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

<u>For FY2025- FY2028</u>: 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.

<u>For FY2029-FY2032</u>: 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 insititution 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/accessiblity/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 Competiveness 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:	***Virginia Military Institute***
Institution UNITID:	211

Individual responsible for plan

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Part 1: Undergraduate Tuition and Mandatory Fee Increase Plans in 2026-28 Biennium
Virginia Military Institute

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	$10,368	$10,680	3.0%	$11,000	3.0%
In-State UG Mandatory E&G Fees	$0	$0	%	$0	%
In-State UG Mandatory non-E&G Fees	$10,998	$11,296	2.7%	$11,602	2.7%
In-State UG Total	$21,366	$21,976	2.9%	$22,602	2.8%
Out-of-State UG Tuition	$41,960	$43,220	3.0%	$44,516	3.0%
Out-of-State UG Mandatory E&G Fees	$0	$0	%	$0	%
Out-of-State UG Mandatory non-E&G Fees	$10,998	$11,296	2.7%	$11,602	2.7%
Out-of-State UG Total	$52,958	$54,516	2.9%	$56,118	2.9%

Part 2: Revenue: 2024-25 through 2031-32
Virginia Military Institute

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

Items	2024-2025 (Actual)	2025-2026 (Estimated)		2026-2027 (Planned)		2027-2028 (Planned)	
	Total Collected Tuition Revenue	Total Collected Tuition Revenue	Chg	Total Projected Tuition Revenue	Chg	Total Projected Tuition Revenue	Chg
E&G Programs							
Undergraduate, In-State	$9,703,229	$9,937,323	2.4%	$10,872,599	9.4%	$11,645,277	7.1%
Undergraduate, Out-of-State	$22,606,703	$22,313,336	-1.3%	$25,257,192	13.2%	$26,977,457	6.8%
Graduate, In-State	$0	$0	%	$0	%	$0	%
Graduate, Out-of-State	$0	$0	%	$0	%	$0	%
Law, In-State	$0	$0	%	$0	%	$0	%
Law, Out-of-State	$0	$0	%	$0	%	$0	%
Medicine, In-State	$0	$0	%	$0	%	$0	%
Medicine, Out-of-State	$0	$0	%	$0	%	$0	%
Dentistry, In-State	$0	$0	%	$0	%	$0	%
Dentistry, Out-of-State	$0	$0	%	$0	%	$0	%
PharmD, In-State	$0	$0	%	$0	%	$0	%
PharmD, Out-of-State	$0	$0	%	$0	%	$0	%
Veterinary Medicine, In-State	$0	$0	%	$0	%	$0	%
Veterinary Medicine, Out-of-State	$0	$0	%	$0	%	$0	%
First Professional, In-State (Total)	$0	$0	%	$0	%	$0	%
First Professional, Out-of-State (Total)	$0	$0	%	$0	%	$0	%
Other NGF	$288,327	$275,942	-4.3%	$277,741	0.7%	$279,594	0.7%
Total E&G NGF Revenue	$32,598,259	$32,526,601	-0.2%	$36,407,532	11.9%	$38,902,328	6.9%
E&G GF Revenue (assume flat after 2026)	$27,069,686	$26,551,826	-1.9%	$26,551,826	0.0%	$26,551,826	0.0%
E&G Tuition Offset Waiver	$1,083,100	$803,000	-25.9%	$803,000	0.0%	$803,000	0.0%
Total E&G Revenue	$60,751,045	$59,881,427	-1.4%	$63,762,358	6.5%	$66,257,154	3.9%

	2024-2025 (Actual)	2025-2026 (Estimated)		2026-2027 (Planned)		2027-2028 (Planned)	
Auxiliary Revenue	Total Revenue	Total Revenue	Chg	Total Revenue	Chg	Total Revenue	Chg
In-State undergraduates	$10,315,923	$11,027,314	6.9%	$11,856,524	7.5%	$12,640,220	6.6%
All Other students	$5,702,591	$5,555,113	-2.6%	$6,440,581	15.9%	$6,866,292	6.6%
Total non-E&G fee revenue	$16,018,514	$16,582,427	3.5%	$18,297,105	10.3%	$19,506,512	6.6%
Total Auxiliary Revenue	$34,013,116	$35,193,990	3.5%	$38,809,367	10.3%	$41,401,038	6.7%

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.

2028-2029 (Pro Forma)		2029-2030 (Pro Forma)		2030-2031 (Pro Forma)		2031-2032 (Pro Forma)			
Total Calculated Tuition Revenue	Chg	Total Calculated Tuition Revenue	Chg	Total Calculated Tuition Revenue	Chg	Total Calculated Tuition Revenue	Chg	2024-2032 Chg	CAGR
$11,983,850	2.9%	$12,085,110	0.8%	$12,101,535	0.1%	$12,118,409	0.1%	25%	3.2%
$27,866,812	3.3%	$28,074,288	0.7%	$28,099,926	0.1%	$28,126,213	0.1%	24%	3.2%
$0	%	$0	%	$0	%	$0	%	%	%
$0	%	$0	%	$0	%	$0	%	%	%
$0	%	$0	%	$0	%	$0	%	%	%
$0	%	$0	%	$0	%	$0	%	%	%
$0	%	$0	%	$0	%	$0	%	%	%
$0	%	$0	%	$0	%	$0	%	%	%
$0	%	$0	%	$0	%	$0	%	%	%
$0	%	$0	%	$0	%	$0	%	%	%
$0	%	$0	%	$0	%	$0	%	%	%
$0	%	$0	%	$0	%	$0	%	%	%
$0	%	$0	%	$0	%	$0	%	%	%
$0	%	$0	%	$0	%	$0	%	%	%
$0	%	$0	%	$0	%	$0	%	%	%
$0	%	$0	%	$0	%	$0	%	%	%
$0	%	$0	%	$0	%	$0	%	%	%
$281,502	0.7%	$283,468	0.7%	$285,493	0.7%	$287,578	0.7%	0%	0.0%
$40,132,164	3.2%	$40,442,866	0.8%	$40,486,954	0.1%	$40,532,200	0.1%	24%	3.2%
$26,551,826	0.0%	$26,551,826	0.0%	$26,551,826	0.0%	$26,551,826	0.0%	-2%	-0.3%
$803,000	0.0%	$803,000	0.0%	$803,000	0.0%	$803,000	0.0%	-26%	-4.2%
$66,683,990	0.6%	$66,994,692	0.5%	$67,038,780	0.1%	$67,084,026	0.1%	10%	1.4%

Part 3: Financial Aid Plan: 2025-26 through 2031-32
Virginia Military Institute

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	$9,703,229	$0	%	$1,141,237	$0	$0	$9,703,229	0.0%	-$1,141,237 Compliant
Undergraduate, Out-of-State	$22,606,703	$3,336,737	14.8%	$2,195,500	$0	$6,000	$22,612,703	14.8%	
Graduate, In-State	$0	$0	%	$0	$0	$0	$0	%	
Graduate, Out-of-State	$0	$0	%	$0	$0	$0	$0	%	
First Professional, In-State	$0	$0	%	$0	$0	$0	$0	%	
First Professional, Out-of-State	$0	$0	%	$0	$0	$0	$0	%	
Total	$32,309,932	$3,336,737	10.3%	$3,336,737	$0	$6,000	$32,315,932	10.3%	

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	$9,937,323	$0	%	$1,155,000	$0	$0	$9,937,323	0.0%	-$1,155,000 Compliant
Undergraduate, Out-of-State	$22,313,336	$3,500,000	15.7%	$2,345,000	$0	$50,000	$22,363,336	15.9%	
Graduate, In-State	$0	$0	%	$0	$0	$0	$0	%	
Graduate, Out-of-State	$3	$0	%	$0	$0	$0	$3	0.0%	
First Professional, In-State	$0	$0	%	$0	$0	$0	$0	%	
First Professional, Out-of-State	$0	$0	%	$0	$0	$0	$0	%	
Total	$32,250,662	$3,500,000	10.9%	$3,500,000	$0	$50,000	$32,300,662	11.0%	

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	$10,872,599	$0	%	$1,188,000	$0	$0	$10,872,599	0.0%	-$1,188,000 Compliant
Undergraduate, Out-of-State	$25,257,192	$3,600,000	14.3%	$2,412,000	$0	$50,000	$25,307,192	14.4%	
Graduate, In-State	$0	$0	%	$0	$0	$0	$0	%	
Graduate, Out-of-State	$0	$0	%	$0	$0	$0	$0	%	
First Professional, In-State	$0	$0	%	$0	$0	$0	$0	%	
First Professional, Out-of-State	$0	$0	%	$0	$0	$0	$0	%	
Total	$36,129,791	$3,600,000	10.0%	$3,600,000	$0	$50,000	$36,179,791	10.1%	

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	$11,645,277	$0	%	$1,287,000	$0	$0	$11,645,277	0.0%	-$1,287,000 Compliant
Undergraduate, Out-of-State	$26,977,457	$3,900,000	14.5%	$2,613,000	$0	$50,000	$27,027,457	14.6%	
Graduate, In-State	$0	$0	%	$0	$0	$0	$0	%	
Graduate, Out-of-State	$0	$0	%	$0	$0	$0	$0	%	
First Professional, In-State	$0	$0	%	$0	$0	$0	$0	%	
First Professional, Out-of-State	$0	$0	%	$0	$0	$0	$0	%	
Total	$38,622,734	$3,900,000	10.1%	$3,900,000	$0	$50,000	$38,672,734	10.2%	

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	$11,983,850	$0	%	$1,320,000	$0	$0	$11,983,850	0.0%	-$1,320,000 Compliant
Undergraduate, Out-of-State	$27,866,812	$4,000,000	14.4%	$2,680,000	$0	$50,000	$27,916,812	14.5%	
Graduate, In-State	$0	$0	%	$0	$0	$0	$0	%	
Graduate, Out-of-State	$0	$0	%	$0	$0	$0	$0	%	
First Professional, In-State	$0	$0	%	$0	$0	$0	$0	%	
First Professional, Out-of-State	$0	$0	%	$0	$0	$0	$0	%	
Total	$39,850,662	$4,000,000	10.0%	$4,000,000	$0	$50,000	$39,900,662	10.2%	

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	$12,085,110	$0	%	$1,353,000	$0	$0	$12,085,110	0.0%	-$1,353,000	Compliant
Undergraduate, Out-of-State	$28,074,288	$4,100,000	14.6%	$2,747,000	$0	$50,000	$28,124,288	14.8%		
Graduate, In-State	$0	$0	%	$0	$0	$0	$0	%		
Graduate, Out-of-State	$0	$0	%	$0	$0	$0	$0	%		
First Professional, In-State	$0	$0	%	$0	$0	$0	$0	%		
First Professional, Out-of-State	$0	$0	%	$0	$0	$0	$0	%		
Total	$40,159,398	$4,100,000	10.2%	$4,100,000	$0	$50,000	$40,209,398	10.3%		

