

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):

5. Six-Year Pro Forma Calculations

Instructions: No new data needs to be added on this tab; it is entirely comprised by formulas. The top section pulls in data from the previous tabs to calculate a pro forma budget surplus/deficit for the 6 years. The following section calculates what T&F (price) and GF increases would theoretically need to occur each year in order to cover the deficit and maintain the 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. It does account for the salary/health insurance/VITA increases from tab 4, including the corresponding GF increases.

6. General Fund (GF) Request

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.

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.

7. Capital Requests

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.

8. Degree/Certificate Programs

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.

Enrollment/Degree Projections: Detailed six-year enrollment/degree projections are being collected through a separate process. These projections will be incorporated in the Six-Year Plan as part of the July and August institutional meetings with the Op Six.

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

Accessibility: All files need to be checked for accessibility prior to submitting them. Information on accessibility is provided at this link on SCHEV's website: <http://schev.edu/index/accessibility/creating-accessible-content>. The first link, "How to Make Your MS Office Documents Accessible" can be used to learn how to check documents. Only errors, not warnings, must be addressed.

Contacts for Questions:

General Questions - Grace Khattar (GraceKhattar@schev.edu)

Academic - Joe DeFilippo (joedefilippo@schev.edu)

Finance - Yan Zheng (yanzheng@schev.edu)

Financial Aid - Lee Andes (leeandes@schev.edu)

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

Legislative Reference:

§ 23.1 - 306. Institutional Six-Year Plans.

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

Institution UNITID:

Individual responsible for plan

Name(s) & Title(s):

Email address(es):

Telephone number(s):

Part 1: Undergraduate Tuition and Mandatory Fee Increase Plans in 2026-28 Biennium
Institution ID

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	\$8,960	\$9,220	2.9%	\$9,487	2.9%
In-State UG Mandatory E&G Fees	\$0	\$0	%	\$0	%
In-State UG Mandatory non-E&G Fees	\$7,290	\$7,647	4.9%	\$8,022	4.9%
In-State UG Total	\$16,250	\$16,867	3.8%	\$17,509	3.8%
Out-of-State UG Tuition	\$21,200	\$21,460	1.2%	\$21,736	1.3%
Out-of-State UG Mandatory E&G Fees	\$690	\$690	0.0%	\$690	0.0%
Out-of-State UG Mandatory non-E&G Fees	\$7,290	\$7,647	4.9%	\$8,022	4.9%
Out-of-State UG Total	\$29,180	\$29,797	2.1%	\$30,448	2.2%

**Part 2: Revenue: 2024-25 through 2031-32
Institution ID**

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 biennium, 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

**Part 2: Revenue: 2024-25 through 2031-32
Institution ID**

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.

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	\$21,570,786	\$22,665,221	5.1%	\$23,620,637	4.2%	\$22,611,600	-4.3%	\$22,003,885	-2.7%	\$21,447,768	-2.5%	\$21,447,768	0.0%	\$21,447,768	0.0%	\$21,447,768	0.0%	-1%	-0.1%
Undergraduate, Out-of-State	\$3,600,026	\$3,782,680	5.1%	\$4,004,151	5.9%	\$4,086,852	2.1%	\$4,334,958	6.1%	\$4,638,199	7.0%	\$4,638,199	0.0%	\$4,638,199	0.0%	\$4,638,199	0.0%	29%	3.7%
Graduate, In-State	\$6,207,088	\$6,522,017	5.1%	\$7,109,934	9.0%	\$7,421,176	4.4%	\$7,537,891	1.6%	\$7,674,060	1.8%	\$7,674,060	0.0%	\$7,674,060	0.0%	\$7,674,060	0.0%	24%	3.1%
Graduate, Out-of-State	\$1,999,919	\$2,101,388	5.1%	\$2,567,765	22.2%	\$2,838,056	10.5%	\$2,856,485	0.6%	\$2,874,914	0.6%	\$2,874,914	0.0%	\$2,874,914	0.0%	\$2,874,914	0.0%	44%	5.3%
Law, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Law, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Medicine, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Medicine, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Dentistry, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Dentistry, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
PharmD, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
PharmD, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Veterinary Medicine, In-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Veterinary Medicine, Out-of-State	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
First Professional, In-State (Total)	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
First Professional, Out-of-State (Total)	\$0	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	\$0	%	%	%
Other NGF	\$2,048,443	\$2,152,364	5.1%	\$2,214,783	2.9%	\$2,279,011	2.9%	\$2,279,011	0.0%	\$2,279,011	0.0%	\$2,279,011	0.0%	\$2,279,011	0.0%	\$2,279,011	0.0%	11%	1.5%
Total E&G NGF Revenue	\$35,426,262	\$37,223,670	5.1%	\$39,517,269	6.2%	\$39,236,696	-0.7%	\$39,012,231	-0.6%	\$38,913,952	-0.3%	\$38,913,952	0.0%	\$38,913,952	0.0%	\$38,913,952	0.0%	10%	1.4%
E&G GF Revenue (assume flat after 2026)	\$52,118,074	\$52,110,034	0.0%	\$52,110,034	0.0%	\$52,110,034	0.0%	\$52,110,034	0.0%	\$52,110,034	0.0%	\$52,110,034	0.0%	\$52,110,034	0.0%	\$52,110,034	0.0%	0%	0.0%
E&G Tuition Offset Waiver	\$1,431,300	\$1,222,000	-14.6%	\$1,222,000	0.0%	\$1,222,000	0.0%	\$1,222,000	0.0%	\$1,222,000	0.0%	\$1,222,000	0.0%	\$1,222,000	0.0%	\$1,222,000	0.0%	-15%	-2.2%
Total E&G Revenue	\$88,975,636	\$90,555,704	1.8%	\$92,849,303	2.5%	\$92,568,730	-0.3%	\$91,122,265	-1.6%	\$91,023,966	-0.1%	\$91,023,966	0.0%	\$91,023,966	0.0%	\$91,023,966	0.0%	2%	0.3%

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	\$19,279,232	\$20,627,923	7.0%	\$21,638,691	4.9%	\$22,698,987	4.9%	
All Other students	\$1,023,344	\$1,094,933	7.0%	\$1,148,585	4.9%	\$1,204,865	4.9%	
Total non-E&G fee revenue	\$20,302,576	\$21,722,856	7.0%	\$22,787,276	4.9%	\$23,903,852	4.9%	
Total Auxiliary Revenue	\$57,200,715	\$60,978,209	6.6%	\$62,042,629	1.7%	\$63,159,206	1.8%	

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

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	\$21,570,786	\$2,736,948	12.7%	\$2,736,948	\$3,435,735	\$19,942	\$25,026,463	24.7%	\$0 Compliant
Undergraduate, Out-of-State	\$3,600,026	\$264,886	7.4%	\$264,886	\$532,639	\$0	\$4,132,665	19.3%	
Graduate, In-State	\$6,207,088	\$323	0.0%	\$323	\$0	\$39,349	\$6,246,437	0.6%	
Graduate, Out-of-State	\$1,999,919	\$0	%	\$0	\$0	\$0	\$1,999,919	0.0%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$33,377,819	\$3,002,157	9.0%	\$3,002,157	\$3,968,374	\$59,291	\$37,405,484	18.8%	

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	\$22,665,221	\$2,730,430	12.0%	\$2,730,430	\$3,401,378	\$21,936	\$26,088,535	23.6%	\$0 Compliant
Undergraduate, Out-of-State	\$3,782,680	\$264,886	7.0%	\$264,886	\$527,313	\$0	\$4,309,993	18.4%	
Graduate, In-State	\$6,522,017	\$323	0.0%	\$323	\$0	\$39,349	\$6,561,366	0.6%	
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	\$32,969,921	\$2,995,639	9.1%	\$2,995,639	\$3,928,690	\$61,285	\$36,959,896	18.9%	

Allocation of Tuition Revenue Used for Student Financial Aid

2026-27 (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	\$23,620,637	\$2,730,430	11.6%	\$2,730,430	\$3,367,364	\$24,130	\$27,012,131	22.7%	\$0 Compliant
Undergraduate, Out-of-State	\$4,004,151	\$264,886	6.6%	\$264,886	\$522,039	\$0	\$4,526,190	17.4%	
Graduate, In-State	\$7,109,934	\$323	0.0%	\$323	\$0	\$39,349	\$7,149,283	0.6%	
Graduate, Out-of-State	\$2,567,765	\$0	%	\$0	\$0	\$0	\$2,567,765	0.0%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$156,316,117	\$2,995,639	1.9%	\$2,995,639	\$3,889,403	\$63,479	\$41,255,369	16.8%	

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	\$22,611,600	\$2,730,430	12.1%	\$2,730,430	\$3,333,690	\$26,543	\$25,971,833	23.5%	\$0 Compliant
Undergraduate, Out-of-State	\$4,086,852	\$264,886	6.5%	\$264,886	\$516,819	\$0	\$4,603,672	17.0%	
Graduate, In-State	\$7,421,176	\$323	0.0%	\$323	\$0	\$39,349	\$7,460,525	0.5%	
Graduate, Out-of-State	\$2,838,056	\$0	%	\$0	\$0	\$0	\$2,838,056	0.0%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$36,957,685	\$2,995,639	8.1%	\$2,995,639	\$3,850,509	\$65,892	\$40,874,086	16.9%	

2028-29 (Pro Forma)									
T&F Used for Financial Aid	Total Tuition Revenue	Tuition Revenue for Financial Aid (Program 108)	% Revenue for Financial Aid	Distribution of Financial Aid	Unfunded Scholarships	Other Tuition Discounts and Waivers	Gross Tuition Revenue (Cols. B+F+G)	Discount Rate (Cols. (C+F+G)/H)	Compliance with § 4-5.1.a.i
Undergraduate, In-State	\$22,003,885	\$2,730,430	12.4%	\$2,730,430	\$3,300,353	\$26,543	\$25,330,781	23.9%	\$0 Compliant
Undergraduate, Out-of-State	\$4,334,958	\$264,886	6.1%	\$264,886	\$511,651	\$0	\$4,846,609	16.0%	
Graduate, In-State	\$7,537,891	\$323	0.0%	\$323	\$0	\$39,349	\$7,577,240	0.5%	
Graduate, Out-of-State	\$2,856,485	\$0	%	\$0	\$0	\$0	\$2,856,485	0.0%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$36,733,220	\$2,995,639	8.2%	\$2,995,639	\$3,812,004	\$65,892	\$40,611,116	16.9%	

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	\$21,447,768	\$2,730,430	12.7%	\$2,730,430	\$3,267,350	\$26,543	\$24,741,661	24.3%	\$0 Compliant
Undergraduate, Out-of-State	\$4,638,199	\$264,886	5.7%	\$264,886	\$506,534	\$0	\$5,144,733	15.0%	
Graduate, In-State	\$7,674,060	\$323	0.0%	\$323	\$0	\$39,349	\$7,713,409	0.5%	
Graduate, Out-of-State	\$2,874,914	\$0	%	\$0	\$0	\$0	\$2,874,914	0.0%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$36,634,940	\$2,995,639	8.2%	\$2,995,639	\$3,773,884	\$65,892	\$40,474,716	16.9%	

2030-31 (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	\$21,447,768	\$2,730,430	12.7%	\$2,730,430	\$3,234,676	\$26,543	\$24,708,987	24.2%	\$0 Compliant
Undergraduate, Out-of-State	\$4,638,199	\$264,886	5.7%	\$264,886	\$501,469	\$0	\$5,139,668	14.9%	
Graduate, In-State	\$7,674,060	\$323	0.0%	\$323	\$0	\$39,349	\$7,713,409	0.5%	
Graduate, Out-of-State	\$2,874,914	\$0	%	\$0	\$0	\$0	\$2,874,914	0.0%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$36,634,940	\$2,995,639	8.2%	\$2,995,639	\$3,736,145	\$65,892	\$40,436,977	16.8%	

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
Undergraduate, In-State	\$21,447,768	\$2,730,430	12.7%	\$2,730,430	\$3,202,330	\$26,543	\$24,676,640	24.1%	\$0 Compliant
Undergraduate, Out-of-State	\$4,638,199	\$264,886	5.7%	\$264,886	\$496,454	\$0	\$5,134,653	14.8%	
Graduate, In-State	\$7,674,060	\$323	0.0%	\$323	\$0	\$39,349	\$7,713,409	0.5%	
Graduate, Out-of-State	\$2,874,914	\$0	%	\$0	\$0	\$0	\$2,874,914	0.0%	
First Professional, In-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
First Professional, Out-of-State	\$0	\$0	%	\$0	\$0	\$0	\$0	%	
Total	\$36,634,940	\$2,995,639	8.2%	\$2,995,639	\$3,698,784	\$65,892	\$40,399,616	16.7%	

* 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
Institution ID

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 biennium and 2030-2032 biennium, total amounts should be provided as estimates of future expenditures on these items but delineation of reallocation vs. tuition revenue vs. GF does not need to be provided by the institution.

