southwest Virginia and cement UVA Wise as a center of innovation and opportunity in the Central Appalachian region.

<sup>33</sup> ProPublica Nonprofit Explorer, "West Virginia University Innovation Corporation Full text of "Full Filing" for fiscal year ending Dec. 2022." Accessed September 2024, <https://projects.propublica.org/nonprofits/organizations/611764272/202313199349306901/full>

<sup>34</sup> University of Charleston, "UC Receives \$1.9M Funding to create Innovation Hub," May 2022, Accessed September 2024, <https://www.ucwv.edu/2022/05/innovation-hub-funding/>

<sup>35</sup> Sheridan Hendrix, The Columbus Dispatch, "Ohio University partners to spend \$220 million on housing, mixed-use spaces at The Ridges," March 30, 2023, Accessed September 2024, <https://www.dispatch.com/story/news/education/2023/03/30/ohio-university-wants-to-spend-220-million-to-reimagine-the-ridges/69927041007>