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	$12,101,535	$0	%	$1,353,000	$0	$0	$12,101,535	0.0%	-$1,353,000	Compliant
Undergraduate, Out-of-State	$28,099,926	$4,100,000	14.6%	$2,747,000	$0	$50,000	$28,149,926	14.7%		
Graduate, In-State	$0	$0	%	$0	$0	$0	$0	%		
Graduate, Out-of-State	$0	$0	%	$0	$0	$0	$0	%		
First Professional, In-State	$0	$0	%	$0	$0	$0	$0	%		
First Professional, Out-of-State	$0	$0	%	$0	$0	$0	$0	%		
Total	$40,201,461	$4,100,000	10.2%	$4,100,000	$0	$50,000	$40,251,461	10.3%		

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	$12,118,409	$0	%	$1,353,000	$0	$0	$12,118,409	0.0%	-$1,353,000	Compliant
Undergraduate, Out-of-State	$28,126,213	$4,100,000	14.6%	$2,747,000	$0	$50,000	$28,176,213	14.7%		
Graduate, In-State	$0	$0	%	$0	$0	$0	$0	%		
Graduate, Out-of-State	$0	$0	%	$0	$0	$0	$0	%		
First Professional, In-State	$0	$0	%	$0	$0	$0	$0	%		
First Professional, Out-of-State	$0	$0	%	$0	$0	$0	$0	%		
Total	$40,244,622	$4,100,000	10.2%	$4,100,000	$0	$50,000	$40,294,622	10.3%		

** 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
Virginia Military Institute

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	$62,775,000
Total Estimated 2025-26 E&G Expenditures	$60,377,000

2026-2027 (Auto-calculated)	**2027-2028 (Auto-calculated)**
Implied GF share	**Implied GF share**
39.0%	**38.96%**

Incremental amounts relative to 2025-26 estimated baseline

		2026-2027				**2027-2028**				**2028-2029**	**2029-2030**	**2030-2031**	**2031-2032**	
Short Title	**Virginia Strategic Plan Goal(s)**	**Total Amount**	**Reallocation**	**Amount from Tuition Revenue**	**Amount from GF (Salaries & benefits only)**	**Total Amount**	**Reallocation**	**Amount from Tuition Revenue**	**Amount from GF (Salaries & benefits only)**	**Total Amount (Pro Forma)**	**Total Amount (Pro Forma)**	**Total Amount (Pro Forma)**	**Total Amount (Pro Forma)**	**Explanation** Please be brief; reference specific narrative question for more detail.
Salary & benefit increases for existing employees														
2% annual state salary increase cost		$790,373	$0	$476,445	$313,928	$1,596,553	$0	$962,418	$634,135	$2,418,854	$3,257,602	$4,113,124	$4,985,756	
1% annual state health insurance increase cost		$96,900	$0	$65,190	$31,710	$193,800	$0	$130,382	$63,418	$292,670	$392,529	$493,387	$595,252	
Additional agency salary/benefit increase cost		$649,685		$649,685		$757,410	$0	$757,410	$0	$2,315,707	$2,958,658	$3,629,796	$4,330,142	
Reduction in Planned Vacancy Savings		$700,000	$0	$700,000	$0	$750,000	$0	$750,000	$0	$500,000	$500,000	$500,000	$500,000	
[Add lines & descriptions here]		$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	
Inflationary non-personnel cost increases														
Contractual services		$304,005	$0	$304,005	$0	$701,334	$0	$701,334	$0	$489,874	$711,496	$844,061	$925,433	
Utilities		$237,701	$0	$237,701	$0	$403,481	$0	$403,481	$0	$685,393	$878,562	$1,004,874	$1,083,401	
Change in Contingencies Budget		$250,000	$0	$250,000	$0	$1,150,000	$0	$1,150,000	$0	$1,450,000	$1,250,000	$950,000	$750,000	
Increase in Indirect Cost Recoveries		-$652,032	$0	-$652,032	$0	-$929,232	$0	-$929,232	$0	-$1,190,038	-$1,509,664	-$1,649,755	-$1,794,462	
Financial aid expansion														
Addt'l In-State Student Financial Aid from Tuition Rev		$33,000	$0	$33,000	$0	$132,000	$0	$132,000	$0	$165,000	$198,000	$198,000	$198,000	
Addt'l Out-of-State Student Financial Aid from Tuition Rev		$67,000	$0	$67,000	$0	$268,000	$0	$268,000	$0	$335,000	$402,000	$402,000	$402,000	
Reduction in Budgeted Use of Reserves		$1,299,937	$0	$1,299,937	$0	$1,299,934	$0	$1,299,934	$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
Virginia Military Institute

		2026-2027				2027-2028				2028-2029	2029-2030	2030-2031	2031-2032	Explanation Please be brief; reference specific narrative question for more detail.
Short Title		Total Amount	Reallocation	Amount from Tuition Revenue	Amount from GF (Salaries & benefits	Total Amount	Reallocation	Amount from Tuition Revenue	Amount from GF (Salaries & benefits	Total Amount (Pro Forma)	Total Amount (Pro Forma)	Total Amount (Pro Forma)	Total Amount (Pro Forma)	
New/expanded academic programs														
Core Course in "American Constitutional History"		$120,000	$0	$120,000	$0	$122,400	$0	$122,400	$0	$367,248	$494,593	$624,485	$756,975	Continued delivery, assessment, and improvement of a Core Curriculum course that provides all cadets with a solid understanding of US History, the Constitution, and Civics. Additional faculty may be required.
Accreditation for the Computer Science Program		$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	Develop the Cybersecurity and Information Technology tracks within the Computer Science B.S. program into separate degree programs; obtain initial ABET accreditation of the B.S. in Computer Science program's current Theory and Application track.
Bachelor of science degree program in Kinesiology		$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	The Department of Human Performance and Wellness plans to develop a bachelor of science degree program in kinesiology, which would help prepare graduates to be exercise professionals capable of promoting, assessing, designing, and implementing exercise interventions to improve health and performance, and it would prepare them for post-baccalaureate education in medicine, therapy, exercise science, and other graduate and/or professional allied health programs.
Civil Discourse Program		$50,000	$0	$50,000	$0	$100,000	$0	$100,000	$0	$150,000	$200,000	$250,000	$300,000	The privately-funded Civil Discourse Program strives to create a culture of civil discourse on Post to foster in-person dialogue, to promote and model freedom of speech, to engage students actively, and to give students a forum to practice a number of skills that align with several VMI Academic Program goals. GF fund support may be required to ensure the long-term success of this program.
Summer Undergraduate Entrepreneurship Program		$0	$0	$0	$0	$65,000	$0	$65,000	$0	$130,000	$195,000	$260,000	$325,000	The Summer Undergraduate Entrepreneurship Program is a five-week, privately funded program that will provides coursework and experiential learning to help the participants develop an entrepreneurial mindset that will support their future plans – whether those plans involve starting a new business, employment within an existing organization, as military leaders, or self-employment. Grant funded through 2028; may require GF support to continue the program beyond the grant.
Other academic & student support strategies & initiatives														
Global Education Staff		$63,000	$0	$63,000	$0	$127,260	$0	$127,260	$0	$192,805	$259,661	$327,854	$397,411	Add a full-time support staff position in the Office of Global Education to expand the opportunities for global education provided to cadets. Assumes $45K annual salary and approx. 40% cost of benefits; 2% annual cost increase.
Strategic Enrollment Management Leadership		$0	$0	$0	$0	$0	$0	$0	$0	$193,777	$391,430	$602,036	$807,674	Adding a position to lead the newly formed Strategic Enrollment Management office and enrollment management's efforts across the Institute through a 4-year SCHEV Pell eligible student initiative. Continuation of this position beyond the 4-year grant period would be contingent upon GF support.
Center for Teaching and Learning		$550,000	$0	$550,000	$0	$706,600	$0	$706,600	$0	$1,069,932	$1,440,131	$1,817,334	$2,201,681	Establish a Center for Teaching and Learning (CTL) led by a new Associate Dean Academic Support to foster instructional innovation, pedagogical development, and academic excellence across all disciplines. The CTL would develop programs promoting and supporting best practices in curricular design and pedagogies for full-time faculty members at all stages of their careers.
Academic Support Coordinators		$0	$0	$0	$0	$0	$0	$0	$0	$165,318	$333,942	$505,939	$681,375	Adding two full-time, academic support coordinator positions in the Miller Academic Center through a 4-year SCHEV Pell eligible student initiative. Continuation of these positions beyond the 4-year grant period would be contingent upon GF support.
Career Services Internship Support		$100,000	$0	$100,000	$0	$200,000	$0	$200,000	$0	$300,000	$400,000	$500,000	$600,000	Reinstate a program to support cadets with demonstrated financial need to secure internships ensuring participation in critical career development opportunities. A $100K funding grant from SCHEV in 2024, which provided financial assistance to 38 cadets participating in internships demonstrated the effectiveness of this program to continue strong success in educational outcomes in retention and placement.
Cybersecurity Education		$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	Continued to offer an expansive program in cybersecurity education supporting the needs of the Dept. of Defense (DoD) and industries within the Commonwealth through funding support from DoD and the Commonwealth Cyber Initiative (CCI).
Leadership Development Program		$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	The VMI Center for Leadership and Ethics (CLE) will continue to deliver an extensive leadership development program for cadets and faculty and staff using a combination of local funds and E&G funds.
Military Commissioning/Service		$0	$0	$0	$0	$0	$0	$0	$0	$50,000	$100,000	$150,000	$200,000	Continue existing strategies for producing graduates who serve the nation through commissioned, military service and increasing service through employment in government agencies/non-profit organizations. The National Security Minor program, which directly supports this strategy and prepares cadets for careers in defense, intelligence, diplomacy, and public service, is privately funded through 2028; may require GF support to continue the program beyond the grant.
Technology Enhanced Instruction		$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	VMI will continue to enhance STEM instructional and research laboratories using a combination of State Equipment Trust Funding (ETF), local funds, and E&G funds. Increased ETF allocations would reduce the financial burden on E&G funds on meeting the Institute's teaching and research equipment needs.
Emphasizing STEM Majors		$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	Maintain the principles of the Core Curriculum. Curricula supporting a baseline STEM education, and continue enrollment practices and academic support programs in order to support 50% enrollment in STEM majors.

	Director of Innovation Programming		$0	$0	$0	$0	$0	$0	$0	$0	$16,000	$32,000	$48,000	$64,000	Privately funded, part-time position responsible for managing and developing academic, industry, and government partnerships, and for coordinating approaches across the Institute for partner engagement. Grant funded through 2028; may require GF support to continue the position beyond the grant.
	Commonwealth Cyber Fusion and Collegiate Cyber Cup Competition		$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	This event is designed to help build Virginia's cyber security workforce through collaboration with the participating institutions. In addition, it helps advance the economic prosperity of the Commonwealth and optimize student success for work and life. VMI anticipates hosting this event annually.
	Year-Round Facility Use		$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	The unique nature of cadet life with its demanding schedule combined with academic and extracurricular program demands ensures high use of VMI facilities. VMI intends to continue all programs that contribute to extensive year-round use of VMI facilities into the foreseeable future.
	Shared Resources		$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	VMI is involved in several resource-sharing programs with other colleges and universities in the region. We will continue to develop and maintain existing cooperative relationships, and seek new opportunities.
Other non-academic strategies & initiatives															
	[Add lines & descriptions here]		$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	
Total Additional Funding Need			**$4,659,569**	**$0**	**$4,313,931**	**$345,638**	**$7,644,540**	**$0**	**$6,946,987**	**$697,553**	**$10,097,540**	**$12,885,940**	**$15,571,135**	**$18,309,638**	

Amounts represent the portion of proposed academic strategies on lines 31-50 that are not currently funded with tuition revenue. If additional tuition revenue and/or State general fund support is not received, these initiatives will not be implemented.