Funding amounts shall assume an annual 2% salary increase for each year from 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 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.

Please estimate total E&G expenditures for 2024-25 and 2025-26	
Total Estimated 2024-25 E&G Expenditures	\$87,550,625
Total Estimated 2025-26 E&G Expenditures	\$90,739,347

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)				
Salary & benefit increases for existing employees														
2% annual state salary increase cost		\$1,158,707	\$0	\$491,745	\$666,962	\$2,340,587	\$0	\$993,326	\$1,347,261	\$3,546,105	\$4,775,434	\$6,029,955	\$7,309,261	2% Salary Increase
1% annual state health insurance increase cost		\$112,164	\$0	\$59,165	\$52,999	\$224,328	\$0	\$118,334	\$105,994	\$338,824	\$454,465	\$571,263	\$689,228	1% Health Insurance Increase
[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	
Inflationary non-personnel cost increases														
Contractual services		\$2,894,373	\$1,214,259	\$1,680,114	\$0	\$6,082,564	\$5,308,226	\$774,338	\$0	\$9,594,084	\$13,461,404	\$17,720,243	\$22,409,896	10% Contractual Services Increase
Utilities		\$62,575	\$0	\$62,575	\$0	\$127,028	\$0	\$127,028	\$0	\$193,414	\$261,792	\$332,221	\$404,762	3% Utility Increase
[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	
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
Institution ID

Short Title	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)	Total Amount	Reallocation	Amount from Tuition Revenue	Amount from GF (Salaries & benefits)	Total Amount (Pro Forma)				
New/expanded academic programs													
Growth in communication sciences and disorders	\$100,000	\$100,000	\$0	\$0	\$104,000	\$104,000	\$0	\$0	\$108,160	\$112,486	\$116,985	\$121,666	Expansion of clinical support and opportunities. See sections A3, B1, and C4.
Growth in undergraduate nursing program and establishment of accelerated bachelor's degree in nursing	\$200,000	\$200,000	\$0	\$0	\$208,000	\$208,000	\$0	\$0	\$216,320	\$224,972	\$233,971	\$243,330	Expansion of laboratory support and establishment of accelerated bachelor's of nursing degree pathway. See sections A3, B1, and C4.
Establishment of data science program	\$120,563	\$120,563	\$0	\$0	\$27,000	\$27,000	\$0	\$0	\$27,000	\$27,000	\$27,000	\$27,000	Faculty position in a new degree pathway. See sections A3 and C4.
Establishment of information technology program	\$263,563	\$263,563	\$0	\$0	\$271,469	\$271,469	\$0	\$0	\$279,613	\$288,002	\$296,642	\$305,541	Faculty position and equipment in a new degree pathway. See sections A3 and C4.
Expansion of Teacher Preparation initiatives	\$200,000	\$200,000	\$0	\$0	\$200,000	\$200,000	\$0	\$0	\$200,000	\$200,000	\$200,000	\$200,000	See sections A3, C4, and I1.
Other academic & student support strategies & initiatives													
Post Graduation Success Initiative	\$112,000	\$112,000	\$0	\$0	\$114,760	\$114,760	\$0	\$0	\$97,602	\$100,530	\$103,546	\$106,653	Support for coordination of career and micro-internship, and support for initiative to infuse life and career preparation more directly into academic advising and coaching. See sections A2, A3, B1, and C4.
Mental Health	\$240,292	\$240,292	\$0	\$0	\$243,985	\$243,985	\$0	\$0	\$247,748	\$251,580	\$255,480	\$259,455	Expands the Resident Counselor program with a second position, extends our after-hours mental health hotline Protocol, extending our Trauma-informed counselor position.
Early Alert/Student Support Management	\$177,500	\$177,500	\$0	\$0	\$275,000	\$275,000	\$0	\$0	\$372,500	\$470,000	\$470,000	\$470,000	See section C1 and C2.
Improved Retention Data Initiative	\$15,000	\$15,000	\$0	\$0	\$20,000	\$20,000	\$0	\$0	\$25,000	\$30,000	\$30,000	\$30,000	See sections A2, B2, and C1.
[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	\$5,656,737	\$2,643,177	\$2,293,599	\$719,961	\$10,238,721	\$6,772,440	\$2,013,026	\$1,453,255	\$15,246,370	\$20,657,665	\$26,387,306	\$32,576,791	

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	\$0

Part 5: Six-year Pro Forma Calculations: 2024-25 through 2031-32
Institution ID

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.

Baseline Pro Forma Surplus/Deficit	From FY25-FY32										
	2024-2025 (Actual)	2025-2026 (Est.)	Chg	2026-2027 (Est.)	Chg	2027-2028 (Plan)	Chg	2028-2029	Chg	Total Chg	Avg Annual Chg
Total E&G GF Revenue from Tab2, flat after 2027-28	53,549,374	53,332,034	0%	54,051,995	1%	54,785,289	1%	53,332,034	-3%	0%	0%
Tuition discount rate	18.8%	18.9%	0.1%	16.8%	-2.1%	16.9%	0.1%	16.9%	0.0%	-11%	-2%
Total E&G NGF Revenue	35,426,262	37,223,670	5%	39,517,269	6%	39,236,696	-1%	39,012,231	-1%	10%	1%
Incremental E&G NGF Revenue vs. prior yr	1,797,408	1,797,408	%	2,293,599	28%	(280,573)	-112%	(224,465)	-20%	-100%	-14%
Total E&G Revenue	88,975,636	90,555,704	2%	93,569,264	3%	94,021,985	0%	92,344,265	-2%	2%	0%
Implied GF % of E&G	60.2%	58.9%	-1.3%	57.8%	-1.1%	58.3%	0.5%	57.8%	-0.5%	-2%	0%
Total E&G Expenditures	87,550,625	90,739,347	4%	93,752,907	3%	94,205,628	0%	99,213,277	5%	33%	5%
Incremental E&G Expenditures vs. 2025-26				5,656,737		10,238,721	81%	15,246,370	49%	476%	68%
Reallocation of existing dollars (flat after 2027-28)				2,643,177		6,772,440	156%	6,772,440		156%	22%
Pro Forma Surplus/Deficit	1,425,011	(183,643)	-113%	(183,643)	0%	(183,643)	0%	(6,869,012)	3640%	13131%	1876%
Incremental Surplus/Deficit	1,425,011	(1,608,654)	-213%	(0)	-100%	0	-999%	(6,685,370)	#####	12468780336%	1781254334%

What would a constant GF/NGF ratio at 2025-26 levels imply for T&F and GF increases?											
	2024-2025 (Actual)	2025-2026 (Est.)	Chg	2026-2027	Chg	2027-2028	Chg	2028-2029	Chg	Total Chg	Avg Annual Chg
GF % of E&G	60.2%	60.2%	0%	60.2%	0%	60.2%	0%	60.2%	0.0%	0%	0%
Implied incremental T&F increase (%)	-1.6%	1.7%	-207%	0.0%	-100%	0.0%	-1005%	6.8%	6.8%	268%	38%
Implied incremental GF Increase (%)	-1.6%	1.8%	-213.3%	0.0%	-100.0%	0.0%	-987.0%	7.5%	7.5%	284.8%	41%

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	Total Chg	Avg Annual Chg
Implied E&G Expenditure Reduction (%)	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%	%	%	%
Implied incremental GF Increase (%)	0.0%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	%	%
Implied GF % of E&G	60.2%	58.9%	-2.1%	57.8%	-1.9%	58.3%	0.9%	57.8%	-0.9%	-1.8%	0%

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

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 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.

Priority Ranking	Initiatives Requiring General Fund Support						Notes/Explanation Please be brief; reference specific narrative question for more detail.
	Strategies (Match Academic-Financial Worksheet Short Title)	Category (Select best option from dropdown menu)	Biennium 2026-2028 (7/1/26-6/30/28)				
			2026-2027		2027-2028		
			Total Amount	GF Support	Total Amount	GF Support	
	Access and Affordability	General Operations Support	\$2,200,863	\$2,200,863	\$3,194,926	\$3,194,926	This request would continue the operational support included in the FY25 budget and would help the University limit in-state undergraduate tuition increases by addressing increased costs resulting from inflation and state-mandated salary and benefit increases.
	VMSDEP Support	General Operations Support	\$415,242	\$415,242	\$654,501	\$654,501	State support is being requested for the Virginia Military Survivors' and Dependents' Education Program (VMSDEP). The program has seen substantial growth in recent years and is projected to continue expanding. The requested funding reflects the estimated increase in foregone revenue for FY27 and FY28. This estimate does not account for any base or one-time general fund offsets for VMSDEP that may be provided by the State Council of Higher Education for Virginia. The university remains committed to working in partnership with the Commonwealth to strengthen the long-term sustainability of this essential program.
	Increase Financial Aid	Financial Aid	\$351,000	\$351,000	\$351,000	\$351,000	This request would continue the funding for additional undergraduate need-based financial aid that was included in the FY25 budget. Pell-eligible students now make up 33.4% of our undergraduate student population, up from 26.4% in 2022.
	Allied Health	Degree Pathways	\$300,000	\$300,000	\$300,000	\$300,000	Current limitations on our ability to meet high demand for degrees in Nursing and Communication Sciences and Disorders include the ability to offer competitive faculty salaries (B1) and the need for additional clinical and laboratory staff (C4). Funding would address both of these limitations and allow us to enroll more students in these high-growth fields.
	Teacher Prep	Degree Pathways	\$200,000	\$200,000	\$200,000	\$200,000	Funding would support the expansion of initiatives to strengthen the pipeline of teacher recruitment and to support alternate pathways to licensure programs, such as the Provisional Licensure Completion Initiative and Teacher Apprenticeship Program, in partnership with K-12 school systems and community college partners.
	Student Mental Health	Student Success	\$240,292	\$120,000	\$243,985	\$120,000	Funding would support continuation of Longwood's trauma-informed counselor program, expand resident counselor program, and extend after-hours mental health care hotline service.
			\$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	
			\$3,707,397	\$3,587,105	\$4,944,412	\$4,820,427	