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**
-$433,000	-$571,260

Part 5: Six-year Pro Forma Calculations: 2024-25 through 2031-32
Virginia Military Institute

Instructions: No new data needs to be added on this tab; it is entirely comprised by formulas. *The top section pulls in data from the previous tabs to calculate a pro forma budget surplus/deficit for the 6 years. The following section calculates what* T&F (price) and GF increases would theoretically need to occur each year in order to cover the deficit and maintain the 2024-25 GF/NGF split. *At the bottom is a blended scenario calculator that a user can leverage to calculate* custom *"shared" scenarios where deficits can be covered by a combination of expenditure reduction, T&F increases, and GF increases. Cells D28:30 should be set by the user (so long as they add up to 100%) and the results will flow into the rows below that automatically.* This analysis is intended to be directional and pro forma; it is not intended to be interpreted as a projection or plan/budget of any kind.

Note: this pro forma does not include any of the additional GF requests in the following tab; those requests would require GF funding on top of what is calculated in this tab.

																From FY25-FY32	
Baseline Pro Forma Surplus/Deficit	**2024-2025 (Actual)**	**2025-2026 (Est.)**	**Chg**	**2026-2027 (Est.)**	**Chg**	**2027-2028 (Plan)**	**Chg**	**2028-2029**	**Chg**	**2029-2030**	**Chg**	**2030-2031**	**Chg**	**2031-2032**	**Chg**	**Total Chg**	**Avg Annual Chg**
Total E&G GF Revenue from Tab2, flat after 2027-28	28,152,786	27,354,826	-3%	27,700,464	1%	28,052,379	1%	28,411,283	1%	28,776,981	1%	29,149,604	1%	29,529,285	1%	5%	1%
Tuition discount rate	10.3%	11.0%	0.6%	10.1%	-0.9%	10.2%	0.1%	10.2%	-0.1%	10.3%	0.2%	10.3%	0.0%	10.3%	0.0%	-6%	-1%
Total E&G NGF Revenue	32,598,259	32,526,601	0%	36,407,532	12%	38,902,328	7%	40,132,164	3%	40,442,866	1%	40,486,954	0%	40,532,200	0%	24%	3%
Incremental E&G NGF Revenue vs. prior yr		(71,658)	%	3,880,931	-5516%	2,494,796	-36%	1,229,836	-51%	310,702	-75%	44,088	-86%	45,246	3%	-163%	-23%
Total E&G Revenue	60,751,045	59,881,427	-1%	64,107,996	7%	66,954,707	4%	68,543,447	2%	69,219,847	1%	69,636,558	1%	70,061,485	1%	17%	2%
Implied GF % of E&G	46.3%	45.7%	-0.7%	43.2%	-2.5%	41.9%	-1.3%	41.5%	-0.4%	41.6%	0.1%	41.9%	0.3%	42.1%	0.3%	-8%	-1%
Total E&G Expenditures	62,775,000	60,377,000	-4%	65,036,569	8%	68,021,540	5%	70,474,540	4%	73,262,940	4%	75,948,135	4%	78,686,638	4%	25%	4%
Incremental E&G Expenditures vs. 2025-26				4,659,569		7,644,540	64%	10,097,540	32%	12,885,940	28%	15,571,135	21%	18,309,638	18%	293%	42%
Reallocation of existing dollars (flat after 2027-28)				-		-	%	-		-		-		-	%	%	%
Pro Forma Surplus/Deficit	(2,023,955)	(495,573)	-76%	(928,573)	87%	(1,066,833)	**15%**	(1,931,093)	**81%**	(4,043,093)	**109%**	(6,311,577)	**56%**	(8,625,153)	**37%**	**829%**	118%
Incremental Surplus/Deficit	(2,023,955)	1,528,382	-176%	**(433,000)**	-128%	**(138,260)**	**-68%**	**(864,260)**	**525%**	**(2,112,000)**	**144%**	**(2,268,485)**	**7%**	**(2,313,576)**	**2%**	**434%**	62%

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**	**2029-2030**	**Chg**	**2030-2031**	**Chg**	**2031-2032**	**Chg**	**Total Chg**	**Avg Annual Chg**
GF % of E&G	**46.3%**	**46.3%**	0%	**46.3%**	0%	**46.3%**	0%	**46.3%**	0.0%	**46.3%**	0.0%	**46.3%**	0.0%	**46.3%**	0.0%	0%	0%
Implied incremental T&F increase (%)	3.3%	-2.5%	-176%	0.6%	-125%	0.2%	-70%	1.2%	1.0%	2.8%	1.6%	3.0%	0.2%	3.1%	0.1%	-221%	-32%
Implied incremental GF Increase (%)	3.3%	-2.6%	-177.7%	0.7%	-128.0%	0.2%	-68.5%	1.4%	1.2%	3.4%	2.0%	3.6%	0.2%	3.6%	0.0%	-240.2%	-34%

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

	2024-2025 (Actual)	**2025-2026 (Est.)**	**Chg**	**2026-2027**	**Chg**	**2027-2028**	**Chg**	**2028-2029**	**Chg**	**2029-2030**	**Chg**	**2030-2031**	**Chg**	**2031-2032**	**Chg**	**Total Chg**	**Avg Annual Chg**
Implied E&G Expenditure Reduction (%)	0.0%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	%	%
Implied incremental T&F increase (%)	0.0%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	%	%
Implied incremental GF Increase (%)	0.0%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	0.0%	%	%	%
Implied GF % of E&G	46.3%	45.7%	-1.4%	43.2%	-5.4%	41.9%	-3.0%	41.5%	-1.1%	41.6%	0.3%	41.9%	0.7%	42.1%	0.7%	-7.7%	-1%

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

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.
			Biennium 2026-2028 (7/1/26-6/30/28)				
	Strategies (Match Academic-Financial Worksheet Short Title)	Category (Select best option from dropdown menu)	2026-2027		2027-2028		
			Total Amount	GF Support	Total Amount	GF Support	
1	VMSDEP (Unified Amendment)	General Operations Support	$1,500,000	$1,500,000	$3,045,000	$3,045,000	Funding to offset the VMSDEP waiver for the projected 60 or more qualifying cadets in 2026-2027 and 2027-2028.
2	Affordability Funding	General Operations Support	$580,100	$580,100	$1,160,200	$1,160,200	Add FY 2025 one-time funding to base appropriation. Funding was provided to support operations and minimize potential tuition and fee increases on in-state undergraduates.
3	Mission Ready Facilities	General Operations Support	$1,500,000	$1,500,000	$3,030,000	$3,030,000	Fund positions to provide essential operational support including three trades technicians, three custodians, and an assistant facility director.
4	Forging Fit Leaders		$250,000	$250,000	$500,000	$500,000	Enhance and bolster Unique Military Activities funding to support cadet fitness with full-time nutritionist position and fitness tracking systems to elevate and sustain physical readiness.
5	SACSCOC Quality Enhancement Plan	Curriculum	$250,000	$250,000	$500,000	$500,000	Implementation of a Quality Enhancement Plan (QEP) is a SACSCOC requirement for reaffirmation of accreditation. The actual QEP for the 2027 SACSCOC reaffirmation cycle is still being developed and has not yet been approved by SACSCOC. This cost estimate is based on past QEP implementation costs. This amount will be refined as the QEP is further developed and approved.
6	21st Century Classrooms	Education Innovation / Online Learning	$500,000	$500,000	$1,000,000	$1,000,000	Continued upgrades to classrooms with advanced technology enhance in-person instruction and make lectures and activities accessible online for cadets who are away from Post or otherwise unable to attend in person. Just as importantly, these technologies enable remote lectures from noted scholars, reducing the need for travel and associated costs.
7	Access to Excellence (Pell Grant Initiative)	Financial Aid	$2,000,000	$2,000,000	$2,000,000	$2,000,000	Continue Pell Grant Initiative funding into VMI's base operations to support recruitment
8	Center for Teaching and Learning	Student Success	$550,000	$550,000	$706,600	$706,600	Establish a Center for Teaching and Learning (CTL) led by a new Associate Dean Academic Support to foster instructional innovation, pedagogical development, and academic excellence across all disciplines. The CTL would develop programs promoting and supporting best practices in curricular design and pedagogies for full-time faculty members at all stages of their careers. Requested general fund support in FY27 includes one-time support to establish the CTL infrastructure; FY28 and beyond is recurring, personnel and operational support.
9	Career Services Internship Support	Career Readiness & Placement	$100,000	$100,000	$200,000	$200,000	Reinstate a program to support cadets with demonstrated financial need to secure internships ensuring participation in critical career development opportunities. A $100,000 funding grant from SCHEV in 2024, which provided financial assistance to 38 cadets participating in internships demonstrated the effectiveness of this program to continue strong success in educational outcomes in retention and placement.
10	Core Course in "American Constitutional History"	Curriculum	$120,000	$120,000	$122,400	$122,400	Continued delivery, assessment, and enhancement of a Core Curriculum course designed to ensure all cadets develop a strong foundation in U.S. History, the Constitution, and Civics. Additional faculty may be necessary to support sustained instructional quality and accommodate future enrollment needs.

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

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.
			Biennium 2026-2028 (7/1/26-6/30/28)				
	Strategies (Match Academic-Financial Worksheet Short Title)	Category (Select best option from dropdown menu)	2026-2027		2027-2028		
			Total Amount	GF Support	Total Amount	GF Support	
11	Global Education Staff	Curriculum	$63,000	$63,000	$127,260	$127,260	Add a full-time support staff position in the Office of Global Education to expand the opportunities for global education provided to cadets. Assumes $45K annual salary and approx. 40% cost of benefits; 2% annual cost increase.
12	Civil Discourse Program	Curriculum	$50,000	$50,000	$100,000	$100,000	The privately funded Civil Discourse Program seeks to cultivate a culture of respectful dialogue on Post by fostering in-person engagement, modeling and promoting freedom of expression, and providing cadets with meaningful opportunities to develop key communication and critical thinking skills. These efforts support several VMI Academic Program goals through debates, workshops, curriculum development, research, and assessment. General Fund support may be necessary to ensure the long-term sustainability and impact of this initiative.
13	Summer Undergraduate Entrepreneurship Program	Curriculum	$65,000	$65,000	$130,000	$130,000	The Summer Undergraduate Entrepreneurship Program is a five-week, privately funded program that will provides coursework and experiential learning to help the participants develop an entrepreneurial mindset that will support their future plans – whether those plans involve starting a new business, employment within an existing organization, as military leaders, or self-employment. Grant funded through 2028; may require General Fund support to continue the program beyond the grant.
			$0	$0	$0	$0	
			$7,528,100	$7,528,100	$12,621,460	$12,621,460	

Part 7: E&G Capital Requests in 2026-2028 Biennium
Virginia Military Institute

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)										
				2026-2027			2027-2028			
Priority Ranking	Capital Project / Building	Category (Select best option from dropdown menu)	Facility Condition Index *(for renovation projects only)* if available	Total Amount	NGF Support	GF Support	Total Amount	NGF Support	GF Support	Notes/Explanation Please be brief; reference specific justification, alternatives and additional fund sources.
1	Construct CLE Phase II	New Construction		$86,543,000	$24,058,000	$62,485,000	$0	$0	$0	Construction funding for project 211-18542 Construct Center for Leadership and Ethics Phase II and Parking
					$0	$0	$0	$0	$0	
					$0	$0	$0	$0	$0	
					$0	$0	$0	$0	$0	
					$0	$0	$0	$0	$0	
					$0	$0	$0	$0	$0	
					$0	$0	$0	$0	$0	
					$0	$0	$0	$0	$0	
					$0	$0	$0	$0	$0	
					$0	$0	$0	$0	$0	
					$0	$0	$0	$0	$0	
					$0	$0	$0	$0	$0	
					$0	$0	$0	$0	$0	
					$0	$0	$0	$0	$0	
					$24,058,000	$62,485,000	$0	$0	$0	

Part 8: Degree/Certificate Programs in 2026-2028 Biennium
Virginia Military Institute

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)**
NONE					

2025 SIX-YEAR PLAN NARRATIVE (Part II)

INSTITUTION:__Virginia Military Institute___

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 <u>as concise as possible</u> 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.

Established by the Virginia General Assembly in 1839, the Virginia Military Institute (VMI) is a four-year, state-supported college whose student body is organized as a military corps under the command of the Superintendent. The Governor of Virginia is VMI's Commander in Chief.

VMI is the oldest state-supported military college in the United States. It exists as an in-person, undergraduate-only institution focused on producing educated, honorable men and women, ready as citizen-soldiers to defend their country in time of national peril.

As a wholly undergraduate military college, VMI meets society's need for educated citizens and leaders and contributes significantly to the diversity of the Commonwealth's system of state-supported, independent institutions of higher education (15 senior institutions and 24 two-year colleges). The Institute's mission statement amplifies VMI's special statutory role.

> *VMI believes that the measure of a college lies in the quality and performance of its graduates and their contributions to society.*
>
> ***Therefore, it is the mission of Virginia Military Institute to produce educated, honorable men and women, prepared for the varied work of civil life, imbued with love of learning, confident in the functions and attitudes of leadership, possessing a high sense of public service, advocates of the American Democracy and free enterprise system, and ready as citizen-soldiers to defend their country in time of national peril.***
>
> *To accomplish this result, Virginia Military Institute shall provide to qualified young men and women an undergraduate education of the highest quality -- embracing engineering, science, and the arts -- conducted in, and facilitated by, the unique VMI system of military discipline.*

VMI's values are: Honor, excellence, self-discipline, courage, esprit de corps, selfless service, and resilience.

Annually, the VMI Board of Visitors reviews, reaffirms, or amends (as appropriate), the mission of the Institute.

There are no plans to change the Institute's mission in the next six years.

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/Distinctiveness

VMI has many great strengths and factors that contribute to its distinctiveness. It is an in-person, undergraduate-only institution focused on producing educated, honorable men and women, ready as citizen-soldiers. As a military institution, VMI makes a unique contribution to the diversity of the Commonwealth's system of state-supported and independent institutions of higher education as it contributes to meeting society's need for educated citizens and leaders.

As of Fall 2024, the Institute enrolled 1,527 cadets from 43 states, District of Columbia, and 10 countries. The population comprised 14.4% women, 7.7% Black/African American, 10.5% Hispanic, and 5.3% Asian or Pacific Islander. The ratio of cadets to faculty was 9.1 to 1.

VMI offers 14 majors (listed below) and a highly focused and personalized educational experience. Currently, VMI does not offer certificate programs or graduate degrees but may consider such in the future. The academic program consists of a demanding curriculum across all 19 degree programs within 14 majors which require 136 to 140 credit hours for graduation (above the national average of 120) or the equivalent of nine semesters of coursework completed in eight semesters.

Additionally, the Institute's leadership development focus includes comprehensive activities within Reserve Officer Training Corps (ROTC), daily formations, fitness training, ceremonies and parades, NCAA and club sports, and involvement in various leadership roles.

VMI Degree Programs	
Engineering	
Civil Engineering	B.S.
Electrical & Computer Engineering	B.S.
Mechanical Engineering	B.S.
Natural Sciences	
Applied Mathematics	B.S.
Biology	B.A.
Biology	B.S.
Chemistry	B.A.
Chemistry - Pre-Medical Track	B.S.
Chemistry - Research Track	B.S.
Computer Science - Theory and Application Track	B.S.
Computer Science - Cybersecurity Track	B.S.
Computer Science - Information Technology Track	B.S.

Physics	B.S.

Arts & Humanities

English	B.A.
History	B.A.
Modern Languages & Cultures	B.A.

Social Sciences

Economics & Business	B.A.
International Studies & Political Science	B.A.
Psychology	B.S.

The Institute's three greatest strengths are its:

1. Leader development model
2. Premier academic program
3. Strong sense of community and lifelong commitment to the Institute

Leader development model. The country's need for leaders of character is immense and VMI serves this need by developing men and women who think and act ethically, lead by example, inspire confidence, and are willing to work hard to achieve their goals. They endure rigorous training that promotes resilience and perseverance all within the construct of VMI's leader development model. This development model has produced Rhodes Scholars, numerous general and flag officers, captains of industry, a civil rights martyr, and scores of citizen-soldiers prepared to defend the nation.

Successful completion of VMI's unique educational system enables cadets to enter the armed forces, civilian professions, or to continue at graduate and professional schools. Approximately 95% of each class has full-time employment or has entered graduate school within five months of graduation, with greater than 50% of graduates accepting a military commission. Notably, VMI's officer commissioning rate is among the top 5 in the nation for all branches of service.

VMI's facilities include a robust system of leadership training initiatives (obstacle courses, leadership reaction course, high and low rope courses, and access to various exercise trails and remote lands for field training exercises) that are a significant component of the overall educational model specific to leader development.

Premier Academic Program. VMI has a renowned reputation for its commitment to highly personalized educational experiences. With average class sizes of around 16 or fewer and a cadet-to-faculty ratio of 9 to 1, VMI is a standout among competitors in providing engaging learning experiences. VMI's core curriculum, the nucleus of effective leadership, is both broad and comprehensive in scope. Key competencies include critical and creative thinking, written and oral communication, quantitative reasoning, scientific analysis, and physical education.

VMI's full-time faculty are leaders in their disciplines and in the classroom, and three have received the SCHEV Outstanding Faculty Award within the past five years. Performance domains include teaching, research, cadet development, and service. Faculty are hired and developed as "teachers/mentors to cadets first, scholars second." All VMI faculty are deeply engaged in scholarship, both their own and mentoring undergraduate research. Faculty are available to help cadets both in the classroom and out. The teaching culture is one of mentorship. Faculty routinely make themselves available to cadets in the evenings and weekends.

The VMI community. The entire VMI community, to include faculty, staff, cadets, and alumni, deliberately accepts and promotes their connection to the Institute. The strong sense of belonging is a hallmark of VMI directly connected to recruitment, retention, job placement, post-graduation networking, and a long-term connection and service to the Institute including philanthropic support. Often described as the "bonds of VMI," these lifelong connections extend to the VMI community and are a significant part of one's VMI experience from day one. The bonding occurs through adherence to the mission and values and their inculcation into the daily schedule and individual lives of the cadets.

The involvement of alumni through service and philanthropy to the Institute has direct financial impact on the ability to sustain and deliver excellence in all aspects of the VMI Mission.

Graduates of VMI are connected closely with each other but also to the Commonwealth of Virginia and the nation through service in the military and state and federal governmental agencies (e.g., intelligence services and the diplomatic corps).

VMI's rural location along the Appalachian Mountains in the heart of the Shenandoah Valley in an Appalachian Designated County provides some of the most beautiful natural resources the state has to offer.

The characteristics of this strong community attract faculty, staff, and cadets to VMI. Graduates of the Institute remain steadfastly involved and connected to each other and to the institution.

Opportunities for Improvement

VMI's enrollment numbers have shown slight increases since 2022. However national statistics project fewer high school graduates nation-wide which will increase competition among all higher education institutions to enroll new students. Since VMI does not have a graduate school, does not offer on-line classes, and does not enroll cadets in non-fall semesters, the ability to offset impacts from the enrollment shortfall presents both challenges and opportunities.

VMI's greatest opportunities for improvement include the following:

1. **Build and maintain a Corps strength of more than 1,700 cadets**. The Institute's new strategic enrollment management model continues to produce good results and meet its enrollment targets. It also positions VMI to respond to changes in college enrollment trends and pursue strategies that promote greater cadet success. While all efforts are moving the Institute in the right direction, returning the Corps strength to 1,700 will take consistent success over some years.
2. **Increase opportunities for high impact learning experiences** including internships ("Barracks to the Boardroom") and service to the Commonwealth and nation. VMI has

made strides in this area, but it remains an opportunity for improvement. The Institute hired an Employer Relations/Internship Coordinator position to assist cadets in identifying and applying for experiential learning opportunities. The Office of Career Services received a $100,000 grant from SCHEV for financial assistance to cover housing and travel for cadets participating in internships and other high impact learning experiences. Three academic programs now offer internships for credit.

3. **Funding for Mission Ready Facilities** through increasing staff to appropriate levels in order to maintain and operate newly constructed facilities. For example, the VMI Aquatic Center, opened in 2023, is a unique state of the art facility designed to meet the various needs (military, academic, athletics) of the Corps of Cadets remains understaffed and requires three custodians, three trades technicians, and an assistant facility director.

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.

The five pillars of the Institute Strategic Plan are provided below along with an abbreviated list of objectives.

1. Prepare Exceptional Leaders
   - Teach, coach, mentor, guide, and direct cadets though the VMI training model to help them develop the knowledge, skills, and dispositions necessary to become effective leaders.
   - Ensure cadets receive mentally and physically challenging experiences that lead to meaningful personal and professional development.
   - Prepare cadets for a wide variety of opportunities for service upon graduation, such as commissioning in the US armed forces, employment with governmental agencies, or private industry.
   - Increase opportunities for the VMI community to serve, debate ideas candidly and civilly, and nurture esprit de corps.
   - Explore the value-added opportunity of expanding the Institute's exceptional leadership training model and reputation in new and innovative ways.

2. Strengthen Academic Excellence
   - Explore effective pedagogical approaches to promote cadet engagement and enhance academic achievement.
   - Integrate new technology into our educational and organizational processes.
   - Recruit, retain, and promote distinguished faculty with experience in emerging fields.
   - Strengthen high-impact practices and experiential learning, such as undergraduate research, global learning, and service-learning opportunities.

3. Foster Esprit de Corps
    - Advance efforts that foster a safe, diverse, and inclusive environment.
    - Provide a supportive work environment that enhances employees' well-being through effective recruitment, onboarding, development, engagement, and compensation.
    - Deepen VMI's connection with alumni, donors, and parents.
    - Provide experiential learning opportunities that will help cadets fully integrate within the VMI system, achieve their highest potential, and be productive members of a high performing Corps of Cadets.