**Part 7: E&G Capital Requests in 2026-2028 Biennium
Institution ID**

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	Replace Roof, Windows, and Doors Lankford Hall	Maintenance Reserve	1.27 (as of 6/29/18)	\$4,160,000	\$0	\$4,160,000	\$0	\$0	\$0	This is a resubmittal of a 2024 CPR included in the final 2026-2028 capital project pool that was vetoed by the Governor in May 2025. Replace the building's roof, windows, and exterior doors. Justification: Windows and doors are original (1967), have deteriorated severely, and cannot be economically repaired; roof is beyond expected life and leaks in several areas. Alternatives: Delay the work or perform it in multiple phases; neither is an efficient or economical way to address the entire requirement. No enrollment growth is expected. No additional funding sources are anticipated.
2	Renovate Greenwood Library Building	Improvements-Other	0.45 (as of 6/29/18)	\$67,400,000	\$0	\$67,400,000	\$0	\$0	\$0	Renovate the existing building. Justification: Opened in 1990 and has never been renovated; all systems are beyond service life and inadequate; internal space will be reconfigured to support current student learning requirements. Alternatives: Delay the work or perform it in multiple phases; neither is an efficient or economical way to address the entire requirement. No enrollment growth is expected. No additional funding sources are anticipated.
3	Replace and Renovate Building Systems Coyner Hall	Improvements-Infrastructure Repairs	1.08 (as of 6/29/18)	\$6,100,000	\$0	\$6,100,000	\$0	\$0	\$0	Replace or renovate numerous building operating systems, structural elements, and internal finishes; attain ADA compliance throughout. Justification: Opened in 1972 and has not had a complete renovation; all systems are beyond service life and inadequate. Alternatives: Delay the work or perform it in multiple phases; neither is an efficient or economical way to address the entire requirement. No enrollment growth is expected. No additional funding sources are anticipated.
4	Improve Public Safety, External ADA Access, and Campus Infrastructure Efficiency	Improvements-Other	not applicable	\$7,900,000	\$0	\$7,900,000	\$0	\$0	\$0	A comprehensive campus-wide project that will address ADA shortfalls in areas outside buildings; demolish vacant and hazardous buildings; improve personnel safety; reduce building operating costs; improve stormwater management; and enhance functionality and useability of key campus open spaces and external features. Justification: Eliminate impediments to ADA access; improve safety in exterior areas; increase building operating efficiencies and reduce costs. Alternatives: Delay the work or perform it in multiple phases; neither is an efficient or economical way to address the entire requirement. No enrollment growth is expected. No additional funding sources are anticipated.
5	Replace Roof and Roof-Mounted Air Handler Units Chichester Science Center	Maintenance Reserve	0.04 (as of 6/29/18)	\$4,000,000	\$0	\$4,000,000	\$0	\$0	\$0	Replace the roof, four roof-mounted air handler units, and four fume hood exhaust fans. Justification: Air handler units are original (2005) and have deteriorated significantly, resulting in serious water leaks in multiple areas of the top floor (several classrooms cannot be used); a roof engineering survey and testing discovered large areas of deterioration and excess moisture. Alternatives: Delay the work or perform it in multiple phases; neither is an efficient or economical way to address the entire requirement. No enrollment growth is expected. No additional funding sources are anticipated.

6	Replace and Repair Building Systems in Five Campus Non-General Fund Buildings	Improvements-Infrastructure Repairs	not available	\$11,500,000	\$11,500,000	\$0	\$0	\$0	\$0	Replace or renovate numerous building operating systems, structural elements, and safety systems; attain ADA compliance in these buildings. Justification: Various systems and structural elements in each of these buildings are beyond expected life, severely deteriorated, malfunctioning, or beyond economical repair. Alternatives: Delay the work or perform it in multiple phases; neither is an efficient or economical way to address the entire requirement. No enrollment growth is expected. No additional funding sources are anticipated.
7	Replace and Renovate Building Systems Hiner Hall	Maintenance Reserve	0.14 (as of 6/29/18)	\$0	\$0	\$0	\$5,600,000	\$0	\$5,600,000	Replace or renovate numerous building operating systems, structural elements, and internal finishes; attain ADA compliance throughout the building. Justification: Most recently renovated in 1998 and has not had significant updates since--several major systems are beyond expected life and inadequate; space configurations and FFE do not support current student learning requirements. Alternatives: Delay the work or perform it in multiple phases; neither is an efficient or economical way to address the entire requirement. No enrollment growth is expected. No additional funding sources are anticipated.
8	Repair or Replace Roof and Exterior Building Components Rotunda Hall	Maintenance Reserve	0.10 (as of 6/29/18)	\$0	\$0	\$0	\$6,600,000	\$0	\$6,600,000	Replace or repair sections of the building's roof, external woodwork, and columns. Justification: Sections of the roof and external structural elements are showing signs of deterioration and should be replaced. Alternatives: Delay the work or perform it in multiple phases; neither is an efficient or economical way to address the entire requirement. No enrollment growth is expected. No additional funding sources are anticipated.
				\$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	
				\$101,060,000	\$11,500,000	\$89,560,000	\$12,200,000	\$0	\$12,200,000	

**Part 8: Degree/Certificate Programs in 2026-2028 Biennium
Institution ID**

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)
Bachelor of Science	Data Science	Establish	30.7001	Fall 2026	Longwood anticipates a new faculty hire will be needed to support the program if the anticipated student demand is achieved.
Master of Science	Information Technology	Establish	11.0103	Fall 2026	To support both the master's and bachelor degrees, Longwood anticipates one new faculty hire.
Bachelor of Science	Nursing	Grow	51.3801	Summer 2027	Longwood plans to launch an accelerated bachelor of science in nursing program geared for working professionals. We anticipate the need for additional support staff to continue to grow the program to meet demand.
Bachelor of Science	Information Technology	Establish	11.0103	Fall 2027	Longwood anticipates equipment costs to ensure that the program is using the most up-to-date technology to support student achievement and preparation.

2025 SIX-YEAR PLAN NARRATIVE (Part II)

INSTITUTION: Longwood University

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.

Longwood's mission statement was first approved by the Board of Visitors in 1997, and reads: "Longwood University is an institution of higher learning dedicated to the development of citizen leaders who are prepared to make positive contributions to the common good of society. Building upon its strong foundation in the liberal arts and sciences, the University provides an environment in which exceptional teaching fosters student learning, scholarship, and achievement. As the only four-year public institution in south central Virginia, Longwood University serves as a catalyst for regional prosperity and advancement." It has been reaffirmed several times, and we do not anticipate changing it.

The University's strategic plan goals support the goals of the mission through a strong focus on enrollment and innovation across the curricula; enhancing strong relationships with the town of Farmville, Prince Edward County, and surrounding region; increasing philanthropic giving to support University initiatives; and achieving distinction, both academically and athletically, in the Commonwealth and beyond – all of which develop the skills of both citizenship and leadership in our students on our residential liberal arts campus.

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?

Strengths

A consistent producer of Virginia workforce talent – particularly in high-growth fields

Longwood has historically drawn more than 90 percent of its students from Virginia and has increased over the last ten years its share of students graduating from programs aligned with high-growth, high-need occupations in our Commonwealth. Currently, two-thirds of our graduates earn their undergraduate degree in a program aligned with a priority occupation for Virginia.

Long-Term Virginia Workforce Retention

A 2022 report by the National Bureau of Economic research found that Virginia's retention of post-graduate talent is declining. Data by the U.S. Census Bureau reveals that on average just 58% of Virginia college graduates are living and working in the Commonwealth ten years after their undergraduate education. The "brain drain" is especially concerning for the Commonwealth's tech corridors and will have net negative impacts on Virginia's ability to attract high-value employers in the future.

Longwood, by contrast, has the highest percentage of all Virginia public institutions of higher education of graduates living and working in Virginia ten years post-graduation, at 83 percent. More

than half of all Virginia publics have an in-state workforce retention rate below 70%, and four have rates under 50% over that time frame.

Long-Term Workforce Retention
Percentage of Graduates Living and Working in Virginia

	5 Years Post- Graduation	10 Years Post- Graduation
Longwood University (Highest)	89%	83%
Mean Va. 4-year public	69%	64%
Median Va. 4-year public	73%	69%
Minimum Va. 4-year public	44%	38%

Source: U.S. Census Bureau Post-Secondary Employment Outcomes

Longwood is producing graduates who stay in Virginia, contributing to the economy and civic life of the Commonwealth.

Programmatic Investments and Growth Aligned with Priority Occupations

As discussed in detail throughout our six-year plan, an increasing number (more than two-thirds) of our graduates enter the workforce in high-growth, high-need occupations critical to the long-term health of the Commonwealth, particularly in these three areas:

- **Nursing.** Our nursing program has grown steadily, and this fall will enroll 97 future nurses in the new cohort (up from 37 in 2012) and is consistently ranked among the top programs in Virginia based on licensure pass rates.
- **Education.** Longwood is the only four-year public institution serving Southside Virginia, and with our historic roots in teacher preparation, has long been a producer of educators who live and work in Virginia. While the profession faces significant challenges nationally, Longwood continues to produce a substantial share of graduates prepared to enter the classroom.
- **Business.** Growth in our College of Business and Economics, along with strategic investments and community partnerships that support entrepreneurship, helps meet demand for one of the largest areas of need in the Commonwealth.

Access and Support For Low-Income and First-Generation Students

Longwood’s faculty are primarily teaching faculty, and we have the highest number of classes taught by full-time professors among public universities in the Commonwealth. This translates into among the highest rates of students who say they had faculty mentors who helped them persist toward graduation. This is particularly important for students who are Pell-eligible or first-generation college students – who are more at-risk of not completing their four-year degree. Longwood’s commitment to small classes taught by full-time faculty is a core strength that has been augmented by the following (discussed in detail throughout):

- **A university-wide commitment to retention.** A President’s Task Force on Retention in recent years produced recommendations – most of which are currently being implemented – that emphasizes structural support systems that affect retention and on-time graduation rates.

- **Pell Initiatives.** State support for efforts aimed at affordability and access for Pell-eligible families has increased that population at Longwood through partnerships in Southside and Southwest Virginia, scholarships, student support positions, early access and transition programs, and early intervention efforts for struggling students.
- **Philanthropy.** Longwood’s highest philanthropic priorities are scholarships – particularly need-based – that improve access and affordability for these at-risk populations.

Longwood’s commitment to access and support for at-risk populations has led to more students enrolling, persisting to graduation, and graduating on-time in recent years.

- **Recognition as a top performer on social mobility.** With a 55% 6-year graduation rate among Pell-eligible students, U.S. News has ranked Longwood for several years on its “Top Performers on Social Mobility” list among public universities in the South. In Fact Pack Data, Chart C in the Post-Completion section, Longwood shows an upward trend in median income for Pell students and an increasing number of upwardly mobile graduates.
- **A growing Pell-eligible population.** With increased support from the state that helped increase awards, we are able to guarantee need-based scholarship funding for four years for students receiving Pell grants, provided they stay in good academic standing. Our Pell population has shown steady increases over the last three years: 276 students in the Fall 2024 cohort (33.4%) were Pell recipients, compared with 210 (26.4%) in Fall 2022.
- **Pell-eligible retention rates aligned with overall university rate.** In the 2024-25 academic year, our Pell-eligible student population retained at 79.1%, a rate that is aligned with our overall retention rate (80.1%), in part due to significant support of our wraparound support services through Pell Initiative funding.
- **Improving first-generation retention rates.** First-generation students overall retained at 76.3% in the 2024-25 academic year. Work is ongoing to align this number with the Pell-eligible population and overall Longwood student base.
- **Six-year graduation rates.** While six-year graduation rates have held steady for the cohorts who have moved through to graduation, the impact of the covid pandemic on the 2018 cohort – in particular in the Pell-eligible, first-generation subset, was felt strongly. We feel that this supports a Parent Engagement Coordinator position which will help parents navigate challenges, creating more connections, understanding, and support for students.