4. Recruit Top Cadets and Boost Success

    - Adopt and integrate a strategic enrollment management model that integrates admissions, financial, and marketing, and cadet support into one unit.
    - Be among the top five Virginia public institutions in retention and graduation rates.
    - Provide quality support services to the Corps of Cadets.

5. Delivering 21^{st} Century Infrastructure
    - Strengthen and enhance overall sustainment, restoration, and modernization of facilities to support 21^{st} century requirements.
    - Advance capital investment.
    - Modernize and enhance post-wide safety and security.

An alignment map of VMI's strategic initiatives and the strengths and opportunities outlined in A2 is presented in the table below.

Strategic Initiatives	Strength 1 Leader Development	Strength 2 Premier Academic Program	Strength 3 The VMI Community	Opp. 1 Enrollment	Opp. 2 Expand Service/Internships	Opp. 3 Mission Ready Facilities
Prepare Exceptional Leaders	X	X	X		X	X
Strengthen Academic Excellence	X	X	X	X	X	X
Recruit Top Cadets & Enrich Success	X	X	X	X	X	X
Foster Esprit de Corps		X	X	X		
Delivering 21^{st} Century Infrastructure	X	X	X	X		X

The recent national uncertainties concerning new student enrollment have prompted VMI to adopt a strategic enrollment management model that integrates admissions, financial aid, marketing, and cadet support. This model is designed to not only recruit talented cadets but also enhance their success. Actions in the Academic Excellence initiative build on and reinforce this approach by working to enhance cadets' academic motivation in the classroom and by strengthening high impact practices like internships and study abroad, activities that, according to research from the Association of American Colleges & Universities (AAC&U), increase the likelihood of retention and success.

VMI's cadet leadership development model is one of its greatest strengths. Continuous review of improvement to the model, expanding opportunities for service to the nation, and ensuring well-rounded general education experience will ensure that VMI enhances cadet success post-graduation and produces honorable, educated, ready-to-lead citizen-soldiers.

The VMI brand benefits from successes in these aforementioned areas. VMI benefits from the strong correlation between public brand perception and our ability to recruit and retain the best and brightest cadets, faculty, and staff.

Esprit de Corps – the shared sense of pride, purpose, and cohesion within the VMI community is closely tied to over morale. Key contributors to morale include a strong sense of community and market competitive compensation for faculty and staff are important factors in fostering a safe, diverse, and inclusive environment.

Additionally, exceptional facilities play a central role in sustaining esprit de corps. Well-maintained, properly equipped learning and training spaces foster pride across the Corps and campus community, while also serving as a powerful tool in attracting prospective cadets, faculty, and staff.

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 briefed at each regularly scheduled full board meeting on VMI's application and awarding of funds for the Pell Initiative for Virginia. Additionally, the Board has been briefed in various capacities regarding the grant and specific uses of funds. Most recently, a summary of activity and future planned initiatives was briefed at the Board of Visitors May 2025 meeting and an Institute-wide Pell Review is scheduled for the September 2025 meeting.

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).

VMI is a mission-driven institution that operates with a steady enrollment model, enrolling approximately 500 new cadets each fall. VMI's educational model emphasizes maintaining an intentionally sized Corps of Cadets to support the rigor and cohesion of our four-year, immersive leader development program. Given the Institute's structure and culture, transfer enrollment remains limited, consistent with the design of our cadet experience.

In recent years, VMI experienced two consecutive cycles of enrollment below target, which prompted a strategic reassessment. In response, the Institute made investments and organizational improvements in Strategic Enrollment Management—enhancing outreach, streamlining admissions processes, and strengthening the support structure for prospective cadets. These efforts have successfully reversed the decline in completed applications, and VMI met its enrollment goals for the last two years.

We have also observed a modest increase in in-state enrollment, supporting broader goals of accessibility and alignment with the Commonwealth's education priorities.

While retention and graduation rates remain strong, we continue to monitor and address a decline from a peak retention rate of 92% in Fall 2014, which represented a historical high. Current retention trends, when viewed over time, align closely with institutional norms and remain just above VMI's long-term average when the 2014 outlier is excluded. Retention remains a strategic priority, with continued efforts to enhance cadet support, advising, and academic success initiatives.

Enrollment Outlook

For the Classes of 2027 and 2028, VMI successfully exceeded its enrollment targets of 450 and 495, respectively. Based on trends and historical admissions data, the Institute remains optimistic about enrollment of approximately 500 for the Class of 2029 ahead of projections.

<u>Key Metrics</u>

Class of 2029 Deposits thus far:
As of June 30, 2025: 503 deposits received
As of May 16, 2025: 480 deposits received
49 deposits have been cancelled to date

With current deposit figures tracking slightly ahead of historical norms, VMI remains optimistic about being close to its enrollment goal for the Class of 2029, barring any unexpected developments.

The financial implications of missing enrollment targets are that VMI will miss budgeted revenues, thus requiring an adjustment of planned expenditures. Historically, VMI has shown an ability to implement cost-saving measures in the areas of personnel, non-capital projects, and other areas of discretionary expenditures (travel, etc.). VMI operates with a strong commitment to efficiency and fiscal responsibility.

A summary of key opportunities, challenges and data are discussed in the realm of enrollment.

<u>Enrollment Sustaining Opportunities</u>

Call to Duty Scholarship Program: The implementation of this program – which covers housing and food for recipients of three- and four-year national ROTC scholarships – has significantly increased interest and applications from prospective cadets. It also helps level the playing field with other Senior Military Colleges that offer similar incentives.

Integrated Recruitment Operations: The establishment of Strategic Enrollment Management has enhanced both internal and cross-departmental workflows, resulting in a more strategic, coordinated, and effective recruitment approach.

Modernized Infrastructure: Updates to the admissions and financial aid systems has improved the Institute’s communication strategy. These enhancements also provide better insight into points of attrition within the admissions funnel.

Common Application Adoption: VMI’s implementation of the Common App has expanded its national visibility and access to a broader pool of applicants.

Strategic Recruitment Focus: A targeted recruitment shift toward prospective cadets who seek a world-class education in a disciplined military environment has yielded higher conversion rates throughout the admissions cycle.

Data-Driven Decision Making: The use of historical admissions data, national trends, and industry best practices has helped to refine the Institute’s recruitment strategies.

Challenges Facing Enrollment at VMI

Military Enlistment Competition: The Department of Defense, via aggressive marketing and incentives, is working to boost enlistment. This has and will create increased competition and negatively impact our rat year enrollment.

Temporary ROTC Scholarship Reductions: The recent, temporary reduction in campus-based three-year ROTC scholarships has adversely affected rat enrollment. For example, 23 cadets in our Class of 2028 had campus-based ROTC scholarships. VMI lost this opportunity during our peak recruitment cycle for the Class of 2029 as we did not have any campus-based ROTC scholarships to offer. However, with a lack of acceptances at the national level for 4-year ROTC scholarships, VMI was able to secure some campus-based ROTC scholarships for the Class of 2029. Long-term concerns remain about the allocation and future ROTC reductions.

Federal Service Academy Competition: Decreases in applications to federal service academies and their preparatory schools have intensified competition. VMI continues to lose a notable number of deposited students to last-minute academy appointments, sometimes late into the summer.

Shifting Demographics: National trends show a decline in male college enrollment, directly impacting VMI's applicant pool given its predominantly male cadet population. In addition, the impending Enrollment Cliff means there are fewer high school aged students entering college and as VMI does not have a lot of transfer cadets, this will adversely impact enrollment as well.

Post-Pandemic Landscape: College application rates remain below pre-pandemic levels. In addition, high school graduates are presented with more postsecondary alternatives than in previous years, further complicating enrollment efforts.

Reputational Headwinds: Negative publicity from the state-initiated Equity Audit continues to impact VMI's public perception and brand positioning.

Affordability Concerns: Despite the strong return on investment from a VMI degree, families, particularly those outside of Virginia, cite cost and student debt aversion as barriers to enrollment.

Academic Flexibility Limitations: VMI's requirement for applicants to declare a major at the time of application may deter undecided applicants. In addition, current caps on majors do not align with cadet interest and may limit enrollment growth.

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.

VMI has developed a focused, data-informed enrollment management strategy that reflects the Institute's steady enrollment model, distinctive mission, and the challenges of a shifting demographic landscape.

New Enrollment Marketing Partnership: VMI has established a strategic partnership with Spark451, a national enrollment marketing firm, to amplify the Institute's brand and leadership development model across Virginia and on a national scale. This partnership enhances outreach to prospective cadets who are mission-aligned and academically prepared.

Refined Recruitment Strategy: As the nation enters the enrollment cliff, VMI recognizes the critical importance of identifying and engaging prospective cadets who are uniquely aligned with the Institute's mission. Priority populations include:

- JROTC
- Eagle Scouts
- Boys and Girls State attendees
- Civil Air Patrol
- National Honor Society
- National Beta Club
- Students from military high schools

The Institute also engages in strategic partnerships like the U.S. Army JLAB competition and tracking the Infinite Scholars Program college fair schedule to expand outreach.

Changing Demographic Landscape: As national trends show a continued decline in college enrollment, particularly among white males, VMI remains committed to recruiting a diverse student body. Key initiatives include increasing participation in national college fairs focused on access and affordability for high-achieving students from underrepresented backgrounds, establishing relationships with all-female schools, and attending Girls State events in critical regions/locations, etc.

Data-Informed Recruitment Planning: Historical admissions data guides all facets of recruitment strategies including travel schedules, engagement opportunities, communication sequencing, allowing for a more efficient and effective allocation of resources.

Open House Conversion Strategy: Open House programs are a proven driver of enrollment with 65-75% of attendees historically matriculating. VMI has intensified marketing efforts targeting parents and high school juniors and seniors to promote Open House attendance.

In-Person Education Model: VMI remains fully committed to a 100% in-person academic and co-curricular model, reinforcing its immersive, four-year leader development experience and setting the Institute apart in a shifting educational landscape.

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).

VMI remains mindful of trend data projecting enrollment difficulties for colleges in the future, which shows males, a large demographic at VMI, are enrolling in college less frequently than in previous years. The Institute remains optimistic it can attain its goals based on recently implemented initiatives. For example, with the addition of the Common Application, VMI has experienced an increase in applications, reversing a recent trend that saw applications remaining flat or declining. The Institute continues to market the value of the VMI experience in terms of return on investment, comparative salary levels post-graduation, and VMI's commitment to having cadets commission into one of the branches of the armed services. Therefore, the Institute's recruitment and retention strategies will continue focusing on methods to amplify the value of a VMI education to prospective and current cadets and their families.

VMI's goal is to incrementally improve enrollment numbers to reach a full-strength of 1641 cadets by 2029-2030. This is achievable because:

- VMI made recent enhancements to its Admissions and Financial Aid operations, including the hiring of new directors in each unit in 2022. One premise of enrollment management is to leverage financial aid in terms of recruitment and retention while also working on more targeted approaches to recruitment in general. Additionally, enrollment marketing is now part of the admissions and financial aid strategy to help streamline communications and track enrollment and recruitment initiatives.

- Preliminary Fall 2025 Admissions data indicate that anticipated matriculation numbers are on target to meet or exceed the enrollment goal of 500 new cadets. This success is due in part to the new strategies in place by Admissions and Financial Aid. Through their combined approach to recruitment, VMI expects to matriculate future incoming classes of over 500, pending unforeseen circumstances.

- VMI has undertaken efforts to implement the framework of strategic enrollment management through multiple changes in its organizational structure. First, as mentioned, the targeted and combined efforts by Admissions and Financial Aid have been re-imagined and enhanced. VMI has also added the Common Application as an option for prospective cadets to use to apply for admission and changed the internal admissions application form through the implementation of a customer relationship management program (CRM). These actions further reduce barriers to applying for admission by easing the process for high school graduates and transfer students, while simultaneously improving communication. As most of these processes have been historically completed manually, the CRM allows for automatic communication, better data utilization, and improved admissions funnel management to help move prospective cadets through the process at VMI.

VMI will also continue to evaluate efforts in cadet support to enhance academic achievement (retention/graduation) without sacrificing academic rigor. This approach correlates back to the strategic enrollment management model, where a more holistic approach will help retain and graduate cadets, thus reducing attrition and ensuring revenue from tuition and fees is steady and predictable. VMI aims to identify and help at-risk cadets earlier and provide a clearer path towards successful course completion and graduation through improving access to academic resources, early alert management for at-risk cadets, and better communication across Post.

VMI has benefited greatly through the receipt of Pell Grant Initiative Funds awarded by SCHEV and has used these funds to create the strategic enrollment management framework currently in place and yielding positive results. Since the valuable and timely 4-year grant funds were only provided through 2026-2027, VMI anticipates submitting a general fund request for 2027-2028 of $2.0M, to sustain the transformational enhancements made possible through the grant.

SECTION C: STRATEGIC DEEP DIVE – PROGRAM ALIGNMENT & PERFORMANCE

COMPLETION OUTCOMES

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

C1. What are your highest-priority completion outcomes targets, both overall and for particular student segments? Please include aspirational targets, realistic expectations, and qualitative targets and specify by when and how you are aiming to meet those targets (e.g., X% 6-year graduation rate for Pell students by 2030). Also include information on recent changes in completion outcomes. When responding please reference the "Completion" section of your institution's fact pack data (linked here).

Highest Priority Completion Outcome

VMI's highest priority completion goal is to consistently achieve top five retention and graduation rates among Virginia's four-year public institutions. VMI's educational model is intentionally structured for cadets to graduate in four years. The Institute permits cadets to extend their residency to five years and/or to complete their degree requirements in absentia up to 10 years. Nearly all cadets graduate within six years of enrolling.

Aspirational Outcome Targets

Six Year Graduation Rate

VMI six-year graduation rate is 76%, placing the Institute six points above the average for Virginia's public four-year institutions and 15-points above the national average (NSC, 2018 cohort). By 2030, VMI aims to increase graduation rates to 80%.

First-year Retention Rate

The most recent retention rate was 81% (2023 cohort, FTF), ranking 9th place among Virginia public colleges. VMI goal is to achieve a rolling six-year average of 85% by 2028.

Underrepresented Cadets: Enrollment, Retention, and Graduation Rates

In Fall 2024, underrepresented cadets made up approximately 43% of the Corps of Cadets which is 13-points increase over the past decade. For the 2023 cohort, the first-year retention rate was 75%. The most recent six-year graduation rate, based on the 2018 cohort, was 70%. VMI aims to maintain 70% graduation rate on a rolling six-year average.

Pell Eligible Cadets Graduation Rate

Pell grant recipients (18% of cadets) have a current six-year graduation rate of 64%. This data fluctuates dramatically due to small cohort sizes. VMI aims to maintain a 70% graduation rate on a rolling six-year average.

Gender

Graduation rates for both male and female cadets have remained at or above 73% over the past five years. Males tend to graduate at higher rates than females (77% (M) vs. 74% (F) vs., 2018 Cohort). Retention rates for both groups have been historically similar, with differences of only a few percentage points. The most recent retention rate is approximately 81% for both females and males (2023 cohort). VMI seeks to continue closing this small gap.

Strategic Efforts to Maintain Effort and Meet the Goals

VMI currently provides a wide variety of academic support services, including faculty serving as academic advisors, tutoring services in written and oral communication (from The Writing Center), in math (Math Education Resource Center), and learning support services from the professional staff of the Miller Academic Center. In addition, NCAA athletes have access to weekly academic mentoring. These services are offered at no cost to cadets, but use is generally on a voluntary basis.

VMI realizes that to be able to make a sincere attempt at improving retention and graduation rates, additional resources will need to be available for a variety of academic support services. Recent funding from the state provided key resources to hire additional academic support personnel and resources awarded via the Pell Grant Initiative for the recruitment and retention of Pell-eligible cadets provide valuable resources to specifically support at-risk cadets. Changes in academic support recently undertaken in the Summer Transition Program (STP- an optional four-week summer session for incoming cadets, where they take one academic class, designed to improve the academic and physical fitness readiness) are designed to identify incoming cadets at-risk in reading, math, and comprehension skills. During the period from matriculation day to the start of the fall semester, additional time has been allocated for academic orientation, to include topics such as study skills, keeping a calendar, and note taking. These new initiatives during orientation are for all incoming cadets. The additional academic support personnel also make it feasible to provide more academic support in the Miller Academic Center, the Writing Center, and the Math Education Resource Center. Once the academic year commences, cadets identified as at-risk will continue to receive appropriate support services during the academic year. Cadets not at-risk will have access to the full range of academic support services but unlike an at-risk cadet, will engage with academic support on a voluntary or as-needed basis.

In summary, VMI's objective is to improve retention and graduation rates to be among the best in the Commonwealth – top 5 among Virginia public institutions. By monitoring academically vulnerable cadets more closely and intervening with academic support sooner, VMI can achieve this goal.

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).

VMI is committed to ensuring that all cadets are positioned to graduate on time through a well-structured, well-resourced network of academic support services designed to meet the unique demand of its rigorous academic programs.

Miller Academic Center (MAC): Focuses on the academic success of the entire Corps across all majors. Initiatives include:

- Academic workshops focused on study skills, time management, and exam preparation.
- Peer-led group study sessions.
- Disability services.
- Individualized academic coaching and guidance for cadets choosing/switching academic majors best fitting their academic strengths and interests.
- A peer tutoring program that provides support for all subject areas, and for which the aim is to secure CRLA (College Reading and Learning Association) certification.

- Programming for cadets on academic probation is also in place to help these cadets boost their academic skills and performance, improve time management, and have a better understanding of VMI's academic standards so that they can get back into good academic standing.

Mathematics Education and Resource Center (MERC): The MERC provides essential mathematics support through:

- An Open Math Lab staffed with professional and peer tutors.
- Course-specific support and one-on-one tutoring. These resources are particularly valuable for STEM majors and for reinforcing core quantitative skill critical to success in VMI's academic programs.

Writing Center: The Writing Center strengthens communications through:

- One-on-one writing process conferences.
- Peer and professional tutoring.
- Support for all stages of the writing process – from brainstorming to final editing. This central location plays a critical role in preparing cadets for academic, military, and professional writing expectations.

Expanded Academic Support Positions:

- In FY2023, the state provided VMI funding to add three full-time, academic support positions enhancing VMI's capacity to personalize services. These positions have enabled VMI to provide additional academic support to cadets thereby improving academic success in support of the outcomes listed in C1.

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).

VMI’s Office of Career Services (OCS) collects data from multiple sources, including First Destination Surveys, alumni records, and an online database (Handshake). The collected data includes first destination after VMI, employment rates, wage, and location within six months of graduation. Following are VMI highlights from the First Destination Report for 2023-2024 graduates (99.5% response rate):

- 53.4% commissioned in military service,
- 94.6% commissioned, employed or enrolled in graduate school,
- 3.9% seeking employment.

The extracted data from April 2025 from the U.S. Department of Education College Scorecard and the median debt of graduates as reported by SCHEV shows that VMI’s graduates have median earnings of $77,369 compared to the midpoint for 4-year schools, $53,727. SCHEV data (EOM 06) show that the median debt of VMI graduates in 2022-2023 was $26,720, slightly more than the statewide median for 4-year public institutions ($25,732).

Overall, the data shows VMI graduates have a very high probability of full-time employment with above average salaries and with median debt slightly above the median debt of graduates from Virginia 4-yr public institutions.

As a Senior Military College (SMC), developing citizen-soldiers with a commitment to service to the nation is one of VMI’s greatest strengths. Annually, over 50% of graduates commission in the military, a large percentage of them serve the nation through law enforcement occupations or at other federal or state agencies and are highly diverse in career attainment.

Data collected at the end of the AY 2024–2025 academic year will be used to evaluate the internship program at VMI and gain insight into the types of experiences in which cadets are engaging. This data will be gathered annually to identify trends in perceptions and the overall impact of internships during cadets' academic careers. The findings will be used to support VMI’s efforts to strengthen partnerships with employers, ultimately expanding internship opportunities for cadets. Additionally, VMI plans to critically assess its on-Post, paid cadet worker programs by reviewing learning objectives and performance evaluations with the goal of enhancing experiential learning and professional development on Post.

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.

According to the Association of American Colleges and University's survey of employers (hiring managers and executives), some of the most desired skills in college graduates are:

- The ability to work effectively in teams
- Critical thinking skills
- Data analysis and interpretation
- Ethical judgement and reasoning
- Ability to apply knowledge in real world settings

VMI's unique blend of military, academics, and athletics provides cadets with substantial opportunities to develop these skills in a variety of settings, making them coveted assets to employers in a wide variety of organizations and industries. The ability to work effectively in teams is required for success at VMI- cadets must work together in the barracks, in the classroom, and on the ROTC training grounds in order to accomplish their goals. Their time schedule is intentionally tight. They must negotiate their heavy commitments without compromising their honor and integrity. Confronted with the constant enticement to take an easier path, they must make the ethical choice or face severe consequences – just as one faces in the "real world." Lastly, in the classroom, rote memorization will not suffice to achieve success. Cadets must apply what they have learned, be it in math, science, English, or history, and demonstrate their ability think critically and creatively as part of VMI's Core Curriculum requirements. In sum, the VMI experience is thoughtfully and intentionally designed to serve the needs of many organizations – be it the U.S. Armed Forces or in the public or private sector.

VMI will continue its strategy of producing graduates who serve the nation through commissioned, military service in addition increased service by working for government agencies or non-profit organizations. To achieve this, the Institute will maintain (or increase) the number of recruitment events for the United States Armed Forces, government agencies, and non-profit organizations. The Institute also intends to award additional (merit) financial aid through the Call to Duty Scholarship program in order to attract additional ROTC Scholarship recipients.

While almost all cadets who receive a commission will participate in at least one period of summer, experiential learning with the military branch in which they will serve, VMI plans to increase the number of cadets who participate in experiential learning, internship, for and not for credit. Currently, three academic departments (i.e., Economics and Business, Biology, Computer and Information Sciences) are offering internships for credit.

VMI will continue to expand its cybersecurity education offerings, supporting the needs of the Department of Defense (DoD) and other government agencies, as well as industries within the Commonwealth, through funding support from DoD and the Commonwealth Cyber Initiative.

VMI's Leadership Development Program, which combines classroom training through the Core Curriculum leadership course LEAD 344 (Leadership in Organizations) with practical leadership experience within the Corps of Cadets, is uniquely positioned among Virginia's state supported colleges and universities to prepare cadets for future leadership and management roles in the military, government service, non-profit organizations, and private industry.