Controlled Costs and Tuition

Longwood has been a leader over the last 12 years in keeping tuition increases among the very lowest in the Commonwealth. Sound management, stable leadership, disciplined hiring practices, conservative financial models, and increases in philanthropy – particularly in the wake of the covid pandemic – have improved affordability and led to a decrease in net price and student borrowing rates (discussed below). We have shown discipline in hiring, keeping our employee-to-FTE ratio flat throughout a period of declining enrollment (2019-21) – during which our employee numbers have also decreased -- and as enrollment stabilized over the last three years.

Longwood offers 30 undergraduate degree programs and six graduate programs, with sustainable growth (See C4). We plan to add programs that we believe will have a positive effect on enrollment and address workforce demands in the Commonwealth (See C4), and have shown a willingness to close and teach out programs with insufficient demand.

Financial Stability

With the support of the Commonwealth, increases in philanthropy, and careful management, the net position of the University and its component units has increased from \$232,830,154 in Fiscal Year 2018-19 (the fiscal year concluded prior to the onset of covid) to \$283,716,756 for Fiscal Year 2023-24, an increase of \$50,886,602. We expect the fiscal year just concluded to underscore strong results, and that audited financials for Fiscal Year 2024-25 will reflect net position to have increased by a further 10% or more over the prior year.

Teaching at Our Core

As noted above, a core strength of Longwood's is its faculty commitment to teaching. Research is encouraged and supported, but the primary job of our faculty is in the classroom. We continue to invest in full-time faculty positions who work in the classroom, because we believe strongly that results in enthusiasm among students and graduates (65% of whom report they had a mentor in college – the second-highest rate in the state in a SCHEV study), improved retention and on-time graduation outcomes, and deeper connections to Virginia among students and graduates, where most of them enter and stay in the workforce.

Civitae Core Curriculum

Longwood's distinctive general education curriculum, Civitae, combines training for critical workforce skills (collaboration, strong writing and communication skills, data literacy, broad perspectives and adept interdisciplinary thought) with an emphasis on the same skills used in the service of citizenship. All undergraduate students take Civitae, building these skills not only in the first two years of college before moving onto major-focused coursework, but throughout their four-year study career. We believe there is a distinctive benefit to this approach: students practice the skills they will use in the workforce and in their lives throughout their undergraduate years as they prepare to make contributions to the common good both civically and professionally. Civitae is distinctive and important, and students recognize its impact. Mara Beck '25, who graduated this spring with a degree in communication studies, said:

Civitae has shaped my education for the better. I have taken classes in college I never would have imagined, and have had the opportunity to learn about more than just the field I am studying. It's one thing to learn the material, but it's another to understand its application and imagine the societal implications of what we learn. Civitae does it all.

Stable, Experienced Leadership

President Taylor Reveley has led Longwood for 12 years, one of the longest tenures in the state, which has allowed Longwood to have remarkable consistency through periods of challenge and take advantage of opportunities when they arise. He is supported by a core leadership team of veteran educators and administrators: the average tenure of a vice president at Longwood is 15 years at the institution.

A Community Partner, Economic Base, and Cultural Hub

Longwood is not only the largest employer in Prince Edward County, but is an important community partner in cultural and economic impact. The university is proud to partner on a range of community initiatives as well as providing concerts, art exhibitions, and sporting events that routinely draw thousands of community members to campus each year. As the only four-year public institution in the region, we draw strength from our deep relationships with Farmville, Prince Edward, and the surrounding area.

An Enthusiastic Alumni Base

Longwood has among the very highest alumni satisfaction rates among Virginia publics – at 91% in a SCHEV study. This enthusiasm has led to engagement on a number of levels, from internship and job-shadowing initiatives that connect alumni in the Virginia workforce with students in those fields, to increased philanthropy that supports current and future generations of Longwood students. Longwood alumni have long held important positions in Commonwealth schools, hospitals, public service professions, and business, and are poised, through a strong network that supports students and the university, to continue that path. In 2024, Longwood launched internship and experiential learning initiatives with funding from V-TOP to expand the availability of work-based experiences available to Longwood students (<https://www.longwood.edu/news/2024/grants-awarded-support-internships-career-success/>).

Momentum Headed Into Our Third Century

Longwood is the third-oldest public university in the Commonwealth and one of the nation’s hundred-oldest, public or private, and over that 186-year history has adapted to major societal and economic shifts with a central mission of producing graduates to serve the common good. From the Civil War, where the campus witnessed fighting, to the Civil Rights Movement, which has deep roots in our community that are commemorated and taught today, and through periods of shifting economic pressures on the region, Longwood has adapted and evolved from one of America’s earliest woman’s college to a pre-professional normal school for teachers, to a university while staying true to its mission-driven roots. Its distinctive character: a focus on the undergraduate experience in the classroom, opportunities for student leadership and governance, community connectedness, and supportive partnerships with regional and statewide organizations, has made it an important part of not only our region of the state but of Virginia as a whole.

Opportunities for Improvement

Longwood’s opportunities for improvement focus on ensuring stabilized enrollment amid nationwide trends and ensuring continued financial stability moving forward.

Enrollment

Longwood’s enrollment has stabilized – and shown signs of steady growth – over the last three years following a recent decline in the undergraduate population. In addition to the pandemic, there were myriad factors in the enrollment decline – demographic challenges that have affected the college-ready population of high-school seniors, financial models dependent on large-scale enrollment growth of other institutions, and out-of-state institutions targeting Virginia talent among them. Increasing graduate enrollment helped offset some of the decline in undergraduate enrollment over this period, and continues to grow. Just half of Virginia publics’ total enrollment numbers have exceeded pre-covid levels; Longwood is among this group. While we have stabilized and continue to be conservative in our

enrollment projections, we expect to see steady undergraduate enrollment over the long-term. The following are areas of focused work to address enrollment:

- **Retention.** Longwood performs well against national peers on undergraduate retention metrics, and because of focused efforts in this area has now topped an 80% retention number in successive years. We hope to continue to increase this number through initiatives described below. Sector-wide, there are significant challenges related to the pandemic on socialization, college readiness, and learning loss that will continue to be navigated.
- **Navigating pressures on high-demand programs.** Our nursing program, in particular, has historically seen high demand that we are struggling to accommodate for a variety of reasons. While enrollment has nearly tripled since 2012, qualified applicants continue to outpace available slots. We are working to navigate structural issues that limit the number of applicants we can accept, among them clinical placement opportunities in the region and recruiting and retaining high-quality faculty members in a highly competitive market. As we navigate those challenges, we continue to seek ways to address the nursing workforce shortage by developing additional pathways to earning a bachelor's in nursing degree. Additional state support for simulation lab staffing and for nursing faculty salaries would help us to address statewide challenges in this high-demand, high-growth field across the Commonwealth.
- **Teacher preparation.** Longwood educates and prepares some of the best teachers in the Commonwealth. For several years, Longwood graduates have been finalists for the VDOE Teacher of the Year award and serve in leadership roles across the state. Nationally, interest in the profession has declined, creating a shortage in classrooms and in undergraduate teaching programs. We are committed to continuing to develop creative initiatives to address this critical need and address the effect it has on Longwood's enrollment (See C4).
- **Mental health services.** Student demand for mental health services has increased dramatically over the last ten years, in both scale and complexity. More than 500 students took advantage of our Counseling & Psychological Services in the Spring 2025 semester alone. Scaling mental health services and meeting student needs is an important enrollment and retention driver. We have engaged in innovative partnerships to boost our mental health services, notably, we are one of 28 institutions serving as a pilot implementation site on a project by the Wellesley Centers for Women.
- **Post-graduate success initiative.** A major cross-campus effort to develop resources and support for students planning their careers is underway, with initiatives in Academic Affairs, Student Affairs, and Strategic Operations. (See C4).

Financial Stability

The covid pandemic had an impact on the university's finances that we are still managing, however we believe the outlook is positive. Our smallest covid classes have moved through and graduated, which has allowed us to more accurately predict undergraduate enrollment as those numbers have stabilized into similar-sized classes. Rising salaries and benefits continue to be major cost drivers, despite a concerted effort to control our workforce. We plan to address the following areas to see improvements, though naturally continued enrollment stabilization is a financial driver as well:

- **Continued headcount discipline.** Throughout the period of enrollment decline, Longwood took steps to align our workforce with the student population, keeping the employee-to-FTE ratio flat, at less than .20. As discussed below, salary and benefit increases of our employee base continue to be significant cost drivers at the university, presenting a challenge as we aim to improve affordability and access metrics that have a direct impact on enrollment.

- **Energy efficiency.** As we plan new capital projects and fund regular maintenance on the existing physical plant, maximizing energy efficiency and finding innovative approaches to energy conservation is a key priority that will affect financial stability.
- **Philanthropy.** Our mission, goals, and student support require continued fundraising to supplement state funding and tuition dollars. Longwood has seen an acceleration in philanthropy over the last five years and plans to continue building on that momentum.

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.

Preparing Students for 21st Century Careers and Meeting Virginia’s Workforce Needs

Informed by data concerning Commonwealth workforce needs, we are developing curricular pathways for students to thrive post-graduation, the overwhelming majority of them, as noted above, in Virginia. These include:

- **Continued Development of Allied Health**

We plan to continue to develop our successful nursing program on multiple fronts: addressing enrollment limitations caused by facilities limitations and faculty numbers to grow sustainably and responsibly, helping to expand clinical placements in our region (which are limited), providing non-traditional pathways to achieving a bachelor’s degree in nursing for working practitioners, addressing faculty hiring and retention in a competitive field, and exploring a Master’s in Nursing program that would help students gain more advanced training and potentially move into instructional nursing. Despite these challenges our Nursing program continues to see high demand (see B1) and we see the continued development of nursing as both a key need in the Commonwealth and a strategic enrollment priority for Longwood.

We also plan to continue to develop our communication sciences and disorders program by potentially adding a clinical educator position to increase capacity to meet student demand.

Longwood will partner with local hospitals and health systems to establish strategic, public private partnerships to increase and improve the education of students seeking a career in allied healthcare fields. The goal of such state supported partnerships will be to ensure that more students are readily equipped with the knowledge, skills, and education necessary to work in high demand healthcare careers. These partnerships will extend across the allied health continuum, and will be specially tailored to the needs of the communities we serve.

- **Strengthening the PK-12 Educator Pipeline**

Education continues to be a high-demand occupation and shortages are felt in communities across the Commonwealth, especially in Region 8, which surrounds Longwood. Our historic roots are in teacher preparation, and we have strengthened ties with Region 8 superintendents and expanded partnerships with school systems. One recent example is the Provisional Licensure Completion Initiative, where we work with school divisions and provisionally licensed teachers to help them navigate what courses they need to take to obtain their licenses. Longwood continues to expand our professional studies courses to meet this workforce demand.

Moreover, we continue to build relationships with community colleges to help provide opportunities for their students to earn baccalaureate degrees and their teaching license. One recent example is the \$1.45 million NOYCE grant that provides pathways to affordable degree attainment for rural students to pursue careers in STEM secondary education. The grant supports 20 undergraduate students—14 who are transfers from VCCS—majoring in STEM fields who will graduate with little to no student debt. (See B1).

An additional priority is collaboration with education program leaders around the Commonwealth and collaboration with the Virginia Education Collaborative to identify policy initiatives to help address the teacher shortage.

- **Business & Technology**

While careers in business and technology continue to evolve, Longwood is working to propose new degree programs that address workforce needs in data science and information technology. The Department of Mathematics and Computer Science is working to propose an interdisciplinary degree in Data Science. The College of Business and Economics is building on its current program in Cybersecurity to develop pathways and new degree programs for students in the fields of information technology and artificial intelligence.