VMI offers a privately funded, Summer Undergraduate Entrepreneurship Program. This five-week program will provide coursework and experiential learning to help the participants develop an entrepreneurial mindset that will support their future plans – whether those plans involve starting a new business, employment within an existing organization, as military leaders or self-employment. Skills associated with an entrepreneurial-mindedness typically include adaptability, perseverance, creativity, managing ambiguity, and being action-oriented – all skills that could lead to personal success in any setting. Private funding support for this program is committed through the summer of 2028.

VMI will maintain the principles of the Core Curriculum supporting a baseline STEM education and continue enrollment practices and academic support programs in order to support 50% enrollment in STEM majors. In doing so, the Institute will produce graduates prepared to enter an employment market that increasingly relies on technology and requires a strong baseline of knowledge in STEM.

To execute these strategies, VMI will continue to increase partnerships with alumni and private and public sector employers to increase internship opportunities. Following COVID-19, there has been an increase in remote internships, which appear to work well with cadets during the fall and spring semesters. In recent years, VMI has encouraged employers to list paid opportunities to ensure that all cadets, including those from low-income backgrounds, can participate. Efforts to increase the accessibility of internships have continued, including expanding internship postings on Handshake. In 2024, a SCHEV grant and support from the Office of Career Services provided $100,000 in financial assistance to cadets participating in internships and summer jobs helping cover housing and travel expenses. To further expand internship opportunities, VMI hired a full-time Employer Relations/Internship Coordinator position within the Office of Career Services.

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).

VMI produces leaders with a strong commitment to service. As a Senior Military College, approximately 50% of graduates enter military service and many graduates who do not enter the military serve the nation/Commonwealth in other federal or state agencies. VMI currently offers 14 versatile majors, which provide graduates with a strong, liberal arts education that prepares them for a wide variety of occupations or for continued, specialized education at the graduate level. In addition, the following areas of the academic program contribute more specialized talent to the workforce:

- The Computer Science program within the Computer and Information Sciences Department, supported through the Department of Defense and the Commonwealth Cyber Initiative, and the Electrical and Computer Engineering program support "Computer Occupations."
- The Association to Advance Collegiate Schools of Business accredited Economics and Business program supports "Business Operations Specialists" and "Financial Specialists."
- The three ABET *(Accreditation Board for Engineering and Technology, Inc.)* accredited engineering programs produce graduates who support a variety of engineering and construction related industries as well as "Skilled Trades."
- The Psychology program supports "Counselors, Social Workers, and Other Community and Social Service Specialists."
- Programs in the life sciences and natural sciences, a minor in exercise science, as well as graduate school partnerships with several medical schools, support a wide variety of occupations on the area of "Healthcare Diagnosing or Treating Practitioners." A planned degree program in kinesiology would further support the Institute's alignment with this occupational group.

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

The Department of Human Performance and Wellness plans to develop a Bachelor of Science degree program in kinesiology. The proposed program would prepare graduates to be exercise professionals capable of promoting, assessing, designing, and implementing exercise interventions to improve health and performance. In addition, graduates of this program would be prepared to pursue post-baccalaureate education in medicine, therapy, exercise science, and other graduate and/or professional allied health programs. This program would strengthen VMI's alignment with the "Healthcare Diagnosing or Treating Practitioners" occupational area.

In the 2023-2024 AY, the Department of Computer and Information Sciences separated the computer science major into three distinct tracks, which enabled majors to concentrate studies and better align skills with different aspects of the various "Computer Occupations." The tracks are (1) Theory and Application, (2) Cybersecurity, and (3) Information Technology. CIS plans to develop the Cybersecurity and Information Technology tracks into separate Bachelor of Science degree programs, which will further improve graduate skill alignment within the "Computer Occupations" career grouping.

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).

VMI is committed to maintaining affordability and access for all cadets, with a particular focus on minimizing student debt, supporting timely graduation, and sustaining financial aid for Virginia residents and need-based populations.

Full-time, Four-Year Completion Focus:

All VMI cadets are enrolled as full-time students each semester, and the Institute's academic advising, cadet support programs, and retention strategies are intentionally designed to ensure four-year graduation. These wrap-around support services ensure cadets are guided to graduate in four years, minimize potential debt, and are positioned to graduate with their class, which is a historically motivating factor of success at VMI.

Tuition Restraint and Institutional Commitment:

Through the efforts of the VMI administration and Board of Visitors, a significant focus has been placed on overall affordability and *flattening the curve* of increasing tuition and fees in the wake of inflationary impacts on costs. Notably, for 2025-2026, VMI's tuition will not increase, marking the third time in seven years that tuition has not increased.

Financial Aid Strategy and Resource Allocation:

VMI annually evaluates its expenditures (personnel and non-personnel) to ensure it is a good steward of public, private, and tuition dollars. VMI also continues to use available financial aid funds to meet 100% of the demonstrated need of Virginia cadets who apply for aid by the annual priority deadline. During the 2024-2025 academic year, VMI used $3.34M of tuition for financial aid, which was a decrease from the allocation used in 2023-2024.

Private Support and Need-Based Aid:

The VMI Alumni Agencies continue to prioritize need-based financial aid in their fundraising efforts, helping to reduce the financial burden on cadets and families and ensuring financial circumstances are minimized as a barrier to persistence and graduation.

Expected Impact:

As further discussed in D2, many factors impact decisions on tuition and fee increases, with affordability being an overriding consideration. VMI's robust financial aid resources help ensure the Institute remains accessible and affordable to qualified individuals, sustains high four-year graduation rates, minimizes student debt, and support enrollment of qualified cadets.

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).

VMI's tuition and fees are more comprehensive than most colleges and cover the majority of expenses a cadet must incur while enrolled. In addition to covering costs of the educational program, fees cover housing for all cadets as VMI is 100% residential, a full meal plan of 21 meals per week for every cadet, provision and maintenance (including laundry/dry cleaning) of uniforms, and costs of participating in various military and athletics (including club sports) co-curricular activities.

VMI limits tuition and fee increases as much as possible. Key factors considered in setting tuition and fee amounts include unavoidable cost increases such as employee salary/benefit increases, inflation driven cost increases in normal operating expenses such as utilities, supplies, contractual services etc. In addition, the Institute considers various cost measurement metrics such as changes in Consumer Price Index (CPI) and Higher Education Price Index (HEPI) to ensure tuition and fee increases are in line with current economic conditions.

VMI's financial aid policy is to meet 100% of the demonstrated need of all in-state cadets. This policy, in addition to being need-blind throughout the admissions process, requires the Institute to have a robust financial aid program that utilizes extensive private financial aid funding, Federal grants/loans, State financial aid funding, and significant Federal ROTC scholarship funding. These sources provide both need-based and merit aid to cadets to help ensure that qualified individuals have the opportunity to attend VMI regardless of their economic status.

Out-of-state cadet tuition in FY2025 represented about 117% of the total cost of education, exceeding the State minimum requirement of 100%. In-state tuition represented only about 29% of the total cost of education. Tuition revenue from out-of-state cadets has helped to mitigate the shortfall in State general funds in meeting its goal of funding 67% of the cost of education for in-state cadets. Out-of-state tuition revenue is significantly helping to minimize in-state tuition increases that would otherwise be necessary to make up this shortfall in State general funds. In FY2025, out-of-state cadet tuition is four times greater (4.05) than in-state tuition ($41,960 versus $10,368) and out-of-state tuition revenue comprised 70% of the total E&G tuition revenue in FY2025 although out-of-state cadets comprised only 36% of the total Corps.

In response to strategies undertaken by several Senior Military Colleges, including The Citadel and Norwich University, and to remain competitive with the Service Academies, VMI is utilizing private support to provide additional (merit) financial aid through the Call to Duty Scholarship Program, providing an award to cover VMI's housing and food costs to recipients of three and four-year ROTC national scholarships. During the 2025-2026 academic year, which is year three of the Call to Duty Scholarship Program, over 210 cadets will be recipients of the unique merit scholarship, which covers room and board, that works with the ROTC scholarship to lower the cost of attendance for cadets.

Additionally, to attract and retain out-of-state cadets, it is important that VMI provide sufficient financial aid to help meet their demonstrated need. Approximately 60-65% of out-of-state cadets qualify for need-based aid versus 40-45% of in-state cadets. VMI continues to meet 100% of demonstrated need for in-state cadets and between 60-65% for out-of-state cadets.

Although VMI used $3,336,737 of tuition revenue from out-of-state cadets for need-based financial aid in FY2025, this amount represents 10% of total tuition revenue.

VMI will continue to rely heavily on State-provided need-based aid for in-state cadets ($1,575,476 in FY2025), as well as significant private endowments that provide scholarships for needy in-state cadets.

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).

VMI's pricing and financial aid strategies are designed to balance affordability, accessibility, and fiscal sustainability, with careful attention to maintaining enrollment strength across both in-state and out-of-state populations.

FAFSA Simplification and Middle-Income Families:
The recent changes to the Free Application for Federal Student Aid (FAFSA) and the shift from Expected Family Contribution (EFC) to the Student Aid Index (SAI) are beginning to affect middle-income families. In response, VMI has increased efforts to counsel and assist families whose eligibility for federal aid has changed, ensuring they continue to receive consistent and appropriate financial support over the course of their cadetship, especially if their underlying financial circumstances remain stable.

Sustained Commitment to Meeting Need:
VMI continues to meet 100% of demonstrated financial need for Virginia cadets who apply by the priority deadline. The shift to SAI has required the Institute to invest more deeply in financial aid for returning cadets in order to maintain consistent affordability and academic continuity.

Strategic Investment in ROTC and Call to Duty Scholarships:
VMI is also making targeted investments to attract ROTC scholarship recipients—a key segment of the cadet population—through enhanced institutional aid such as the Call to Duty Scholarship Program. These efforts are expected to strengthen both enrollment and net tuition revenue by attracting mission-aligned cadets who often supplement tuition costs through federal and ROTC scholarships.

Managing the In-State/Out-of-State Mix:
The Institute's financial aid model helps preserve the current in-state/out-of-state enrollment mix. However, VMI has seen a decline in cadets paying full out-of-state tuition, driven in part by:

- The expansion of Post-9/11 GI Bill benefits, which allows more out-of-state cadets to qualify for in-state rates.
- The overall rising cost of out-of-state tuition compared to peer institutions.
  To respond, VMI's Board of Visitors has taken a deliberate approach to tuition restraint, including no tuition increase for both in-state and out-of-state cadets in AY 2025–2026. This policy helps preserve affordability and supports enrollment stability.

Expected Impact:

- Sustained enrollment near target levels (~500 new cadets annually).
- Greater financial predictability for families.
- Stabilization of net tuition revenue through a blend of federal, institutional, and private financial aid.
- Continued enrollment across geographic and economic backgrounds.
- Competitive positioning for ROTC-affiliated students and Post-9/11 GI Bill recipients.

COST EFFECTIVENESS

Key question: How has your institution maintained bottom-line financial health <u>and</u> 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).

VMI has faced significant cost pressures, primarily due to inflation, labor market dynamics, and infrastructure-related expenses. The most substantial increases on a per-student and institutional basis fall into three major categories: personnel costs, contracted services, and utilities/infrastructure fees.