Increased Emphasis on Post-Graduate Success

A multi-year priority, launched in 2024, centers around students choosing and completing curricular and co-curricular experiences that are linked to their success by setting post-graduate goals and creating plans to integrate experiences linked to those goals, using the principles of “life design” and “practice career everywhere.” These initiatives include:

- Training and professional development opportunities
- New student advising specifically on understanding and implementing these principles into daily life at Longwood University
- Early and frequent contacts between academic advisors, student success staff, and first-year students
- Micro-Internship opportunities
- Course-redesign grants to integrate life design and practicing career into the Civitae Core Curriculum
- Longwood Graduate Program Immersion Day
- Expanding Longwood’s annual Research and Creative Inquiry Showcase to include workshops focused on career preparation

Retention

As noted throughout, retention is a key strategic priority at Longwood. Initiatives are underway to improve retention rates among all students, with targeted strategies discussed in Section C to impact subsections of the student population.

Effective Fiscal Management with an Emphasis on Philanthropy

Longwood continues to employ a conservative financial model that allows for long-term growth and success that does not rely on unrealistic undergraduate growth. The net effect of increased philanthropic support and growth in our endowment will continue to not only limit tuition increases going forward – continuing progress on affordability and student borrowing metrics – but offset rising operating costs related to inflation. We plan to continue:

- Careful and attentive practices related to hiring while seeking out areas of greater efficiency to keep our employee-to-student ratio flat.
- Innovative approaches to long-term cost drivers like energy and utilities.
- Increased emphasis on philanthropy to drive scholarships.

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.

The Board of Visitors is regularly updated on progress of the Pell Initiative for Virginia during Board meetings through board reports by the Vice President for Strategic Operations. The VPSO meets regularly with institution leadership to report on progress on the Pell Initiative and related Longwood initiatives. Pell Initiative Grants (see C1) have funded recruiting and retention efforts in Southside and Southwest Virginia through a dedicated admissions counselor, Student Success Coordinator positions, and a Parent Engagement Coordinator focused on helping first-generation families transition to higher education.

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](#)).

OVERVIEW

Longwood’s enrollment has stabilized following a period of diminished enrollment from 2019-21, and our overall headcount has trended upward in the last four years, as the smallest of the undergraduate classes from that period have moved through to graduation, and as stabilized and slightly growing freshman classes have replaced them. We have exceeded our in-state enrollment projections over the last two years (which accounts for more than 90% of each class):

Enrollment Actual vs. Projections, 2023-25

Year	SCHEV Target Headcount In-State Undergraduate Enrollment	Actual Headcount In-State Undergraduate Enrollment	Percent of Target
2023-24	2,830	2,865	101.2%
2024-25	2,686	2,947	109.7%

Transfer students have lagged in recent years because of a variety of factors; most notably there continues to be a smaller pool of community college students to draw from, but that is offset by growth in graduate programs.

In general, we forecast an overall stable enrollment over the next six years as demographic and economic pressures affect the population of college-ready high school seniors.

Here are some of the focused trends we see:

Stabilized enrollment

Freshman enrollment for the class that matriculated in Fall 24 exceeded projections, and we expect that the incoming freshman class will match that mark. That growth, coupled with two prior years of freshman enrollment’s upward trend, gives us confidence that demand for a Longwood education remains strong and is growing in key regions of the state. Transfer students have rebounded in the incoming cohort, and we believe that we will continue to see a growth in graduate programs.

Growth elsewhere affecting Longwood enrollment

While the Commonwealth is not experiencing exceedingly large demographic changes, other states are, and have adopted a strategy of actively recruiting and heavily discounting COA for students from Virginia, thereby reducing the pool of students available to Longwood – where still 90% of our students reside.

At the same time, other state institutions have continued to grow the size of their freshman classes rather than recruit from out-of-state, which limits the pool of students drawn to Longwood.

Shifting interest away from fields that have long been enrollment drivers

- Education: Longwood’s historic roots are in teacher preparation. A lack of interest nationally in the profession has affected enrollment, and the overall trend remains negative. We continue to pursue innovative ways (See B2 for more details) to combat this trend.

- Graphic and Animation Design: Artificial intelligence has affected this degree pathway.
- Criminology and Criminal Justice: We believe a decline in enrollment reflects a shifting interest away from the profession nationally.

Strong demand for nursing, allied health and business degrees

Nursing continues to be one of Longwood's most in-demand undergraduate programs. This fall, we will enroll 97 incoming nurses, up from 37 in 2012 and an increase of 12 from the 2024 cohort. Employers routinely recruit our nurses before graduation. While demand is abundant, we have a limited number of enrollment slots we can offer because of a number of factors: chief among them are competitive pay for nursing faculty and the lack of availability of clinical opportunities in our area. Many of our students must travel significant distances for their clinical placements in Richmond, Lynchburg, or Charlottesville.

There is also continued interest in other allied health programs at Longwood, including communication sciences and disorders, kinesiology, and therapeutic recreation.

Business degrees, particularly those with a focus on accounting and cyber security, have seen increased interest over the last few years. Applications from incoming business majors saw an increase of over 200 this cycle, with deposits up by 30. We continue to recruit for the College of Business and Economics and the addition of several tracks within the master's degree in business administration give us confidence that interest in the business school will continue to increase over the long term (See C2).

Growing enrollment in graduate programs

Interest continues to be strong in our graduate programs. In Fall 2024, Longwood enrolled 1,298 graduate students, compared with 587 in Fall 2018, a 121% increase in just six years. We expect that graduate enrollment will continue to grow steadily as new opportunities are introduced in coming years (See C2).

B2. Please summarize your institutions 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.

Longwood has long used a conservative model to project enrollment, and continues to base financial projections on a conservative model that factors in demographic trends and external factors discussed above, including neighboring states' strategies to enroll high-achieving Virginia students in their flagship universities. We have confidence in our enrollment projections, while charting a slight decline over the coming years, to continue stabilization as we weather demographic and external pressures on overall enrollment.

Undergraduate Admissions

Data-driven operation with a personal approach

Longwood's success in stabilizing enrollment over the last four years has been the result, we believe, of a combination of refined data analysis with an emphasis on developing the type of human-scale relationships that reflect the experience students have at Longwood when they matriculate. We continue to use data to analyze market and demand data, allowing Admissions staff to invest more resources into students who will likely matriculate and retain, and identify regions and students who will most likely be successful at the university. We continue to build a data operation to identify younger students in the pipeline to lengthen our recruitment period.

Virginia-based geographical strategy with opportunities out-of-state

In combination with data-driven decision-making, in 2023 the university shifted its admissions-counselor strategy to embed counselors into certain geographic regions in Virginia and out-of-state to develop one-on-one relationships with students. Initial data from this strategy show it working remarkably well. In our three most competitive markets---North-Central Virginia, Richmond, and Tidewater---early freshman applications, measured as a share of total applications, are up 7%, 5%, and 6% respectively compared to 2023 (the year before the regional counselor model was launched.) Moreover, Freshman deposits from those regions have grown significantly---by 10%, 11%, and 18% respectively.

For several years, we have cultivated long-term relationships in the Maryland market, where Virginia public institutions are more competitive on cost of attendance, instead of, for instance, North Carolina. An out-of-state counselor is based in Maryland and that strategy is showing promising signs. In the 2025 cycle, we had nearly the same number of initial contacts as 2024, but they are converting to engagements at significantly higher rates in just one year (1.5% to 6.3%).

Retention

Keeping more students on track to graduation remains central to our enrollment strategy.

In the past, Longwood has been among the top 100 public 4-year institutions nationally on both retention and graduation rates. In Fall 2022, President Reveley announced the formation of a "Retention Task Force" to provide a clear picture of first- to second-year retention and make recommendations for improvement. Based on the work and recommendations of that task force, the university:

- Created two Student Success Coordinator roles within the Cook-Cole College of Arts & Sciences and the College of Education, Health, and Human Services to support academic advisors and deans, providing early warning systems and additional resources for students

needing academic or personal support through recommendations and support from the Pell Initiative;

- Revised two positions in the College of Business and Economics and in the Cormier Honors College to focus more clearly on student success in alignment with the new Student Success Coordinator roles; and
- Created interest pathways for freshmen students who have not declared a major to enroll in a variety of pre-requisite courses for a variety of majors and the Civitae Core Curriculum to keep them on-path to on-time graduation.

We are completing an Institution-Wide Barrier Review for Pell-eligible students that addresses inherent retention risks within the population and implementing recommendations. One example of changes made as a consequence of this review is the revision to the appeal process for academic suspension. The appeal process for academic suspension provided broad questions that resulted in wide variance in the quality of the student's response. This has been particularly problematic for our Pell and first-generation population that does not have the social capital, despite staff outreach to support the students through the process. Moreover the committee needed to have more training and guidelines related to the appeal review. The appeal process was revised to ask more targeted questions that elicited more detailed responses from students. The appeals committee has also received training.

Creative solutions to high-demand fields

Nursing and education continue to be high-demand fields across the Commonwealth. Longwood is in position to help fill needs in these fields, but is limited by factors discussed throughout. We are committed to meeting the needs of educators and health professionals through a variety of methods. We are pursuing creative solutions that will help grow our enrollment to fill these critical needs, including:

- Continuing measured growth in our in-person Bachelor of Science in Nursing program;
- Planning an Accelerated Bachelor of Science in Nursing degree pathway delivered in a hybrid format for working professionals;
- Launching our recently approved four-year Bachelor of Science in Special Education degree program (had been a five-year program previously);
- Partnering with school systems to run teacher apprenticeship programs for paraprofessionals at the New College Institute, sponsored by Grow Your Own grants from the Virginia Department of Education (VDOE); and
- Promoting accelerated pathways from our undergraduate programs into our graduate programs in Business, Counseling, and Communication Sciences and Disorders, as a way to reduce cost and time-to-degree.

Graduate and Professional Studies

Longwood's graduate enrollment strategy focuses on "advancing careers and changing lives" by serving the needs of working professionals, many of whom are Longwood alumni, in the fields of business, education, and allied health. We are continuously reviewing and rethinking delivery modalities (face to face, hybrid, and online) to better meet the needs of working professionals. We plan to sustain enrollment in our popular MBA program by continuing to add specialty tracks, as well as expand graduate enrollment through the development of a new master's degree in information technology. We also have a number of initiatives in graduate and professional studies to help meet the needs of educators who are seeking licensure or a new career pathway. Some of those include:

- Continuing our Provisional Licensure Completion Initiative, which has helped over 200 provisionally licensed teachers in 30 different school districts identify and enroll in the courses they need to take to achieve their licensure;
- Expanding Professional Studies offerings to include coursework required by the VDOE for licensure in Career & Technical Education, Secondary 6-12, K-12 Endorsements, Elementary, Middle 6-8, Special Education, and General Curriculum K-12; and
- Expanding teacher endorsements in Educational Leadership; Special Education, Gifted Education; Early Childhood Special Education; Reading, Literacy, and Learning; and School Librarianship.

Transfer Students

As noted throughout, we have invested resources in transfer students to remove barriers from on-time graduation, smoothing on-ramps for late-starting majors, and working with students one-on-one to ensure the maximum number of credits apply to their degree program. As we work against a sharp decline in community college enrollment across Virginia, we continue to find ways to strengthen those partnerships and the college transfer pipeline. We have expanded our relationship with Beacon of Hope, a nonprofit in Lynchburg, to increase transfer enrollment from that region (including a scholarship match to increase access and affordability) and are in conversation with Southside Virginia Community College about partnering on a teacher academy to recruit dual enrollment, high school students into the profession. There is an increased focus on encouraging campus visits, and we continue to promote the transfer guides in Transfer Virginia and work to make our curriculum more transfer-friendly.

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).

Stabilized enrollment is fundamental to Longwood’s long-term financial strength; however, unlike institutions which may rely on ambitious growth targets to balance their budgets, Longwood’s longstanding operating model is intentionally not predicated on large-scale enrollment increases. Instead, our strategy focuses on maintaining steady enrollment levels, coupled with tuition moderation.

On the revenue side, our strategic emphasis on scholarship-focused philanthropy and a growing endowment, in combination with the state financial assistance program, allows us to effectively support students and maintain affordability. This is done by strategically managing tuition discounting to ensure the net tuition revenue will be neutral to cumulatively positive due to improved enrollment, both new and returning. While inflationary pressures may increase the cost of attendance, we project the average net cost to families will remain relatively stable due to these scholarship investments and prudent financial planning. Over the past decade for higher education, there have been relevant NACUBO and GASB accounting treatment changes regarding tuition revenue, but in an apples-to-apples comparison of tuition revenue per FTE student for Longwood over the past decade, the University has seen an increase, albeit mitigated by inflation as we have worked to hold stated charge increases below inflation as well.

On the expenditure side, our strategy minimizes the need for major new investments tied to enrollment expansion (e.g., additional housing, large-scale faculty hiring). However, we continue to make targeted investments in enrollment management tools, student support services, and academic programs that align with student demand and support persistence. We are also closely monitoring the cost-per-student impacts of stabilized enrollment, ensuring that academic and student support services are delivered efficiently and sustainably.

Overall, our enrollment strategy is designed to align with our mission, preserve institutional quality, and ensure financial resilience in a volatile higher education market. We believe Longwood’s scale allows for the sense of connection and mentorship that contributes to the University’s state-leading 83% 10-year retention rate of alumni remaining in the Commonwealth.

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](#)).

First-time, full-time freshman retention

From 2020-23, first-time, full-time freshman retention rates showed steady improvement from 73% to 80%, and again topped 80% in 2024. Maintaining that retention rate above 80% is our highest-priority target, with aspirational goals to continue to see that number grow steadily over the next six years. We have several initiatives underway that directly impact first-time, full-time freshman retention, including:

- **Early alert system.** We have implemented a system that identifies students who are struggling early in their college careers and brings together student support resources for those students to aid them staying in good academic standing and staying on-time to graduation. The early results are encouraging: in spring 2025, students on probation experienced a 3.1% improvement in their average GPA compared with the previous year.
- **Language-placement improvements.** Data has demonstrated an ongoing challenge for many first-year students: completing their language placement requirements before registration. We developed a system that tracks missing language-placement scores, allowing advisors to work one-on-one with students to complete their placements, allowing for a smoother registration process and enrolling more freshmen in classes that keep them on-track to on-time graduation.
- **Academic planning.** We have piloted a planning system during Spring 2025 registration that provides students with a more intuitive tool to plan their academic path and further support student success efforts.
- **Targeted support for at-risk students.** A 2023 initiative called BOND (Beginning Our New Direction) provides mentorship and engagement for incoming students from at-risk groups, being expanded through Pell Initiative funding to target Pell-eligible and first-generation students to increase engagement and retention.

Pell-eligible student retention and graduation rates

Longwood has three Pell Initiative programs focused on recruiting, retaining and graduating more Pell-eligible students from rural regions of the state, especially in our home region of Southside and in Southwest Virginia. These programs work together to provide wrap-around support services and financial assistance to this population of students. Our aspirational goal is to align the Pell-eligible population's retention rate with that of the overall Longwood retention rate above 80%.

Our Pell-eligible efforts include:

- **Together We Support, Together We Succeed (PIV FY24).** Expands recruiting in Southside and Southwest Virginia of Pell-eligible students, and expands student support and mentoring programs.
- **Guiding Talent: Connecting Students with Enhanced Academic Support (PIV FY25).** Creates positions of Student Success Coordinators to invest resources specifically in improving Pell recipient retention.
- **LIFE STEM Scholars Program.** Funded by the NSF, the LIFE STEM Scholars program combines financial support for Pell-eligible students with additional wrap-around support.
- **BOND (Beginning Our New Direction).** A summer transition program focused on community building, resource introduction, goal setting, and success mapping.
- **Coaching Program.** Each Pell-eligible student is paired with a faculty/staff coach and peer mentor throughout New Lancer Days.

- Financial support to local students. Because data shows that students who live on campus have higher retention and graduation rates, we have provided financial support to local students, particularly Pell-eligible students from Southside, to experience on-campus living.
- Institution-wide Barrier Review. We have identified and are addressing potential barriers for students while improving institutional practices. This process is institutionalized and will be re-evaluated every five years.
- Guiding Talent. Longwood has contracted with Fig Education Lab to conduct a mixed methods evaluation of our four-year project to close retention gaps for Pell recipients and first-generation students.

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](#)).

In addition to the retention efforts listed above, we are using the following strategies to increase the percentage of Longwood students graduating in a timely manner:

Strengthening Academic Advising Across Campus

Sound academic advising is critically important to the persistence and timely graduation of our students – it is the basis of guidance through the curriculum, support during times of academic struggle, a source of meaningful faculty connection and mentorship, and preparation for post-graduate success and life planning. Through professional development, a clearly articulated university-wide vision for advising, and additional support staff to augment faculty advisors’ work, we are moving toward a comprehensive support system to strengthen academic advising.

Early Alert System

A system is in place to identify and make contact with students who are struggling earlier in the semester. This allows our Student Success Coordinators, faculty advisors, and CARE Team members to make early intervention and direct students to support systems on campus that can help them stay on track to graduate on time.

Curricular On- and Off-Ramps

We are working on efforts across campus to help students who wish to change majors navigate into and out of majors if they decide to make a change so they have a smoother pathway toward on-time graduation. By minimizing delays in “starting over,” we can keep more students on track. The Civitae Core Curriculum was built with these on- and off-ramps in mind, and our ongoing work surrounding transfer students has helped construct pathways for late-arriving majors to get quickly caught up.

Parent Engagement

A new grant-funded Parent Engagement Coordinator will collaborate with parents, particularly those students from at-risk populations like Pell-eligible and first-generation, to engage in the college process and help clear obstacles that can cause students not to persist to graduation. Universities with similar positions report students with higher family engagement are more likely to be retained.

Support for Programs that Encourage Community

When students engage with groups and activities and make meaningful relationships on campus, they build support systems that help them persist to graduation. Structural programs like coaching groups, peer mentors, BOND, and Lancers First (funded through Pell Initiatives) all have student engagement

and support as their goals, and are often the pathway for students to access a variety of support resources across campus.

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 [\(linked here\)](#).

State and Federal Data

SCHEV's debt profile reports valuable data related to student borrowing percentage and median debt of borrowers. We also monitor our graduates' loan default rate through IPEDS. We are pleased to see that our debt-to-wage ratio has fallen steadily over the last five years and both the percentage of student borrowers and per-student borrowing has also fallen.

https://research.schev.edu/studentdebt/DebtProfile_SL001.asp

We also monitor U.S. Census bureau post-graduation workforce studies found here:

<https://lehd.ces.census.gov/applications/pseo/>

SCHEV Outcomes Studies

Longwood also continues to make use of the findings of SCHEV's study "Virginia Educated: A Post-College Outcomes Study of Virginia Public College and University Graduates from 2007-2018," published in 2021.

https://research.schev.edu/downloads/virginia_educated_results/Virginia%20Educated%20Survey%202021%20Full%20Report%20no%20appendices.pdf

The survey provided useful data that has helped Longwood assess quality and impact of current initiatives, including:

- Keeping alumni satisfaction strong (Longwood one of six institutions over 90%)
- Investing in resources for faculty mentorship as a retention strategy (Longwood second in percentage of respondents who had a mentor in college)
- Continuing to build workforce pipelines (94% employment rate overall, among the highest in the state)
- Pursuing internship opportunities for students (Longwood is highest in the state of graduates who had an internship in college at 83%)
- Student-faculty mentorship (Longwood has the second-highest percentage of alumni who say they had a mentor who supported and encouraged their goals, at 65%)

Enhanced Alumni Tracking

Longwood uses Stepping Blocks software, which uses public data to track alumni employment, industry, earnings, geographical dispersal and other information at various points post-graduation.

Licensure Exams

Longwood collects licensure exam results for various pre-professional programs, notably nursing, communication studies and disorders, and education. With this data, we can make accurate predictions about students entering the workforce. Longwood students exceed target licensure thresholds, and not one area has a licensure pass rate under 95%. In three of the last five years, 100% of Longwood nursing students passed their NCLEX licensure exam (in the other two years, the cohort had a 98% pass rate).

Programs and Departments

Faculty and staff do not lose connection with students after graduation, and there is an effort across campus to track early-career placements for young alumni. Some areas, notably the Office of Teacher Preparation, College of Business and Economics, Nursing, and Communication Sciences and Disorders, do this well. Other departments can do more to track young alumni.

Longwood prepares students well for post-graduate careers and lives. As mentioned previously, 83 percent of graduates are in the Virginia workforce.

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.

Career Readiness and Career Attainment

Post-Graduate Success Initiative

Longwood has long-established, work-based learning experiences in all of its undergraduate degree programs. These learning experiences vary by undergraduate degree program and can include workplace internships, clinical placements, lab-based or field-based research experiences, or student teaching. While students find these learning experiences valuable, research shows they do not know how to articulate how their undergraduate experiences prepare them for post-graduate success. The purpose of Longwood's Post-Graduate Success Initiative is for students to set goals and develop plans for their curricular and co-curricular experiences that will help them to explore their future, and then articulate how those experiences prepared them for post-graduate success. Using the two frameworks of "life design" and "practice career everywhere," Longwood has launched activities designed to prepare our students for post-graduate success, including:

- helping students in selected academic programs to develop "Designing Your Life" plans
- introducing the "life design" framework into introductory major courses
- enhanced training for Peer Mentors and for academic advisors
- enhancing new student advising to include early and frequent contacts between the student and their advisor, particularly in the first semester.
- piloting micro-internship opportunities with Longwood alumni during winter intersession of sophomore year (Cohort 1 sites include logistics company, pediatric dentistry, regional police department, EAB)
- integrating career workshops and graduate school immersion days into our university-wide Research and Creative Inquiry Showcase days

Expanded Services in the Career Center

In 2024, Longwood launched the rebranded Center for Career Success and have hired additional professionals to support our students in their pursuit of work-based learning experiences and careers. With the help of two grants from VTOP and through partnerships with alumni groups, the Career Center has initiated a number of new programs, including speed networking, a workplace shadow program, the Career Closet, an unpaid internship stipend program, and a student work-based learning survey.

Academic alignment to workforce needs

New Degree Programs

Longwood plans to propose, over the next three years, new bachelor's and master's degree programs in data science and in information technology that will address workforce needs in the business and computer operations industries. These programs are

- Bachelor of Science in Data Science (Cook-Cole College of Arts and Sciences)
- Bachelor of Science in Information Technology (College of Business and Economics)
- Master's of Science in Information Technology (College of Business and Economics)

Other Curricular Modifications

In a continuing effort to address workforce demands, Longwood plans to enhance other academic programs in the following ways:

- The Department of Nursing in the College of Education, Health, and Human Services plans to launch in the next two years an Accelerated Bachelor of Science in Nursing degree program for health care professionals working in the field. The program will be hybrid, allowing students to take courses online while doing lab-based simulation work in person on the weekends.
- The College of Business and Economics plans to add to its MBA program with additional tracks in Technology Management, Healthcare Management, and Supply Chain Management.

Meeting Demand in Education and in Other Allied Health Fields

For undergraduates, Longwood has recently completed a multi-year effort to revise the curriculum in Elementary Education and Teaching and Elementary and Middle School Education and Teaching. We also revised our Special Education curriculum and received SCHEV approval for a four-year degree program that leads to licensure, rather than the five-year program we have historically offered.