Personnel Costs: VMI has not been immune to inflationary stresses as personnel expenses have increased significantly in order to recruit talented and qualified staff to rural Virginia, as well as to retain staff who have key skills. Increases in personnel expenses have been driven by State compensation increases, as well as the implementation of State-provided One Corps, One VMI funding, which is designed to address disparities in employee compensation with classified wage earners, as well as Administrative and Professional employees. Additionally, several key retirements and higher-than-normal turnover have necessitated hiring replacements at increased salaries.

Contracted Services: The cost of services has increased in Lexington and the surrounding region as qualified contractors are being pulled toward large and high-dollar projects due to the amount of infrastructure and stimulus funds being invested. Information Technology services are also increasing significantly as many vendors are offering, or mandating, upgrades to take advantage of changing technologies (cloud storage, AI, SaS, cyber security) which are accompanies by cost increases.

Utilities/Infrastructure Fees: VMI has also experienced an average water and sewer rate increase of 7.7% per year for the last five years as the City of Lexington has undertaken numerous projects to upgrade and replace aging infrastructure. Additionally, new in 2025, VMI and Washington and Lee University reached an agreement with the City of Lexington to measure its water usage via a Master Meter and pay increased water and sewer rates, which are anticipated to cost VMI above $200K more per year. The City of Lexington also implemented a Stormwater Fee for all impervious surfaces within Lexington, and VMI expects its annual fee will approach $35k when fully implemented in 2026-2027.

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).

Within the context of VMI's overall strategic enrollment management efforts, an enhanced emphasis on retention has been initiated since it will improve fiscal health by maintaining Corps strength. These efforts focus on the whole cadet and look to assist new cadets with some of the early challenges they may face while acclimating to college at VMI, as well as on academic preparedness and overall achievement. Aside from new cadets, all cadets are now required to work with their academic advisors and support services if they are at academic risk and new tracking software is used to monitor cadets' academic progress. Such academic support ensures cadets avoid repeating courses, maintain eligibility for State and Federal financial aid, and ultimately graduate on time with their classmates. This allows cadets and families to avoid extra costs, graduate, and enter the workforce timely.

To continue controlling and monitoring expenditures, VMI follows procedures requiring VP-level approval of expenditures exceeding $2,000. Furthermore, VP-level, as well as meetings with the Superintendent, occur quarterly to review individual department budget performance. An additional control that has been in place and is ongoing, is one that requires the Superintendent's Office to approve an Authorization to Fill a Full-Time Position request, which ensures a vacated position must be filled immediately or if a delay is acceptable to realize vacancy savings.

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.

Challenges of recruiting and retention has forced agencies to enlarge its recruiting reach to attract qualified candidates and increase compensation levels for employees with scarce skills. While attracting a PhD in economics to VMI has its own challenges, VMI's unique work force requires it to also hire full-time tailors to service the Corps of Cadets and faculty and staff in uniform.

In addition to the evolving labor market, an emphasis on administrative workloads (accreditation) and mandates, as well as the industry wide practice of reducing and balancing faculty course loads, have contributed significantly to personnel costs that have not been covered by tuition increases or state support.

Enrollment has dipped and personnel costs have increased during the last few years but we anticipate that enrollment will again reach normal levels and stabilize.

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.

Although some growth in enrollment is expected during the next few years, these projected increases are expected to move VMI back toward its optimal Corps-level. Therefore, increased enrollment is not a significant source of revenue available to cover the non-general fund portion of these increases. While it is true VMI benefits from significant private support from the VMI Foundation, such support is typically restricted and not always available to offset personnel costs. Therefore, potential increases in cadet tuition and fees may be needed to offset increases in expenditures.

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.

The ProForma tab's assumptions included conservative estimates for health insurance and compensation increases and any required annual increases beyond the estimates provided by SCHEV would result in additional funding concerns in outer years.

Additionally, if new initiatives specifically outlined in the Six-Year Plan are not funded by the State, VMI will be unable to undertake their implementation without an increase in revenue.

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.

The Institute contributes to both local and regional economic development through outreach and education opportunities for local K-12 students, and development of skilled graduates with in-demand knowledge and leadership abilities.

Highlights include:

- Cyber Smart workshops and summer camps for both high school and middle school students to learn from cyber experts and develop skills to detect, identify, and mitigate cyber-attacks.
- Cyber Fusion and Cyber Cup competitions – hosted at VMI for students at Virginia institutions as well as the six Senior Military Colleges.
- Semester-long internships with the Cyber Defense Laboratory – local high school students work with undergraduate cadets and Virginia Tech graduate students to complete projects in support of cyber defense.
- Environment Virginia Symposium - Almost 600 environmental professionals exchange ideas, best practices, and knowledge, as well as participate in career and recruitment opportunities for new and emerging "green" jobs throughout the Commonwealth.
- Middle School Math Day – faculty and cadets from the Applied Mathematics Department host up to 300 regional middle school students and conduct a math modelling competition to use creativity and problem-solving skills to answer complicated math challenges.
- Membership in the 4-VA Working Group – facilitating collaborative research, course development and redesign, and other cross-institutions initiatives to promote the advancement of the Commonwealth.
- VMI Museum System – comprised of The VMI Museum, Jackson House Museum, and Virginia Museum of the Civil War located at New Market Battlefield State Historical Park, welcomes 80,000 visitors per year to learn about the rich history of VMI and Virginia. The Virginia Museum of the Civil War, for example, provides educational programs fulfilling Virginia Standards of Learning for school children.

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.

Annual training is provided to the Corps of Cadets on existing policies and standards including general order policies and cadet regulations contained within the Blue Book. There have been no complaints filed in a court of law against VMI or any employee for alleged violations of the First Amendment to the Constitution of the United States.

Relevant Institute General Orders/Policies:

General Order 16 – Nondiscrimination Policy
https://www.vmi.edu/media/content-assets/documents/general-orders/GO16.pdf
General Order 96 – The Superintendent's Statement of Free Speech
https://www.vmi.edu/media/content-assets/documents/general-orders/GO96.pdf

General Order 72 – Facilities Utilization, Events, and Speech
https://www.vmi.edu/media/content-assets/documents/general-orders/GO72.pdf
General Order 79 – Distinguished Visitor and Speaker Policy
https://www.vmi.edu/media/content-assets/documents/general-orders/GO79.pdf
Blue Book Chapter 24 – Speech
There is no link accessible to the public. Submitted as attachment.

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.

The Institute has no current plans for new instructional sites, schools, or mergers during the next six years.

[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?

The strategic research priority at VMI is to provide faculty with meaningful research opportunities while offering cadets unique undergraduate research experiences. VMI's focus is not to be or become a research institution, but rather to maintain a strong faculty/cadet relationship while educating tomorrow's leaders in the fields most in demand.

In addition to expanding the facilities available to cybersecurity and Computer and Information Systems cadets, a variety of opportunities through the Commonwealth Cyber Initiative help to prepare VMI cadets for a variety of high-value careers in the cyber realm.

Additional valuable undergraduate research opportunities are funded through the Summer Undergraduate Research Institute which supports cadet-led research projects with one-on-one faculty mentorship. These experiences help to develop the next generation of researchers across STEM And non-STEM disciplines at VMI.

VMI recently began collaborating with the Army Research Lab to offer additional research opportunities with direct benefit to the Department of Defense. This includes faculty engagement with summer programs at the Lab and cadet internships, as well as opportunities for faculty and cadets to partner with the Army Research Lab in research projects throughout the year. Cadets can engage with Department of Defense researchers during their time at VMI and advance their military career options when they commission.

Starting in FY2024, VMI established a new, privately funded, part-time Director of Innovation Programming position, which is responsible for managing and developing academic, industry, and government partnerships, and for coordinating approaches across the Institute for partner engagement. These activities include partnerships and collaborative activities with Mountain Gateway Community College (Buena Vista, VA) and The Blue Ridge School (St. George, VA), with James Madison University's Gilliam Center for Entrepreneurship, the Shenandoah Community Capital Fund (Harrisonburg, VA), and Purple Heart Homes (Statesville, NC). During spring 2025, planning began for The Advancement Foundation/Virginia Innovation Accelerator (Buena Vista, VA) to provide instruction, mentors, and site visits for the Summer Undergraduate Entrepreneurship Program (SUEP) 2025 via an MOU.

VMI's strategic plan sets a goal to "provide the nation and commonwealth's future leaders with a world-class education and training regimen." Key to this success is providing research and experiential learning opportunities through the recruitment and retention of faculty dedicated to VMI's success. VMI believes that the strength of VMI's research opportunities and the opportunities to work closely with a variety of undergraduates is a strong incentive to recruit and retain faculty with strong interest in both teaching and research. These faculty will then serve as both role models and mentors for cadets across VMI. The breadth of research opportunities available across disciplines is also a strong opportunity to recruit and inspire cadets to continue their journeys in research-focused fields. In turn, faculty with leading edge interests in their fields will support VMI's strategic plan's objective to significantly increase externally funded research projects across Post.

[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?

Academic Collaboration

VMI has agreements in place with 16 graduate programs, 15 of which are with schools within the Commonwealth. These agreements facilitate cadets pursuing advanced professional and graduate degrees and certificates and support cadet undergraduate research. These programs include medical, engineering, law, business, and arts programs. VMI intends to continue these agreements and explore others that may present enhanced career opportunities for VMI graduates.

Cooperative Procurement

As a member of the Virginia Association of College and University Purchasing Professionals (VASCUPP), VMI contributes to and enjoys access to over 2,000 cooperative contracts that provide volume pricing for goods and services. This volume pricing is much more favorable than VMI could procure with stand-alone contracts. In addition, the ability to use these cooperative contracts eliminates the need to administratively procure and manage many contracts allowing the VMI Procurement Services Office to function with limited staffing. If VMI did not have access to these contracts, there would be an immediate need for two or possibly three additional procurement professional positions at an estimated annual cost of $130,000 to $200,000.

VMI is also a member of the Virginia Higher Education Procurement Cooperative (VHEPC). Its purpose is to aggregate and leverage procurement requirements and resources resulting in a greater financial advantage from cooperative procurement. Current member institutions include George Mason University, Old Dominion University, University of Virginia, Virginia Tech, Virginia Commonwealth University, College of William & Mary, James Madison University, Radford University, Virginia Military Institute, UVA Wise, Virginia State University, Longwood University, University of Mary Washington, Christopher Newport University, Norfolk State University, and the Virginia Community College System. The VHEPC's focus is directed to commonly used goods and services unique to higher education and builds upon the strong foundation put in place through the Virginia Association of Schools, Colleges and University Procurement Professionals (VASCUPP). The VHPEC has demonstrated that collaborative procurement has resulted in price reductions leading to increased savings by combining annual spend and resource allocation, ultimately producing economies that reduce the resources (time, people, effort) required by a single institution. VMI has followed the recommendation of the Joint Legislative Action Review Committee (JLARC) by instituting mandatory use contracts that maximize value-added standardization.

[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.

Policy change recommendations for improved efficiency and minimization of cost:

1. Support for unfunded mandates:
    1. Full state funding for VMSDEP waivers (estimated cost for FY26 is $1.5M).
2. Building affordability funding from FY26 into institutional base funding in FY27

[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.