While highly valuing our degree programs that lead to licensure in Education, Longwood also is committed to meeting workforce needs in this high-demand field, particularly in our local Region 8. Through dialogue with school superintendents and other education professionals, we have developed and plan to continue and expand multiple initiatives to support individuals seeking initial licensure or additional endorsements. Those include:

- The Provisional Licensure Completion Initiative (PLCI) for K-12 educators working in classrooms across the Commonwealth on provisional licenses to gain full licensure. Staff provide individualized advising and planning on how to complete the coursework for licensure.
- To support the PLCI, Longwood now offers the required VDOE Professional Studies coursework (except methods or content courses, which they are advised to take at community colleges) on a regular rotation across three semesters for the following areas of licensure:
 - Career & Technical Education
 - Secondary 6-12
 - K-12 Endorsements
 - Elementary
 - Middle 6-8
 - Special Education General Curriculum K-12
- The Teacher Apprenticeship Program supports two cohorts of paraprofessionals working toward their initial licensure through our Elementary Education and Teaching program offered at the New College Institute in Martinsville. This program is conducted in collaboration with local school systems and with the support of Grow Your Own grants from VDOE. With additional support, we would be able to expand the Teacher Apprenticeship Program more fully to Region 8 school systems.
- With assistance from a grant from VDOE, Longwood provides mentorship and support to first-year teachers in Prince Edward County Public Schools.
- Longwood is also committed to upskilling current educators to take on needed roles in their schools. Besides Educational Leadership, Longwood also offers endorsements in Reading, Literacy, and Learning; School Librarianship Special Education, Gifted Education; and Early Childhood Special Education.

Beyond the nursing field, Longwood's graduate programs in Counseling and in Communication Sciences and Disorders (CSD) are committed to meeting workforce needs in these high-demand fields. This year each program has created an accelerated pathway for undergraduates to enter their graduate programs. The Counseling program is particularly focused on meeting the need for counselors in public school systems. The CSD program not only produces speech-language pathologists who work in

public schools but also graduates who work in healthcare settings. The CSD program operates Longwood's Speech, Hearing, and Languages Services (SHLS) clinic that provides services to citizens in Farmville and the surrounding counties. An addition of a clinical educator position at SHLS will enable the CSD program to expand its enrollment in both its undergraduate and graduate programs.

WORKFORCE ALIGNMENT

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](#)).

Data shows that two-thirds of Longwood graduates enter high-growth areas of workforce need post-graduation. We are proud, as noted in A2, that we have the highest percentage of graduates working in Virginia – with most of them filling critical workforce needs in the Commonwealth. We have also seen an 11% growth in the number of graduates from programs aligned with high-growth occupation since 2017 (39% to 69%). Specifically, we are best positioned to supply talent in these fields:

Educational Services

Longwood has its historic roots in teacher preparation and has been a steady supplier of educators throughout the Commonwealth for many years. We continue to emphasize the training of K-12 educators, and, as noted throughout, are engaged in a number of initiatives to help address this critical workforce need. We are facing the same pressures related to K-12 teacher compensation and shifting attitudes to the profession that are depressing interest in education as a career.

Allied Health

We continue to seek ways to increasingly meet demand within our nursing program while meeting structural challenges discussed throughout. A recently created pre-medical program in our Biology department has also shown growth.

Business and Technological Services

With a planned expansion of degree programs within the College of Business and Economics and in information technology, Longwood is positioning itself to fill this high-growth occupation as the programs develop and are implemented over the next five years.

Civitae Core Curriculum

We see career preparedness and positioning graduates for workforce needs as fundamental to a Longwood education – specifically through the Civitae Core Curriculum. Civitae is required for all undergraduates, and is rooted in research regarding skills that are in high demand for the workplace – information literacy, collaboration, critical thinking, and communication skills. This training sets Longwood graduates apart when they enter the workforce, and support professional training in deep ways.

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

Beginning in fall 2025, the College of Business and Economics has repackaged its Management courses in logistics into a minor in Supply Chain Management. If enrollment in the minor is strong, and if we succeed in hiring an additional faculty member to teach in this field, then we may consider developing a new concentration in the Business Administration degree focused on Supply Chain Management. We intend to launch a new track in Supply Chain Management in the MBA program in Fall 2027. In the Logistics field, Longwood collaborates with other universities who are members of the Commonwealth Center for Advanced Logistics System (CCALS).

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 [\(linked here\)](#).

Longwood is proud to continue its track-record of tuition increases that are among the lowest in the state in the last decade, on par with inflation. In addition, net price dropped significantly in 2023-24, and annual borrowing per FTE has charted a steady decline over the last five years, thanks in large part to careful fiscal management on the part of University administrators working with the Board of Visitors, combined with investment from the state, particularly for Pell-eligible students and other forms of financial aid funding, and an increase in philanthropy used for student aid and scholarships.

Cost drivers primarily fall into one of two categories: salary-driven or inflation-driven. On the Cost of Attendance slide, the primary drivers of the combined five-year increase of \$1,900 in the tuition and mandatory fees plus mandatory non-E&G fees are salary and benefit increases, based on a combination of the unfunded portion of state-mandated salary increases and regular salary increases. The growth in room and board plus other expenses we see as inflation-driven, and has grown at pace with the national economic climate. Size is an issue as well. As a smaller institution, Longwood does not have the economies of scale that larger universities have. There are several strategies we are employing to combat both salary- and inflation-driven pressures on college affordability. We see the decline in annual borrowing per FTE and a decline in the percentage of student borrowers as evidence that these strategies are working. This philanthropic funding is important in that it supports low-income as well as middle-income students who demonstrate need but due to funding constraints, may not receive a robust state need-based financial aid package.

Philanthropic focus on scholarship dollars

Philanthropic giving has increased substantially over the last decade as Longwood's endowment has more than doubled to more than \$100 million. Scholarship dollars are the primary fundraising priority, and contributions to scholarship programs over that time have increased dramatically. The Longwood Foundation currently distributes more than 1,000 scholarships and provides more than \$3 million annually for student financial aid, nearly triple the amount in 2012 (\$1.36 million). These private dollars are an important supplement to federal and state aid, and will continue to be the University's primary fundraising priority.

Continued Investment in Pell Initiatives

Continued state support for initiatives that improve access and affordability for Pell Students is important for this growing population at Longwood. Currently there are three PIV programs underway focused on recruiting, retaining, and graduating more Pell-eligible students from Southside and Southwest Virginia. "Together We Support, Together We Succeed" (PIV FY24 Rounds 1 and 2) emphasizes recruiting efforts in those regions by addressing key financial needs, while "Guiding Talent: Connecting Students with Enhanced Academic Support" (PIV FY25) invests resources to improve the retention of Pell recipients.

Hiring discipline while investing in effective employees

Longwood has continued to be very disciplined regarding personnel expenses, especially as enrollment has stabilized at a lower overall level than pre-covid. Our ratio of employees to FTE has remained roughly flat, and we have not only implemented a thorough review at the highest administrative levels of any new employees, but also implemented an administrative review of any changes to salary or compensation throughout the year. This process requires a detailed explanation of how the hire or salary change aligns with strategic priorities and is consistent with revenue trends.

Curriculum efficiencies to improve on-time graduation

Following the recommendations of the President’s Task Force on Retention, Longwood has implemented several strategies designed to identify and aid students who are struggling academically and improve metrics related to timely graduation. As noted previously, we have hired two Student Success Coordinators who intervene with students who are struggling by the midpoint of each semester, working closely with them, professors, and other resources on campus to develop an academic recovery plan. We have additionally worked to smooth transition for transfer students to ensure that the maximum number of credits they bring into Longwood count toward graduation through specialized guidance, holistic review of transfer policies, and one-on-one advising sessions.

Addressing costs outside tuition and fees

Where possible, we are working with campus partners to assess and reduce student costs that contribute to Cost of Attendance figures. One example is the implementation of the Equitable Access textbook program, a flat rate for all textbooks and course-required books, which on average reduces the cost at the Longwood Bookstore for most students with typical course-load, which makes up more than 80 percent of our population.

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 [\(linked here\)](#).

Longwood’s process for recommending tuition and fee rates is informed by a department-by-department indexing process that is then compiled into vice-presidential sectors and analyzed for unavoidable cost increases, data from Admissions on enrollment trends, inflationary factors, and input from other departments like Financial Aid and Residence and Commuter Life. Regular assessments through the academic year gather necessary data that inform subsequent tuition and fee decisions. As mentioned previously, salary and benefit mandates, enrollment and inflation are the primary drivers of tuition increases.

Our strategic emphasis on scholarship-focused philanthropy and a growing endowment, in combination with the state financial assistance program, allows us to effectively support students and maintain affordability. This is done by strategically managing tuition discounting to ensure the net tuition revenue will be neutral to cumulatively positive due to improved enrollment, both new and returning. While inflationary pressures may increase the cost of attendance, we project the average net cost to families will remain relatively stable due to these scholarship investments and prudent financial planning. Over the past decade for higher education, there have been relevant NACUBO and GASB accounting treatment changes regarding tuition revenue, but in an apples-to-apples comparison of tuition revenue per FTE student for Longwood over the past decade, the University has seen an increase, albeit mitigated by inflation as we have worked to hold stated charge increases below inflation as well.

In years when the Commonwealth has been able to provide additional operating support, the University has been able to freeze tuition rates or approve small increases.

The unpredictability of VMSDEP waivers in particular has an impact on managing tuition revenue estimates. We appreciate the state’s support to offset a portion of those waivers.

Longwood has not changed its financial aid strategy, which utilizes state financial aid funding for need-based aid as well as private philanthropy to support merit-based aid – much of which has a need-based component to scholarship criteria. We are well-represented across income bands, and have increased our numbers over the last decade of Pell-eligible students.

Longwood has committed to transparency regarding merit-based aid—in the form of an online merit chart—that helps families and students understand their net price and provides consistent reward for students who are most academically prepared for college.

Our need-based aid also relies on the same level of transparency and consistency – aid is offered for four years at a consistent level provided the student stays in good academic standing. If that standing drops, whatever the reason, we work to identify other sources of aid while intervening in their academic career to get them back on the road to success.

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](#)).

While we consistently evaluate our pricing and discounting strategy to limit the number of unfunded scholarships while keeping enrollment stabilized, we do not envision changing our pricing and discounting strategy. Nearly all Longwood students rely on financial aid – whether need- or merit-based – and while increased philanthropic resources, state support, and measures that have improved affordability (See D1) have kept our net price on a decreasing trajectory, a low cost of attendance is an important enrollment tool.

As noted, we are proud to have a wide distribution of family income levels among the Longwood student body, and to have charted an increase in the number of Pell-eligible students who are able to find a home on campus and persist through to graduation. We recognize that our discounting rate has increased over the last ten years. For several years, we have worked with a consultant to maximize the efficiency and fairness of our financial aid awards, and to assess our pricing and discounting approach.

Our approach maintains Longwood’s bottom-line financial strength. With the support of the Commonwealth, increases in philanthropy, and careful management, the net position of the University and its component units has increased from \$232,830,154 in Fiscal Year 2018-19 (the fiscal year concluded prior to the onset of covid) to \$283,716,756 for Fiscal Year 2023-24, an increase of \$50,886,602. We expect the fiscal year just concluded to continue to underscore strong results, and that audited financials for Fiscal Year 2024-25 will reflect net position to have increased by a further 10% or more over the prior year.

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](#)).

Salaries and benefits

Salary and benefit costs continue to account for the vast majority of Longwood’s overall costs, and have increased on a per-employee basis. Though we have put into place effective hiring controls and our ratio of employees-to-FTE has remained flat, the cost to Longwood has increased, particularly on benefits. Please see D7 for more details.

Student health and mental health

Our region of the Commonwealth is designated by the Health Resources and Services Administration as a Medically Underserved Area/Population area in primary care, mental health, and dental, which has led Longwood to invest heavily in student health and mental health.

Over the last ten years, expenses related to the Longwood Health Center have increased from \$514,550 in 2015 to \$1,768,000 in 2025. From FY21-23, federal Covid funds provided some support for direct costs, but were temporary and the cost is now born in total by the university.

Repair and maintenance on our physical plant

As the third-oldest public university in Virginia, our campus is beautiful but aging, particularly on the equipment that runs our utilities. Of particular note are HVAC needs in both Chichester Hall and the Communication Studies and Theatre Arts Center, and regular repair and maintenance on housing units.

Utilities

Driven largely by inflation, our utilities costs have increased significantly over the last five years across all categories. The largest drivers are shown in the chart below We are working to minimize increases in these costs (See D5).

Increasing Utility Expenses over Five Years

Utility Expense	FY20	FY24	Percent Change
Custodial Service	\$954,303	\$1,483,814	+55%
Repair & Maintenance	\$2,614,906	\$3,946,467	+51%
Utilities	\$1,115,757	\$1,966,106	+76%

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](#)).

Headcount Discipline. Over the past several years, Longwood, recognizing that personnel expenditures primarily related to salary and benefits (see D7 for a more detailed explanation), has instituted a rigorous process that requires a multi-level approval for any new hire that includes exploring alternative options. As enrollment has shifted and stabilized, this has resulted in a flat employee-to-FTE ratio while continuing to meet campus needs. Additionally, we have instituted policies that require presidential approval for all Change in Status/Compensation forms, which has limited the number of unplanned salary adjustments.

Debt Service Retirement. The University will retire debt service over the next six years, with the resulting savings helping address cost increases related to salaries and inflation. The dollar amount of savings in the chart below is compared to base year FY25:

FY26	FY27	FY28	FY29	FY30	FY31
\$678,443	\$1,976,145	\$2,918,440	\$3,822,491	\$3,990,575	\$3,989,616

Energy and Utilities. Longwood has been working on many fronts on long-term energy needs to find greater efficiencies and limit cost increases (See D4 for details). We have entered into an ESCO contract with an outside firm for an energy assessment that will result in recommendations to reduce energy costs to the university. When implemented, the recommended changes are guaranteed to show savings that correspond to cost incurred by the university.

Information Technology. Changes to our procurement department have prompted contract negotiations and identified savings in software costs, primarily through Microsoft products. Greater efficiencies in information technology software solutions have created cost savings related to a reduced number of staff and streamlined maintenance.

Centralized Procurement. In 2024, Longwood centralized its procurement department and staffing to maximize efficiencies in purchasing across all departments in response to the state’s mandate to reduce waste. In the last year, Longwood has met purchasing goals, exceeding the Commonwealth’s SWAM purchasing goal in 2024 and on-track to again meet that mark in FY25.

Re-use of campus properties. We continue to assess the campus’s physical plant to explore re-use of buildings that would better address needs.

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.

As noted throughout, increases to salaries and benefits as well as inflationary pressures on utilities and maintenance have driven cost increases across the university, in both E&G and Auxiliary. In 2022 we identified approximately \$2 million that was reclassified from auxiliary expenses to E&G. This has driven an increase in expenses on the administrative chart in the fact pack. Our E&G and Auxiliary expenditure has risen less than inflation over the long- and short-term, while our expenditures per student rose during a period of smaller enrollment because of the covid pandemic. Please see D7 for a detailed discussion of these.

Longwood is proud to have kept its employee-to-FTE ratio flat during a period of fluctuating enrollment. While salaries continue to rise, we are employing the strategies described throughout (headcount discipline, increased philanthropy) to combat the challenge of rising capital outlay per FTE.

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 and health insurance premium increases continue to be a driver of tuition increases at Longwood. Mandated salary and benefit increases have been the largest driver of the increase to our annual operating budget over the last ten years.

Since 2015, the total number of Longwood employees has decreased by 113, keeping the employee-to-FTE ratio flat. The university share of salary expenditures, however, has increased by more than \$12 million, while university share of benefits spending has increased by \$5 million. Over this time-frame, the per-employee salary cost has increased by 44.5%, while the per-employee benefit cost has increased by 44.8%.

Year	Employees	Salary cost (university share)	Benefit cost (university share)	Salary cost per employee (university share)	Benefit cost per employee (university share)
2015-16	883	\$46,692,431	\$18,632,052	\$56,276.82	\$21,100.85
2024-25	770	\$58,826,718	\$23,533,842	\$76,398.34	\$30,563.43

The current statewide salary increases will increase the cost borne by the university by \$1.5 million. We plan to support this additional cost with a combination of much-needed general fund support coupled with a small tuition increase.

We appreciate the additional funds for access and affordability that the General Assembly has provided in recent years. If statewide salary and health insurance premium increases occur and additional state support is not available, Longwood will have to rely further on tuition and fee increases to cover those increases.

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.

We have no unanticipated funding concerns for FY26, and plan to continue to employ the strategies mentioned throughout: head-count discipline to keep our employee-to-FTE ratio flat as enrollment stabilizes, finding energy and utility efficiencies, philanthropic growth, and, as noted previously, generating revenue through a small tuition increase. If state-mandated salaries and benefits and utility and other unavoidable costs continue to rise at their current pace, Longwood would be in a similar position to most other public universities across the Commonwealth and would develop strategies to offset those costs. Continued state support to help offset mandated salary increases is fundamental to ensuring future strength.

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

Longwood Office of Community and Economic Development (OCED)

OCED initiates and encourages engagement between Longwood University, the local community and the Southern Virginia region. OCED's mission is to enhance regional prosperity as a connector, leveraging academic talents and innovation as opportunities for research, community and economic development. Its function is to raise the profile of Farmville and the surrounding region as a preferred place to live, work and/or locate a business, thus also increasing recruitment and retention of students and academic talent.

Longwood Small Business Development Center (SBDC)

The foundation of OCED and Longwood's economic development outreach is the Small Business Development Center Program, providing consulting and training to entrepreneurs in 24 localities in Southern Virginia. SBDC is a nationally accredited program funded in part by the U.S. Small Business Administration. Local governments and economic development offices provide match funding, alongside Longwood, to make the services available throughout the Southern Virginia region. Clients are regularly surveyed to assess the economic impact of SBDC services. All impact recorded must be reported by the client and attributed to SBDC in writing. In FY25, SBDC provided consulting services to 372 entrepreneurs and business owners, who reported \$10.4 million in new capital raised or invested and 134 jobs created as a result of accessing SBDC services.

SEED Innovation Hub

As a result of SBDC's work and local partnerships built over a 34 year history, the SBDC team was asked to co-lead the development of GO Virginia Region 3's Entrepreneurship and Innovation Investment Strategy in 2019. This work led to an expansion of OCED to include SEED Innovation Hub, currently in soft opening mode. FY25 is a major milestone, having secured and deployed over \$3 million in grant funds for construction, furnishing and opening of the facility. Funding partners include the U.S. Economic Development Administration (\$1.9 million), GO Virginia (\$674,000) and Virginia Tobacco Region Revitalization Commission (\$500,000). Hampden-Sydney College is also an annual operational funding partner.

The SEED Innovation Hub is a business development accelerator and training ground for both entrepreneurs and students of all ages. SEED will host university and community courses in entrepreneurship and innovation; workshops and camps for technology and STEM; youth camps in innovative problem solving; professional development for teachers; leadership development and community problem solving; and collegiate innovation courses currently co-taught by Longwood and Hampden-Sydney faculty. Local K-12 schools are actively engaged in the space. Resources in the space include the SBDC operations, maker spaces, a digital innovation lab, an advanced computing lab, and coworking spaces. A more formal opening celebration will be held after the soft opening, in Fall 2025. For more information on the vision and current activities at SEED, please see the following links: <https://www.longwood.edu/news/2025/entrepreneurship-ideas-come-to-life-for-students/>
<https://youtu.be/m7TIyC74tfs>

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.

Longwood's Freedom of Expression Policy can be found at:

<https://solomon.longwood.edu/studentaffairs/policies--procedures/freedom-of-expression-policy.php>

Longwood's Report on Protected Speech can be found at:

<https://rga.lis.virginia.gov/Published/2024/RD669/PDF>

An FAQ on Longwood's Freedom of Expression Policy can be found at:

<https://www.longwood.edu/media/student-affairs/public-site/FAQs-for-Freedom-of-Expression-Policy.pdf>

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.

Longwood is not considering any new instructional sites, schools, or mergers. We offer our Bachelor's in Elementary Education and Teaching at the New College Institute.

[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?

Longwood has long been a teaching institution. Faculty are encouraged to conduct research, and most have important research agendas underway – in particular in STEM fields, education, and business – typically involving undergraduate students. Expanding undergraduate research opportunities was the focus of a campuswide initiative and resulted in a dramatic expansion of research opportunities for undergraduates, especially with the formation of the Office of Student Research and the development of the PRISM program, an 8-week summer intensive STEM-based research program. Each semester students present mentored research across all disciplines on Longwood’s Student Showcase for Research and Creative Inquiry.

[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?

A team of Longwood faculty and partners from New River Community College, Southside Virginia Community College, and Virginia Western Community College submitted a proposal to the National Science Foundation’s Scholarships in STEM (S-STEM) program in March 2025. The team built on three previous NSF S-STEM awards to propose the Bridging Rural Access in Virginia (BRAVA) program, a six-year, \$5M initiative that would address Virginia’s demand for STEM professionals while considering unique needs of rural communities. Together, the partners addressed a key goal: cultivate an ecosystem of support services and provide significant scholarship funding to students in rural Southside and Southwest Virginia as they earn an associate degree and transition to earn a bachelor’s degree in an S-STEM-eligible discipline. The program proposed awarding scholarships of up to \$15,000 per year to address significant unmet need for scholars. BRAVA would broaden participation in STEM fields by supporting a minimum of 80 associate and 27 baccalaureate scholars (at least 200 annual scholarships in total) as they earn their degrees and prepare for successful careers in STEM. The partners have not heard any word from NSF about the status of their proposal but are highly doubtful it will be funded.

[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.

As noted throughout, we continue to advocate for changes in policies that incentivize the Commonwealth's flagship institutions to limit their out-of-state undergraduate enrollment. Competitor states – especially Tennessee, South Carolina, Georgia, and Alabama – are taking the opposite approach, targeting high-achieving out-of-state students particularly from Virginia to their flagship institutions and enjoying the long-term effects of those policies, where talent is retained and their overall economy benefits as a result. By contrast, limits on out-of-state enrollment in Virginia's flagship institutions produce the opposite effect.

Longwood would also benefit from additional flexibility and predictability regarding state-mandated salary increases for faculty and AP employees. While the Commonwealth has been generous in past years in providing base support to help offset the non-general fund share of salary increases, to alleviate pressures on institutional budgets and moderate tuition increases, another policy option worth consideration in the future would be to allocate a pool of funds to institutions to address faculty and AP employee raises without requiring a non-general fund match.

[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.

In just 14 years, Longwood will celebrate an important milestone: the 200th anniversary of its founding; only William & Mary and U.Va. are older among Virginia public institutions. Over that history, we have shown the ability to adapt to societal and economic changes and a clear mission-driven educational philosophy that produces top talent and good citizens. With our substantial strengths as our foundation: educating Virginians who live and work in the Commonwealth after graduation at the highest level – 83% – of any four-year Virginia public, developing citizen-leaders who contribute to their communities in deep and fundamental ways, and forward-thinking initiatives that respond to changing conditions across higher education, we are positioned to continue to be an essential resource to Southern Virginia and Virginia as a whole.